



PeopleSoft 8.00.01 Time and Labor PeopleBook

SKU MATLr8SP1B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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ABOUT THIS PEOPLEBOOK

The book provides you with the information you will need for implementing and using PeopleSoft Time and Labor. You can order the online version by requesting SKU HRB8SP1R0, or the hard-copy version by requesting SKU MATLr8SP1B 1200.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft components, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals

The *PeopleSoft Time and Labor 8 PeopleBook* provides you with implementation and processing information for your PeopleSoft Time and Labor system. However, there is additional, essential information describing the setup and design of your system that is contained in a companion volume of documentation called *PeopleSoft Application Fundamentals*.

PeopleSoft Application Fundamentals consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing only PeopleSoft Time and Labor, some combination of products within the product line (for example, PeopleSoft Projects, Projects, Payroll For North America, Benefits, and Global Payroll, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals* PeopleBook, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals* and other PeopleBooks.

Below you'll find a list of those *PeopleSoft Application Fundamentals* sections that apply specifically to PeopleSoft Time and Labor.

Introduction to PeopleSoft HRMS introduces you to the basic concepts of PeopleSoft Human Resources and reviews the various activities involved in using the system, including setting up system-wide and HR information, performing daily processes, working with PeopleSoft Human Resources windows, and generating reports.

Regulating HRMS System Data reviews the Business Unit/SetID feature which allows you to organize your businesses by dividing them into logical units other than Companies and Departments, and also allows you to control how your organizational data is shared among those organizational units.

Working With Languages discusses PeopleSoft's language support features.

Setting Up Control Tables discusses the different ways you can run PeopleSoft Human Resources and helps you decide which way it should be used. Setting Up Controls Tables also instructs how to set up data that serves as the foundation of your organization's human resource system. These tables are the basis not only for Human Resources, but all your PeopleSoft HRMS applications.

Administering Security reviews how to set up and maintain security for employee data by using a security tree. This allows you to view and update the reporting relationships among units and use this information to grant and deny user access to employee data. You can also choose to set up employee data security in other ways, if that is what you need.

Using Mass Change describes how you can select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

Mapping Your Business Processes explains the ability to define graphical, process-based maps. With maps, you can create a visual overview for each of your business processes to see how a particular task fits into the big picture and quickly navigate to the panels you need.

Working With Multiple Components of Pay discusses how you use the system to tailor unique compensation packages for each of your employees or create default pay component packages that are consistent for jobs and salary steps throughout your organization.

Working With Multiple Jobs explains how several PeopleSoft HRMS applications enable you to process information for employees who hold multiple, concurrent jobs within an organization.

Working With Groups shows you how to use the Group Build functionality in HRMS, which gives you a standardized way to create groups of employees and non-employees. Once you've

created a group using this feature, you can use it across several HRMS products for a wide variety of purposes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.



Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site:
<http://www.peoplesoft.com/>

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.00.01 HRMS PeopleBooks* and *PeopleTools 8.12 PeopleBooks*, SKU CD-HRB8SP1R0.



Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft 8.00.01 Application Fundamentals for PeopleSoft HRMS
- PeopleSoft 8.00.01 Base Benefits
- PeopleSoft 8.00.01 Benefits Administration

- PeopleSoft 8.00.01 eBenefits
- PeopleSoft 8.00.01 eCompensation
- PeopleSoft 8.00.01 eDevelopment
- PeopleSoft 8.00.01 eEquity
- PeopleSoft 8.00.01 ePay
- PeopleSoft 8.00.01 eProfile
- PeopleSoft 8.00.01 eRecruit
- PeopleSoft 8.00.01 eTime
- PeopleSoft 8.00.01 FSA Administration
- PeopleSoft 8.00.01 Global Payroll
- PeopleSoft 8.00.01 Human Resources
- PeopleSoft 8.00.01 Payroll for North America
- PeopleSoft 8.00.01 Payroll Interface
- PeopleSoft 8.00.01 Pension Administration
- PeopleSoft 8.00.01 Stock Administration

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet

From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft Internet site: <http://www.peoplesoft.com/>.

Telephone

Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559**.

EmailEmail CPI at callcenter@conpub.com.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	Definition
As of Date	The last date for which a report or process includes data.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row. For more information about effective dates, see Using PeopleSoft Applications, “Working With Browser-Based Applications” in your <i>Using PeopleSoft Applications PeopleBook</i>.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.

Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests.
	For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Manager, “Process Scheduler Basics” in your <i>PeopleTools PeopleBook</i>.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
	For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Manager, “Process Scheduler Basics” in your <i>PeopleTools PeopleBook</i>.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company’s structure and processing options.
Short Description	Freeflow text up to 15 characters.
User ID	The system identifier for the individual who generates a transaction.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

*Description:
 Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

<code>monospace font</code>	Indicates PeopleCode.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as Save and Run).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.

Cross-references

The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:

For more information, see Documentation on CD-ROM in *About These PeopleBooks: Additional Resources*.

• Topic list

Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.



Name of Page

Opens a pop-up window that contains the named page. Click the icon to display the page. Some screen shots may also appear inline (directly in the text).



Text in this yellow bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.



Text in this gray bar indicates For more information cross-references to related or additional information.



Text within this bar outlined in red indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page Introductory Table

In the documentation, each page description in the application will include an introductory table with pertinent information about the page. Not all of the information will be available for all pages.

Usage	Describes how you would use the page or process.
Object Name	Gives the system name of the page or process as specified in the PeopleTools Application Designer. For example, the Object Name of

	the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page or process.
Prerequisites	Specifies which objects must have been defined before you use the page or process.
Access Requirements	Specifies the keys and other information necessary to access the page. For example, SetID and Calendar ID are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
 PeopleSoft, Inc.
 4460 Hacienda Drive
 Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Introduction to PeopleSoft Time and Labor

PeopleSoft Time and Labor is an intuitive, innovative time and labor system that gives you complete control over all aspects of time and labor tracking and reporting.

PeopleSoft Time and Labor is flexible; you can set up the system to meet all your organization needs, that includes compensation workgroups; taskgroups for task-intensive time reporting; and grouping time reporters to meet your own specific needs, such as by floor, department, and so on. We also include a robust scheduling feature that enables you to create schedules that communicate workforce attendance expectations and facilitates the planning and compensation of time. Schedules enable you to streamline a time reporter's reported time data.

The heart of the application is our Time Administration rules processing feature. All aspects of time reporting are processed through this part of the application. You create rules using templates, or you can create really complex rules using Structured Query Language (SQL). Time Administration can handle simple and complex rules processing, depending on your own organizational needs.

We also provide easy-to-use weekly elapsed time and weekly punch time pages so your time reporters can report time for daily, weekly, or monthly periods; these pages also enable managers to easily review and change time after it has been reported.

Time Collection Device Reporting

We use the term Time Collection Device (TCD) to encompass the reporting of time as *hours: minutes*, regardless of the technology.

We provide the ability for time reporters to report their time in terms of start and stop times. PeopleSoft Time and Labor utilizes Application Messaging technology to service customers who need to support all types of time capture devices. With our Time Collection Device interface, our packaged integration points provide the ability to collect clock and elapsed time from any collection device for processing through PeopleSoft Time and Labor. And, we can send necessary setup data to these devices for improved capability and flexibility for reporting time. Setup data, such as employee data, supervisor information, task detail, and restriction rules is synchronized with the clock system. In addition, PeopleSoft Time and Labor supports scheduling, reporting, managing, and applying rules for this method of time reporting.

Administering Time – Our Rules Approach

PeopleSoft Time and Labor uses an object-based approach for executing and processing rules. To implement the object-based rules approach, we have created a set of tools that you can use to define all of your rules easily, even for the most complicated algorithms.

First, we provide templates for the more simplistic or straightforward rule calculations. Second, PeopleSoft Time and Labor provides a tool set for you to use to codify those rules that are more complicated than those defined within a template structure. Third, we provide user exits to accommodate those constructs that cannot be done through the templates or tool set.



For more information about how to create rules, see *Creating Rules in Time Administration* in this PeopleBook.

Referential Integrity

PeopleSoft Time and Labor takes a proactive approach to referential integrity (RI). As setup objects change, PeopleSoft Time and Labor looks proactively through previously reported time and payable time to see if the time needs to be updated or reviewed. This validation only occurs when a setup table changes when you are in a production environment.



For more information about how referential integrity works within the system, see *Understanding Referential Integrity* in this chapter.

Financial/Analytical Applications Interfaces

We use PeopleSoft Application Messaging that makes interfacing to PeopleSoft Projects flow back and forth easily between the two products by streamlining setup tables. In addition, the interface with Enterprise Performance Management provides the flexibility to extract processed time from PeopleSoft Time and Labor quickly and efficiently whenever necessary.

Project information is kept synchronized between HRMS, and ERP databases. PeopleSoft Time and Labor publishes messages of labor charges and PeopleSoft Projects will accept messages to update project accounting. PeopleSoft Time and Labor will subscribe to project and resource definitions for use in time reporting.



For more information about PeopleSoft Financials interfaces, see *Integrating with PeopleSoft Financials* in this PeopleBook.

Globalization

The PeopleSoft Time and Labor product is totally globalized. You can set up complex time reporting rules specific to a country's customs and regulations. Translated pages are available, as well as the ability to record money in the desired currency.

Behind-the-Scenes Processing

PeopleSoft Time and Labor provides several batch processes that ensures data is error free when you change information online or when the system performs batch processing through Time Administration. These processes include Referential Integrity and Validating Time. The system also uses default processing to determine the correct information to use when processing time.

The following section provides information to help you understand these processes.

Understanding Referential Integrity

Our definition of Referential Integrity (RI) is *issues that occur when an update to an instance of one object invalidates one or more instances in a related object*. In other words, when you make a change to one area of the application, RI makes sure the changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or employee related data that could invalidate related objects or values in the system. The system uses a RI router, or a "virtual process," that determines the impact of changes to reported or created time for the impacted time reporters. Only *online* updates trigger RI processing.

When processing data through PeopleSoft Time and Labor you do not have to worry about changes you make affecting other areas of the PeopleSoft Time and Labor system. RI evaluates changes you have made, or the system made, and re-evaluates any impacted time. As a result, exceptions may be created or resolved for you and payable time will get recalculated where needed. Also, the system will provide error messages when you try to inactivate, delete, or change an effective-dated row that invalidates the association with another table.



We have documented how RI affects each area of the application where appropriate in this book. See below for a list of those areas.

RI starts working when you have selected the **In Production** check box on the TL Installation page.

The process includes:

- Determining impacted reported and payable time, and time reporters.
- Validating time during Time Administration.
- Triggering the creation of exceptions during, the Time Administration process.
- Correcting previously created exceptions.

- Updating TR Status records to reevaluate payable time.
- Not allowing the inactivation or deletion of certain records or the change of effective dated rows.

RI checks for discrepancies and validates time for:

- Time Collection Device data.
- Time collection groups.
- Time reporter data.
- Time Reporting Codes (TRCs).
- Time Reporting Code programs.
- Workgroups.
- Taskgroups.
- Task profiles.
- Rule programs.
- Schedules, schedule calendars, and schedule assignments.
- Time period calendars.
- Comp time plans
- Time reporter association to comp time plans.
- All fields on Job.
- Department table.
- Leave plans.
- Leave Plan table.

RI checks data when any reported or payable time exists on or after the effective dated setup change.

Execute Edit Errors

When you try to change the effective date of a setup page to a date that is greater than a prompt value that resides on that page, you will receive an error message. The message states that you can't change the effective date of the target table to be greater than the effective date of the prompt table.

For example, you will receive an error message if you attempt to change the effective date of the workgroup to be greater than the effective date of the TRC Program. Workgroup is the target table and the TRC Program is the prompt table.

See message number 13500,103 in your Message Catalog. The message states:

Edit Error for field %1. The Value in the column specified is not a valid value. This error may have been caused by a change to the Effective Date or to some other field which controls the list of valid values for the field in question. This error can be corrected by selecting a valid value for this field from the Prompt list, or by correcting the changes which have caused this error. Another option is to cancel the changes and start over.

The field that will be filled in the %1 is the prompt field that is negatively impacted by the effective dated change on the target table.

The following table lists the situations when you will receive the above message.

Target Table (Main Page)	Prompt Table (Table assigned to Main Page)
Workgroup	Rule Program ID
	TRC Program
	Compensatory Time Off Plan
Time Reporting Code	Unit of Measure
	NA Earnings Code
	Global Payroll Take Code
	Global Payroll Earnings Code
TRC Program	Time Reporting Code
Comp Time Plan	Time Reporting Code
Taskgroup	Task Profile
TCD Setup	TCD Type
	TRC Program
	Taskgroup
TL Empl Data (Create or Maintain Time Reporter Data)	Workgroup

Target Table (Main Page)	Prompt Table (Table assigned to Main Page)
	Taskgroup
	TCD Group
	Rule Elements 1-5
Workday	Shift

Understanding Nested Effective-Dated Tables

RI acts upon effective dates throughout the application. The system provides error messages whenever you make invalid changes to effective dated records. The system does not allow effective dated changes to objects that are nested in other effective dated objects when the change will invalidate the association between the two.

When the effective date of the nested object is changed to a date greater than the effective-dated object in which it is nested, you will receive an error message. For example, the effective date of the work group affects Maintain Time Reporter Data; the minimum effective date of the workgroup cannot be later than the effective date of the Maintain Time Reporter Data page. Another example is that the TRC Program effective date cannot be later than the effective date of the workgroup, or TCD group, and so on. The system does not allow you to delete or inactivate rows if it is already being used by another object.

If you try to inactivate or delete an effective-dated row that uses another effective-dated object, the system will make sure the date does not invalidate the association to the nested effective-dated table. For example, if a workgroup is associated with a time reporter and you try to inactivate that workgroup, you will get a message that states you cannot inactivate this workgroup because time reporters are participating in it.

See message number 13500,104 in the Message Catalog. The message states:

Effective Date change invalidates related setup data; date must be on or before %1.

The %1 represents the effective date that needs to be maintained for the integrity of the nested object.

The following table lists the situations when you will receive the above message.

Source Table (Prompt Table) Table assigned to the Main Page	Target Table (Main Page)
Compensatory Time Off Plan	Workgroup
	Comp Plan Enrollment
Time Reporting Code	TRC Program

Source Table (Prompt Table) Table assigned to the Main Page	Target Table (Main Page)
	Compensatory Time Off Plan
TRC Program	Workgroup
	TCD Setup
Rule Program	Workgroup
Workgroup	Create/Maintain Time Reporter Data
TCD Type	TCD Setup
TCD Setup	TCD Group
TCD Restriction Profile	TCD Group
TCD Group	Create/Maintain Time Reporter Data
Taskgroup	Create/Maintain Time Reporter Data
	TCD Setup
Task Profile	Taskgroup
Taskgroup Profile	Taskgroup
Rule Elements 1-5	Create/Maintain Time Reporter Data
Job	Create/Maintain Time Reporter Data
Shift	Workday
	Workgroup

Source Table (Prompt Table) Table assigned to the Main Page	Target Table (Main Page)
Workday	Workgroup
Create/Maintain Time Reporter Data	Comp Plan Enrollment

Understanding Referential Integrity Triggers

When you change an effective dated setup object, the system determines whether or not that change might affect any time reporters' reported or payable time. If a change might affect time reporters' reported or payable time, a row is written into a control record that identifies the set up change that was made, and any validations that should be run as a result of the change.

The RI process triggers Time Validation. Time Validation checks for any reported or payable time that may be negatively impacted by the setup change, and triggers exceptions when the elements in reported time or payable time are no longer valid. If no validation is to be triggered, then the RI process only triggers Time Administration to run, to reprocess payable time that is affected by the setup table change.

When Time Administration is kicked off, it initiates a separate process of RI review. RI first determines whether any rows exist in the control record mentioned in the above paragraph. If rows exist in the control record, RI will determine which time reporters are affected by each change that is identified in the record. The affected time reporters will:

- Have their TA Status changed so they will be picked for Time Administration processing.
- Have their Earliest Change Date set to the first instance of reported or payable time that is equal to or greater than the Effective date of the set up table change.
- Will have time validation run against reported time that is equal to or greater than the new Earliest Change Date.

Finally, Time Administration continues processing, running rules, running Time Administration Validation and ultimately creates payable time based on the updated Earliest Change Date.

An example of this:

Today's date is 2/28/1990. You decide to change the TRC Program on Workgroup A for the effective date of 1/1/1990 from TRC Program A to TRC Program B.

Workgroup	TRC Program ID	Effective Date
Workgroup A	TRC Program A	01/01/1980
Workgroup A	TRC Program B	01/01/1990
Workgroup A	TRC Program A	01/01/1995 (future time could be reported up to this next effective date)

All TRCs reported between the effective date 01/01/1990 and 01/01/1995 need to be reviewed. If the TRCs reported during this time period do not exist in TRC Program B, exceptions will be generated on the invalid time. You will need to change the TRCs associated to that time or adjust the TRCs in TRC Program B to resolve these exceptions.



Note. For RI to correctly trigger on changes to JOB Data, the DEPT_SYNC Message must be active on the ENTERPRISE_SETUP message channel, which is delivered with our Application Messaging feature. See in your PeopleSoft Enterprise Integration PeopleBook for more details on Message and Message Channel setup.



To view the Referential Triggers, see Appendix C: Referential Integrity in this PeopleBook.

Time Administration and Referential Integrity

Time Administration is the heart of the PeopleSoft Time and Labor system; it provides you with all the tools you need to create, maintain, and apply your organization's compensation, task, and exception rules to both reported and scheduled time. In addition to enabling you to define rules, Time Administration consists of a batch process that validates instances of reported time and ultimately generates payable time. Time Administration also creates exceptions.

Time Administration uses RI to check for setup changes that may impact processed time. It makes sure changes, either system-generated or changes made by the user, did not negatively impact other areas in the system or create errors related to reported or payable time.

If you do not include the delivered validation definitions in your validation set, validations against reported time will not be run as part of the Submit Time process. Time Administration still processes its validations before creating payable time, which include comp/leave validation (if required on the TL Installation page), TRC, task and time reporter status validations. This is to ensure that the payable time being created from schedules or reported time is valid.

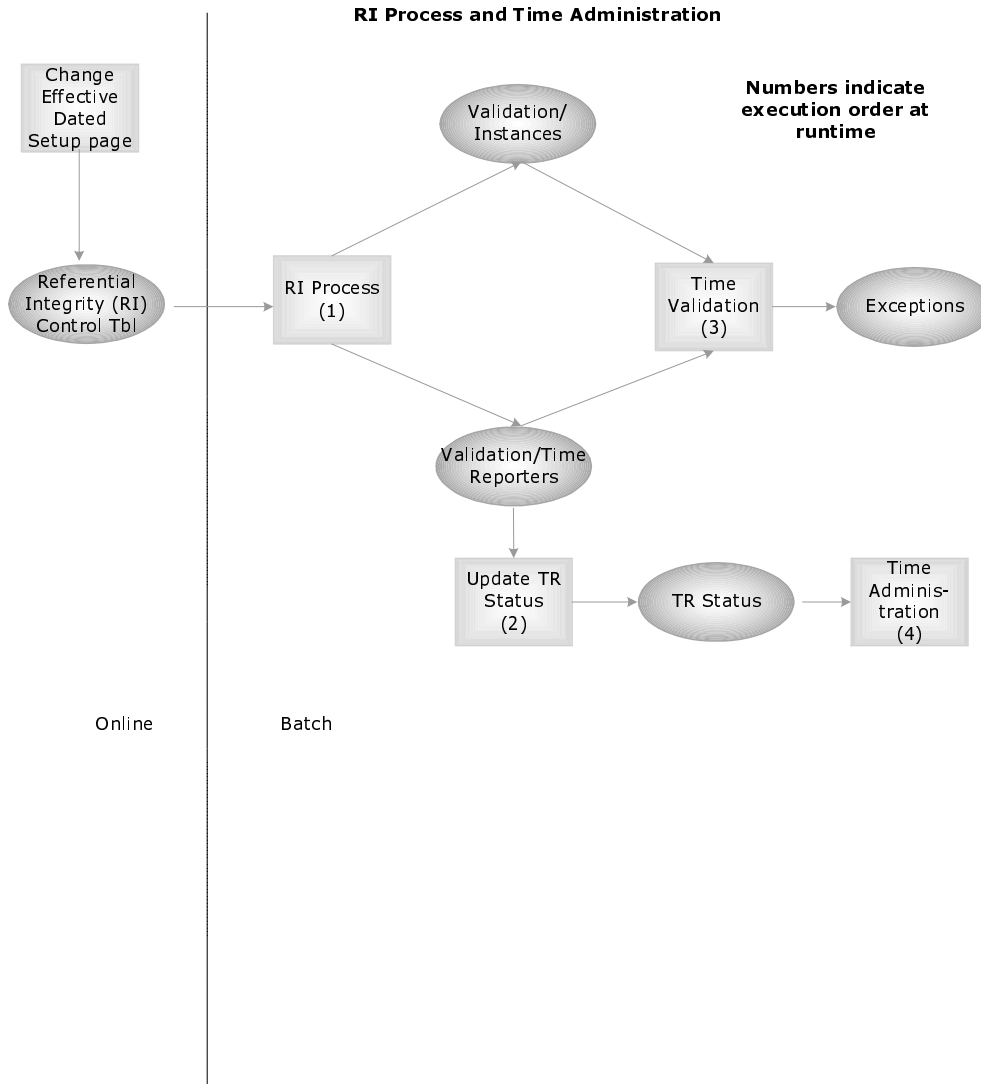


For more information about Time Administration and how the system uses the earliest change date see Creating Rules in Time Administration or Understanding Batch Processing in Time Administration in this PeopleBook.



Time Administration will only calculate payable time for the time reporters defined in the run control for Time Administration. The RI process updates the earliest change dates for time reporters defined in the run control. However, any other time reporters impacted by the RI process that are not included in the current Time Administration run, are reprocessed the next time Time Administration is run with these time reporters.

Here is a high level view of RI and Time Administration.



RI Process and Time Administration



For more information about Validating Time see Understanding Validating Time in this chapter.

Understanding Validating Time

Time Validation reviews user-entered and system-generated data, making sure it is consistent and valid. Time Validation is a behind-the-scenes process that is triggered first by Submit Time, after time is reported, and second when Time Administration is run if there are any entries in the RI CNTRL TBL (meaning there were setup table changes that generated RI occurrences). Time Validation is also triggered again to run after rules processing to validate newly created payable time.

Time Validation is executed in three situations:

- When time is submitted, the Submit Time processes initiate the first execution of Time Validation.

The system validates valid TRCs, valid task data, time reporter status (*Active* or *Inactive*), and comp/leave data. Data coming from your TCD, from Mass Time, Global Payroll Absence Entry, or Rapid Entry all kick off the Submit Time process.

- When RI processing needs to occur during Time Administration processing.

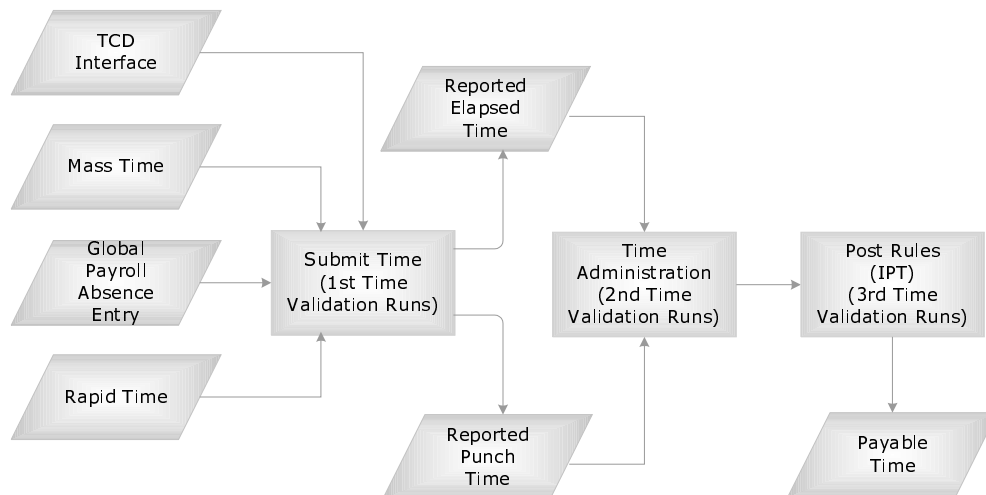
Time Administration initiates the second execution of Time Validation; it validates changes that are stored in the RI control table. It looks for effective date changes that could affect time that was reported in the past.

- When Time Administration has created intermediate payable time.

This is considered postrules validation. Rules have been applied, but payable time has not yet been created. Time Administration initiates the third execution of Time Validation. During this execution, Time Validation checks for changes that the rules may have caused and again validates valid TRCs, valid task data, time reporter status, and comp/leave data.

The following graphic depicts the validation flow.

Validating Time



Validating Time Process Flow

Online Validations

Time Validation acts upon the following pages when you are entering data online.

Time Capture Device	The system provides an error message when you delete or inactivate an effective-dated row on TCD group that is assigned to a time reporter. The system provides an error message when you delete or inactivate an effective-dated row on a TCD that is assigned to a TCD group.
Time Reporter Data	The system provides an error message when you inactivate a time reporter that has reported or payable time on or after the inactivation date. It also provides an error message when you delete a row that invalidates the Time Reporter's association to a Compensatory Time Off Plan, if Use Workgroup Default is not selected on the TL Installation page.
Time Reporting Code	The system provides an error message when you map an earnings type that is invalid for the time reporting code type. The system provides an error message when you delete or inactivate an effective dated row on a TRC that is being used by a TRC program or a Compensatory Time Off Plan.
TRC Program	The system provides an error message when you delete or inactivate an effective-dated row on a TRC Program that is being used by a Workgroup or TCD.
Workgroup	The system provides an error message when you delete or inactivate an effective dated row on a workgroup that is assigned to a time reporter on Create or Maintain Time Reporter Data.
Taskgroup	The system provides an error message when you delete or inactivate an effective dated row on a taskgroup that is assigned to a time reporter, or a time collection device.
Task Profile	The system provides an error message when you delete a taskgroup profile that is assigned to an employee, or if a time reporter has positively reported time to the taskgroup profile.
Comp Time Plan	The system provides an error message when you inactivate a comp time plan that is assigned to a time reporter on Comp Plan Enrollment.
Rule Program	The system provides an error message when you delete an effective dated row on a rule program, which is associated to a workgroup.

Rule Elements 1-5

The system provides an error message if you inactivate or delete a row.

Batch Validations

For a list of validations that will be performed during the Submit Time and RI processes, see Appendix A: Exceptions and Validations.

Updating Time Reporter Status

The Time Reporter Status table is updated for all time reporters where payable time needs to be recalculated. The Earliest Change Date is updated to match the effective date of the change, but only in those cases where the effective date of the change is earlier than the earliest change date. The Earliest Change Date is the Date Under Report of the earliest addition or update to time-related data for a time reporter since the last Time Administration run.

Time Validation and Exceptions

Time validations and exceptions have a one-to-one relationship. When Time Validation runs and finds errors with time based on the above criteria, it creates exceptions that you can view, resolve, or allows using the Manage Exceptions page. The action you can take depends on how you have set up your exception criteria. There are many system-delivered validations and exceptions; you can also define your own exception definitions and validation sets.



For more information about delivered validations and the related exceptions, see Appendix A: Exceptions and Validations. For more information about defining your own exception criteria, see Establishing Exceptions. **For more information** about defining your own validation sets see Defining Application Engine Sections in this PeopleBook.

Understanding Default Processing

Default processing is the order in which the system processes field values. There are fields used by the PeopleSoft Time and Labor system that can be defined in more than one area. We provide this flexibility to enable a higher-level association of time reporters to a common value that makes sense for a given grouping, depending on your own organizational needs. There are times when a more specific value is needed, one that is assigned or reported at an individual level. When the system is processing these field values, it uses default processing to control the order that the system follows to resolve the value for the field.

This chapter summarizes the various elements that follow the default processing order for the purpose of creating reported or payable time. It includes positive reporting of the element, a scheduled value of the element, or default value of the element within the system.

Time Periods

You assign default time period at the workgroup level. You can override this period at the time reporter level by defining a Period ID for the time reporter on the Create or Maintain Time Reporter Data pages. The system first checks the Period ID at the time reporter level, and if that field is blank, the system then checks for the Period ID at the workgroup level.

Time Reporting Templates

You assign a default Time Reporting template at the taskgroup level. You can override this Time Reporting template at the time reporter level by defining a Time Reporting Template ID on the Create or Maintain Time Reporter Data pages. These templates contain the fields that are viewable when you report punch or elapsed time. The system first checks for a Time Reporting Template at the Time Reporter Data level, and if the field is blank, the system checks the for the Time Reporting template at the taskgroup level.

Punch Restriction Profiles

You define values for the **Punch Restriction Profile** on the TCD Group table, or for an individual time reporter at the Create or Maintain Time Reporter Data level. When the time collection device interface is processing, it searches for a profile at the time reporter data level first, and if there is nothing assigned, it searches for the restriction profile at the TCD Group table level.

Taskgroups

You assign a taskgroup to a time reporter using the Create or Maintain Time Reporter Data pages when enrolling employees into PeopleSoft Time and Labor. The system uses this taskgroup during task processing. You can assign the system delivered PSNONTASK taskgroup if your business is not involved in task reporting. A time reporter could override the taskgroup by reporting to another task template or task profile. Also, a time reporter could be scheduled to another (borrowed) taskgroup for the day.

The system first checks for positively reported changes to the taskgroup, and then the taskgroup to which the time reporter is assigned.

Note. If a time reporter reports to a TCD that has a different taskgroup than what was assigned at the employee level, the reported taskgroup is considered *borrowed*.

Task Profiles

There are four ways the system derives task profiles for task processing. Every taskgroup may have a default task profile attached to it. A task profile can be assigned directly to the time reporter, the time reporter can positively report to a task profile from a list of valid profiles for the taskgroup, and a task profile can be overridden through scheduling by importing information from a third-party system.

The system first checks for positively reported task profiles and then checks for scheduled task profiles. If no positively reported or scheduled profiles exist, the system checks the default task profile from the employee data level and, finally, checks the time reporter's taskgroup default task profile.

Holiday Schedules

You can choose a holiday schedule on the Job Data 2 page, or you can assign a holiday schedule to a workgroup. The system first checks the Job Data; it then checks the holiday schedule associated with the workgroup to which the time reporter is assigned.

TRC Programs

You can assign a TRC program to both a workgroup and to a time collection device. When the TCD Interface process executes, it checks specifically for TRCs that are eligible for the TCD and transfers them.

Note. The TRC program assigned to the workgroup and the TRC program assigned to your TCD must be consistent. If there are TRCs in the TRC Program at your TCD that are not valid in the TRC Program on your workgroup, the system will create exceptions, and the time will not be considered payable.

TCD Groups

You can assign a TCD group to a time reporter using the Create or Maintain Time Reporter Data pages, although it is not required. The TCD Interface process resolves the TCD Groups associated with the time reporters and sends data to the correct TCDs to define security access at your TCDs, although this data is not necessary for processing time within the Time and Labor system.

State

You assign a state to an employee on the State Tax Data page. In addition, you can associate a state to a TCD for time reporting imported from a TCD. A time reporter can override the state during positive time reporting or you can override a state using a value scheduled by importing information from a third-party scheduling system. The system first checks to see if the time reporter has reported an override state for a given instance of time. Next it will check if there is a state associated with a TCD to which the time reporter is reporting. Then, the system checks for a schedule override, and finally if no reported or scheduled state is found, the system uses the default state on the Employee Tax Data record for any payroll processing.

Location

You assign a location to an employee on the Job Data 1 page. You can override this location during positive time reporting. You can also override a location using a value scheduled by importing information from a third-party scheduling system. The system first checks for an override at the reporting level, then checks for a schedule override, and, finally, if no reported or schedule location is found, the system uses the default location.

Locality

You assign a locality to an employee on the Local Tax Data page. In addition, you can associate a locality to a TCD for time reporting imported from your TCD. You can override this locality by positively reporting a locality during time reporting or by using a value scheduled by importing information from a third-party scheduling system. The system first checks for an override at the reporting level. If there is no positively reported locality, the system checks for a locality associated to the TCD to which the time reporter is reporting. Then the system checks for a schedule override, and finally if no reported or scheduled locality is found, the system uses the default locality for any payroll processing.

Country

You assign a country to an employee on the Personal Data 1 page. You can override this country during positive time reporting or by using a value scheduled by importing information from a third-party scheduling system. In addition, a country can be associated to a TCD for time reporting imported from your TCD. The system first checks for an override at the reporting level. If there is no positively reported country, the system checks for a country associated to the TCD to which the time reporter is reporting. The system then checks for a schedule override, and finally if no reported or scheduled country is found, the system uses the default country for any payroll processing.

Time Zone

The system gets **Time Zone** values from the PSTIMEZONE table. You can override the time zone during positive time reporting. In addition, a time zone can be associated to a TCD for time reporting imported from your TCD. The system first checks for a positive time reporting time zone override. If there is no positively reported time zone, the system checks for a time zone associated to the TCD to which the time reporter is reporting. Finally, if no other time zones are reported, the system will use the base time zone on the PeopleTools Options page.

Rate

You can override this rate during positive time reporting, or by importing a value from a third-party scheduling system, or by defining a rate on the TRC. The system first checks for an override at the reporting level, then checks for an ad hoc schedule override. If none exist, the system checks for a rate on the related TRC, and finally if no reported, scheduled, or TRC rate is found, the system uses the default comp rate on Job to calculate the estimated gross.

Rate Code

You can use a rate code during positive time reporting or by using a value scheduled by importing information from a third-party scheduling system. The system first checks for an override at the reporting level, then checks for a schedule override. If one exists, it is used in the calculation of estimated gross.

Note. For North American Payroll customers: There are three additional places where rate codes can reside, the Rate Code table, the Job Code table and on the Employee Compensation table. Rate codes from any one of these tables can be entered on the paysheets. When the Pay Calc process runs, the system first checks for the rate code on the Employee Compensation table, then the Job Code table, then the Rate Code table.

Quantity

If you define a **Flat Amount** for a TRC and synchronize it to a NA Earnings Code of a Flat Amount Payment Type, the system does not automatically change your reported Quantity to the Flat Amount. We have delivered rules that you can incorporate into your Rule Program that will update the reported Quantity to the Flat Amount for the TRC.

The system will use what is reported positively on the Weekly Elapsed or Weekly Punch Time pages for the Quantity. If no Quantity is reported, the system will then use the scheduled Quantity.

For more information about how the system handles reported quantities, see PeopleSoft 8 Time and Labor, “Establishing Time Reporting Codes” in this PeopleBook.

Currency

You define the base currency for a time reporter on the Job Data 1 page during the hiring process. You also define a currency for the time reporter when establishing an amount type TRC. You can override the reported currency for a TRC that is an amount type. You can also override the currency by using a value scheduled by importing information from a third-party scheduling system. The system first checks for a positively reported currency for an amount type TRC. If no reported or scheduled currency code exists, then the system checks for a currency code on the TRC definition in the TRC table. Then, if none exist, the system uses the default base currency on the time reporter’s job record.

Schedule ID

You assign a schedule ID at the workgroup level. You can override this schedule ID at the time reporter level by defining a schedule ID on the Assign Work Schedules pages. The system first checks the schedule ID at the workgroup level. If there is no schedule ID at the workgroup level, which might be the case with a positive time reporting workgroup, then the time reporter does not have a long-term schedule.

If a workday override has been made for a day, that workday override will take precedence over any long-term schedule assigned to that day. If any third party schedule information has been imported for a day, the third party schedule information will take precedence over any long-term schedule assigned to the day and any workday override that has been scheduled for the day.

Rule Elements

You assign rule elements (up to five) on the Create/Maintain Time Reporter Data pages. You can override rule elements during positive time reporting or by using a value scheduled by importing information from a third-party scheduling system. The system first checks for an override at the reporting level, then checks for a schedule override, and finally, if no reported or schedule rule element is found, the system uses the default rule elements.

Time Reporting Code

You create TRCs using the TRC setup tables. A TRC can be positively reported or derived during rules processing. It can also be scheduled by importing information from a third-party system. Positively reported TRCs populate the Reported Elapsed Time tables. Scheduled or derived TRCs are sent directly to payable time.

Billable Indicator

The billable indicator can be positively reported. It can also be scheduled by importing information from a third-party system. Positively reported billable indicators populate the Reported Elapsed Time tables. Scheduled or derived billable indicators are sent directly to payable time.

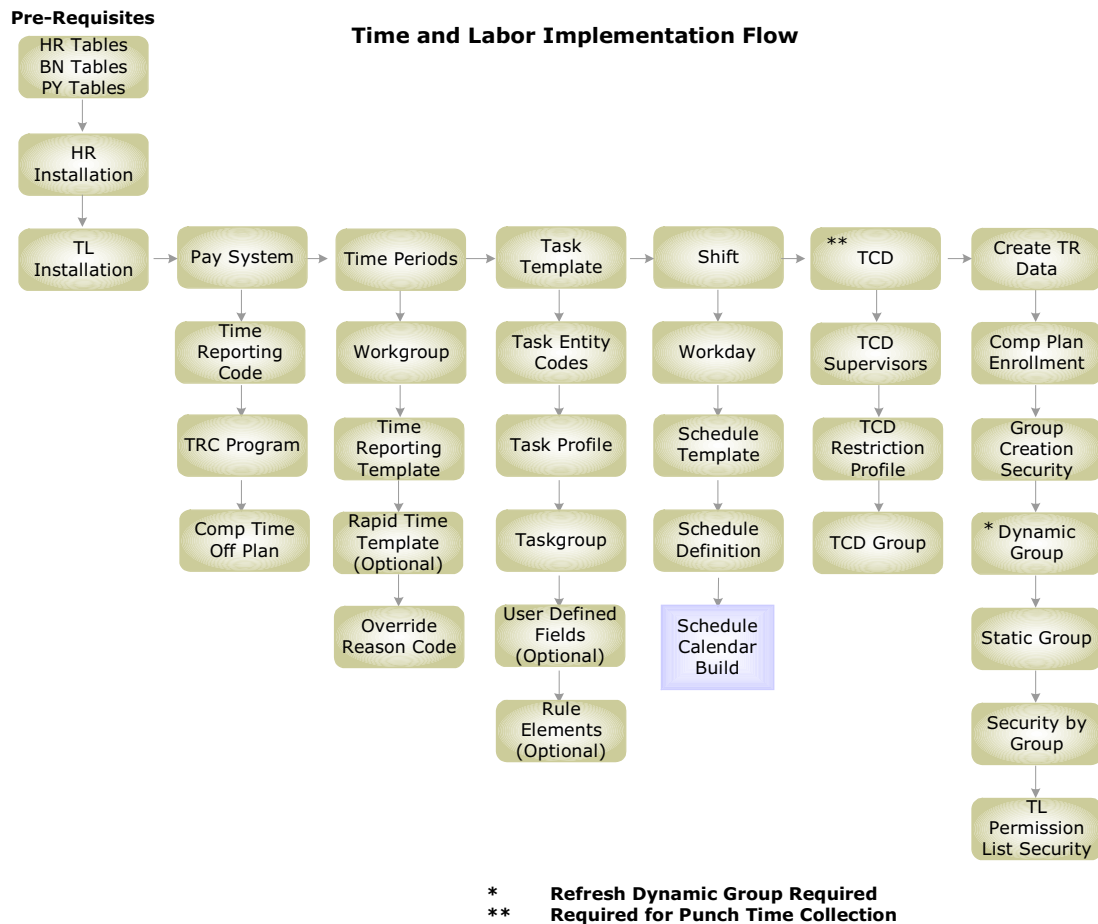
CHAPTER 2

Setting Up Your Basic Tables

This section contains information on how to set up Human Resources, Benefits, Tools, as well as Time and Labor tables that are critical to the operation of the entire Time and Labor system. Additional information on how to set up your system to report time, process time, and pay your time reporters can be found in other sections of this book. These sections are:

- Establishing Workgroups
- Establishing Time Reporting Codes
- Defining Task Reporting Requirements
- Defining Schedules
- Establishing Static and Dynamic Groups
- Setting Up Time Reporters
- Establishing Time and Labor Security
- Creating Rules in Time Administration
- Using Time Collection Devices
- Integrating with Payroll Applications
- Integrating with PeopleSoft Financials

The following graphic shows the tables and pages required to implement PeopleSoft Time and Labor.



Time and Labor Implementation Flow

Setting Up Your Human Resource Tables

The PeopleSoft Time and Labor system uses PeopleSoft Human Resources Management (HR) tables to extract all the basic information about your company that will be used during Time and Labor processing. You must set up these tables before you establish any other tables in the system. HR tables used by Time and Labor include the Installation, Company, Location, Department, Compensation Rate, Job Code, and Pay Group tables.

General Options Installation (you must select PeopleSoft Time and Labor as an installed Product)

Business Units (used for task reporting in Time and Labor and to resolve SETID for other fields)

SetIDs (used to resolve values for reporting on Job Code, Location, and Department by using the Business Unit)

Company (used for task reporting in Time and Labor)

Location (used for task reporting in Time and Labor)

Department (used for task reporting in Time and Labor)

Job Code (used for task reporting in Time and Labor)

Pay Group (used in distribution to define parameters for payment of Payable Time)

Comp Rate Code Table (used for elapsed time reporting with TRCs)

Holiday Schedule (used for scheduling and rule processing)

Setting Up Your Benefits Tables

Benefits tables store leave plans and accrual balances. These plans include vacation, sick, and disability leave. PeopleSoft Time and Labor uses Benefits Tables for determining leave accrual balances. These tables include the Benefits Plan and Leave Plan tables. You must set up these tables before you begin setting up your PeopleSoft Time and Labor tables. You'll first define all benefit plans by plan type, with vendor and group information. Once you define your benefit plans for plan types such as "sick" and "vacation," you must then define the accrual rules for that plan on the Leave Plan table.

Leave Plan Table

The Leave Plan table allows you to define service and accrual processing rules for your leave plan. When you have selected Time and Labor on the Installation table, the **Max Negative Hours Allowed** field will be available for data entry when you select the **Allow Negative Balance** check box on the Manual Accrual Processing section of the Leave Plan Table page. You can enter the number of negative hours you will allow for this plan in the **Max Negative Hours Allowed** field. The **Max Negative Hours Allowed** field and the active association of time reporters to a Leave Plan is important for the Leave Validation processes within PeopleSoft Time and Labor.



To set up your leave plan, you'll use the Leave Plan Table Page.



For more information about leave validation in Time Administration, see Check Leave and Comp Time Balances.



Note. Any changes you make to the Allow Negative Balance or the Max Negative Hours Allowed check boxes will trigger referential integrity processing in Time and Labor, to ensure that unpaid leave time is not invalidated. Similarly, any additions or changes you make to the Plan Type, Coverage Election, or Benefit Plan on the Leave Plan page will trigger referential integrity processing in Time and Labor to ensure that unpaid leave time is not invalidated.

Creating Time Zone Offsets

PeopleTools *stores* time/date information in only one time zone—the "Base Time Zone" you select at the time of installation, and should never change. The base time zone may be set to the time zone of the company's headquarters, or perhaps to Greenwich Mean Time (GMT)—also known as UTC (Universal Coordinated Time).

When employees enter the hours they have worked in Time and Labor, they report time according to the local time zone and PeopleTools stores the information in the base time zone. The Time Administration process then converts the base time back to the local time for rules processing. To do this, it needs to know the time zone "offsets", or the differences between the local time and base time. The following procedure explains how to select the base time zone and create time zone offsets.

To select the base time zone and create time zone offsets:

1. Select the Base Time Zone on the PeopleTools Options page.

In the Base Time Zone field, select the time zone in which you want all reported time to be stored.



For more information on the PeopleTools Options page, see your PeopleTools PeopleBook.

2. Change the default settings on the Time Zone Data page and Daylight Savings page, if applicable.

The Time Zone Data page and Daylight Savings page display the default time zone settings delivered with PeopleTools. You can change the settings on these pages if you need to customize the information for your organization.



For more information on the Time Zone Data and Daylight Savings pages, see your PeopleTools PeopleBook.

3. Create time zone offsets using the Time Zone Data page.

Click the Generate Query Offsets button on the Time Zone Data page to populate the time zone offsets table with values that represent the differences between the local and base time zones.



For more information on the Time Zone Data page, see your PeopleTools PeopleBook.

Establishing TL Installation Options

You use the TL Installation page to establish general system defaults. You also use this page to determine if your organization is testing the system or if you are in production. You can load system dates; establish links with PeopleSoft Projects and PeopleSoft Enterprise Performance Management; and define the paths you will use for flat file TCD Integration.

TL Installation Page

Usage	Use the TL Installation Page to set up general system defaults and to activate specific features for your PeopleSoft Time and Labor application.
Object Name	TL_INSTALLATION
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Installation Options
Prerequisites	None.
Access Requirements	None.

TL Installation	
☐ Production Environment ☒ Interface with PS/EPM ☒ Interface with PS/Projects ☒ Calculate Estimated Gross	
Validation Options Validation Set: ST_ALL Search Load Dates	
Leave Balance Validation ☐ Online Only ☒ Both Online and Batch ☐ Batch Only ☐ None	Comp Balance Validation ☐ Online Only ☒ Both Online and Batch ☐ Batch Only ☐ None
Rules Processing ☐ Automatic Rules Run Max Employees In Rules Run: 10000	Comp Plan Assignment ☒ Default From Workgroup
File Dest for TCD Integration Outbound File Directory: c:\temp\ Browse Inbound File Archive Directory: Browse	

TL Installation page

TL Parameters

Production Environment

Select this check box to inform the system you are going into production and are no longer in a testing environment. You use this flag to test the production functionality of the referential integrity processing as well as the ability to change task templates and rules. Using this flag helps you to understand exactly how the system responds when you are truly live and in production. This flag controls whether Time Administration will run the Referential Integrity process which will check for any changes made to the other setup tables.

If you select this check box, and then clear it, any entries in the Referential Integrity control table are deleted and Referential Integrity processing will not occur during the Time Administration process.

The following table describes how certain processes function when the **In Production** element is Selected or Cleared.

In Production Element—Selected vs. Cleared

Process	<i>What Happens When In Production Flag Cleared/Selected</i>
Time Administration	Cleared - When the flag is cleared, a warning message is provided indicating that your system is not in production and the Referential Integrity (RI) process will not be called from Time Administration every time you initiate the process or save the run control. Selected - When the flag is turned on, no warning message is provided.
Task Templates	Cleared – When the flag is cleared, you can change your Task Template elements to required, optional, or not used. These changes are allowed, but if you have live data already reported to a template, the resulting tasks may be invalidated, and there will be no validation to catch these errors. Selected –You can make changes to the task template by adding optional task elements or changing required elements to optional.
System Date/TL Security	Cleared – When the flag is cleared, you can select the system date so that the system date displays on the TL Permission List Security page. PeopleSoft Time and Labor provides this option so that you can set up a testing environment in which various users access the same database and enter different system dates to test different time frames. Selected – When the flag is turned on, the System Date field does not display on the TL Permission List Security page.
Referential Integrity	Cleared – When the flag is cleared, Referential Integrity processing of changes to effective dated tables will not take place. Normally, this involves a re-evaluation of reported and payable time, and the creation of exceptions for all time that is affected by the change. Selected – When the flag is turned on, referential integrity processing occurs as necessary. Note. During non-production times you do not need the system to perform referential integrity checks because your setup tables will change often, and the reported time is not “real.”
Rule Objects	Cleared – When the flag is cleared all rule objects can be changed. Selected – When the flag is turned on, no rule objects can be changed.

Calculate Estimated Gross

Select this check box if you want the system to calculate estimated gross for all instances of time. The default value is **Selected**. If you clear this check box, all instances of time from that point forward won't have the estimated gross calculated during the Time Administration process. If there is payable time with estimated gross attached that you don't want, you'll have to re-run the Time Administration process.

You can view the estimated gross by TRC for the time reporter by accessing the Payable Time pages in PeopleSoft eTime Collaborative Applications. After a payroll has been run, the actual gross is distributed back to PeopleSoft Time and Labor during the Labor Distribution process.

For example, you may want to book to your general ledger outside of the pay cycle. You can use our estimated grosses to book your costs ahead of time, then when the actual dollars from our Labor Distribution process are posted, you can reverse out the estimates and replace them with the actual amounts.

Interface with PS/Projects

Select this check box if your organization uses PeopleSoft Project Costing and will be interfacing from Time and Labor to it. The default value is cleared.

Interface with PS/EPM

Select this check box if your organization uses PeopleSoft Enterprise Performance Management and will be interfacing from Time and Labor to it. The default value is cleared.

Validation Set ID

Select the validation set ID to determine the validation definitions that will be run during the Time Reporting validation process. This validation process is triggered by the Submit Time process as well as during the Referential Integrity process. The system delivered validation set is ST_ALL, which contains all system validation definitions.

Load Dates Pushbutton

When you click the **Load Dates** button the system sends you to the Dates Table Load secondary page. With this page you can determine the range of dates you want to use for time reporting purposes.

Leave Balance Validation**Online**

Select this option if you want the system to validate leave balances when entered during online processing only.

Batch	Select this option if you want the system to validate leave balances during batch processing of rules or validating time only.
Both Online and Batch	Select this option if you want the system to validate leave balances during online and batch processing.
None	Select this option if you don't want the system to validate leave balances.
	If you change the validation option, all time processed is date effected accordingly. All time processed prior to the change may need to be re-evaluated, because leave balances have already been processed, and exceptions will be created.

Comp Balance Validation

Online	Select this option if you want the system to validate comp balances when entered during online processing only.
Batch	Select this option if you want the system to validate comp balances during batch processing of rules or validating time only.
Both Online and Batch	Select this option if you want the system to validate comp balances during online and batch processing.
None	Select this option if you don't want the system to validate comp balances.
	If you change these values, all time processed is date effected accordingly. All time processed prior to the change may need to be re-evaluated, because comp time has already been processed, and exceptions will be created.



For more information about online and batch validations, see Understanding Validating Time.

Rules Processing

Automatic Rules Run

Select this check box if you want the system to automatically run the Time Administration process following the Submit Time process. The default is selected. The Submit Time process is initiated through the Mass Time, Rapid Time, and TCD Interface reporting processes. If this check box is selected, any time that is processed through Submit Time will also be processed through Time Administration to create payable time. The only exception is Global Payroll absence entries, which will automatically process from Submit Time through Time Administration.

Max Employees in Rules Run

Enter the number of employees you want the system to process at a time when running rules (Time Administration). The number controls system performance during batch processing. The default value is *100*.

Comp Plan Assignment

Default From Workgroup

Select this check box if you want the system to automatically populate the Comp Plan Enrollment Page with the comp plan associated with the workgroup of a time reporter. If you select this option, you can't override the comp plan assignment on the Comp Plan Enrollment page. Also, you can't delete or inactivate the comp plan on the Comp Plan Enrollment page because it is controlled by the association of the workgroup to the time reporter. You can, however, alter the comp plan association for the time reporter in two ways. One is by changing the workgroup associated with the time reporter on the Maintain Time Reporter data page. The other is to change the comp plan associated with the time reporter's workgroup. The system will automatically update the comp plan association accordingly.

If you don't select this check box, you can enter as many rows as you want on the Comp Plan Enrollment page and inactivate any comp plans you feel necessary. You can't, however, delete a row on the Maintain Time Reporter data page if it inactivates an active association to a comp plan. You will need to inactivate the association of the comp plan to the time reporter on the Comp Plan Enrollment page. Once this is done, you can delete the row on the Maintain Time Reporter Data page.

Important! You can only change this option once. The system doesn't enable you to change this value back and forth because when you clear this field, the system deletes comp plan rows on the Comp Plan Enrollment page. Then, the system derives the workgroup's comp plan from the association defined during the Create Time Reporter Data setup. If you were to make changes to this value again, any comp plan balances could be completely invalidated due to the changes in the comp plan associations and the TRCs assigned to the comp plan.



For more information about establishing workgroup defaults, see Establishing Workgroups.

File Dest for TCD Integration

- Outbound File Directory**

Enter the directory path where you want the TCD outbound flat files created via application messaging to be stored. These files are sent to your time collection device. Your path must end with a backslash (\) for successful creation of the flat file. This directory is for flat file TCD integration only.
- Inbound File Archive Directory**

Enter the path where you want TCD inbound flat file data to be archived after the inbound file process has read the data. Your path must end with a backslash (\) for successful creation of the flat file. This directory is for flat file TCD integration only.



For more information about time collection devices, see Using Time Collection Devices.

Dates Table Load

Usage	Use the Dates Table Load page to load dates into your Time and Labor system.

Object Name	TL_DATE_LOAD
Navigation	To access the Dates Table Load page, click the Load Dates button on the TL Installation page.

Dates Table Load

The 'Years' field below will determine the range of dates populated into the Dates Table. The Dates Table is used by many functional areas of Time & Labor. The volume of data in this table will affect performance of the Weekly Elapsed/Punch Time pages. The recommended value for the 'Years' field below is 2. The value of 2 years will load the dates table from 2 years before the current date and 2 years after the current date, resulting in 4 total years.

The Dates Table is used to provide all pertinent information related to a date. This information includes: Day of Week, Day of Month, Week of Month, Week of Year, Month of Year, Calendar Year, and Julian Date.

Years:

Dates Table Load page

Years

Enter the number of years you want the system to load into the database. The system will enter the dates for the number of years you entered, backward and forward. For example, if you entered **2**, the system would load 2 years backward and 2 years forward. The maximum number of years you can enter is **10**.

Initiate Date Load

Click the **Initiate Date Load** button to load dates into the system.

Return

Click the **Return** button to go back to the TL Installation Options page.

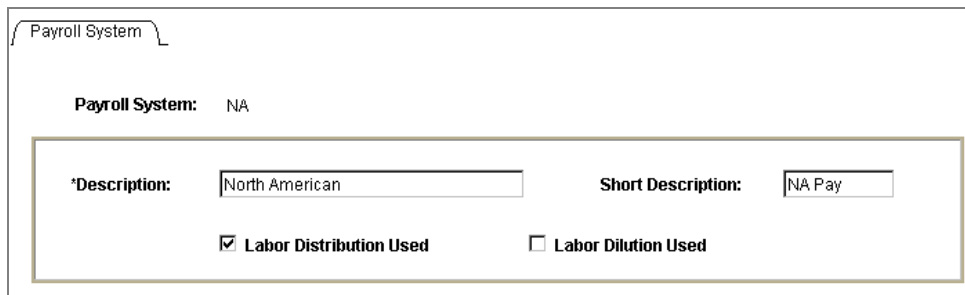
Establishing Pay System Options Overview

This page enables you to establish the type of payroll system(s) you intend to use with PeopleSoft Time and Labor. The delivered system contains both PeopleSoft Global Payroll and North American Payroll.

You can also choose to have labor distribution performed on the costs being retrieved from the payroll system, as well as labor diluted, which is the breakout of costs to the original time entered.

Payroll System Page

Usage	Use the Pay System Page to establish the payroll system you intend to use and to determine labor distribution and dilution use.
Object Name	TL_PAYSYS_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Pay System, Payroll System
Prerequisites	None.
Access Requirements	Enter a payroll system name.



Payroll System

Payroll System: NA

Description: North American Short Description: NA Pay

☒ Labor Distribution Used ☐ Labor Dilution Used

Payroll System page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Payroll System

This field reflects the value you entered to access the Page. You enter a value for the payroll system you'll be using. You need to define a value for each pay system you use. You must define these systems for time reporting code (TRC) to earnings code mappings and for distributing time to the correct pay system.

Labor Distribution Used

Select this check box if you want to use PeopleSoft Time and Labor's labor distribution feature to distribute payroll expense (currencies) back to Time and Labor. The default is selected. When selected, payroll expense is distributed to all applicable PeopleSoft Time and Labor earnings and task records. This updated time can then be extracted for additional processing by your other applications, such as project-costing, accounting compensation-planning and budgeting systems.

If you clear this box after time has been processed, you may want to check for any time that may have currently been labor distributed.

Labor Dilution Used

Select this check box if you'll be using PeopleSoft Time and Labor's labor dilution feature to dilute distribution to account for time that is paid at different rates, or to dilute labor distribution across all hours, whether an employee was paid for time or not. The default is selected.

If you clear this check box after time has been processed, you may want to check for any time that may have currently been labor diluted. This check box isn't available unless you select the Labor Distribution option. Labor dilution is run within the Labor Distribution process.



For more information about Distributing and Diluting Labor see Integrating with Payroll Applications.

Establishing Periods and Calendars

Periods and calendars play several important roles in the Time and Labor system. They are used to establish periods for reporting time; they allow you to create periods for attendance tracking; they enable Time Administration to select the data needed for rules processing; and they enable the system distinguish between prior and current periods. This section describes the function of periods and calendars in the system, and explains how to create period instances using the Build Time Period Calendar Process.

Understanding How Periods are Used in Time and Labor

You can define five types of periods in Time and Labor: (1) Daily, (2) Weekly, (3) Monthly, (4) Complex, and (5) Repeating. Although all period types are defined using the same set of Pages, not all period types are used in the same way. For example, Daily, Weekly and Monthly period types are used to create time reporting periods, but Complex and Repeating periods have no application to time reporting—their only purpose is to define periods for rules processing. This section describes the different uses of periods in the system, and contains important information on when you can use each period type.

Defining Period Functions

Periods have the following uses in the Time and Labor system:

Time Reporting

Periods enable you to define periods for time reporting purposes—for example; employees in your company might report time for a day, a week, or a month at a time. You can align these time periods to your pay period, billing cycle or fiscal period depending on your needs. Although you can define as many as five different types of periods using the Time Period pages, only three types of periods are used for time reporting purposes: Daily, Weekly, and Monthly. Two additional periods' types—Complex and Repeating—are used exclusively for rules creation, and have no use in time reporting.

Determining Periods to Process

Time and Labor uses time periods--identified via the Time Period ID on each time reporter's workgroup--to help determine the correct time period(s) to process (and pass to Payable Time) when you run Time Administration. For example, you might need to process time for a workgroup that reports time on a weekly basis. To determine the correct weekly period(s) to process, Time and Labor looks to the Period ID associated with the time reporter's workgroup.



For more information on how the system uses the Period ID to determine the correct period to process, see Understanding Batch Processing in Time Administration.

Determining Rule Application

Time periods are used to determine the range of dates to which a rule should be applied. For example, if you define a rule program containing a daily, weekly, and monthly rule, you must build a calendar containing the periods to which each of these rules applies. In other words, for each rule period (daily, weekly, and monthly), you must define the corresponding calendar period containing the data needed to process the rule.

When defining calendar periods to correspond to your rule periods, you can use the same period types used in time reporting (daily, weekly, monthly). In addition, you can define repeating and complex period types to use in connection with complex and repeating rule periods. For example, suppose you defined the following complex rule that looks at time reported on the last Sunday in April: If a time reporter works on the last Sunday in April, the employee will automatically receive 4 hours in addition to the time he/she actually reports for the day. For this rule to work, you would need to identify the last Sunday in April by creating a complex period. Otherwise, the rule will not know what day to look at.



For more information about rules and their relation to periods, see Creating Rules in Time Administration.

Tracking Attendance

When you set up attendance tracking in Time and Labor, you'll need to specify the time periods for which you want to track absences, late punches, early departures, and so forth (for example, late punches in a day, absences per week). The same three period types used for time reporting purposes should be used for attendance tracking: Daily, Weekly, and Monthly. The other two periods types—Complex and Repeating—are also available but are not recommended.



For more information on attendance tracking, see *Defining Attendance Programs*.

Determining Current and Prior Period Time

Periods are used to help the system distinguish between prior and current period time—that is, time entered for periods that have already been processed as opposed to time for the current period. To determine whether time reporters are entering time for the current period or a prior one, the system looks at the current date for which time reporters are reporting time, and compares this date to the current period start and end dates on the Time Period Calendar. The system first looks for a time period on the Maintain Time Reporter Data Page for the time reporter, and if one is not defined there, will use the time period on the workgroup to distinguish current from prior period time.



For more information on prior period processing, see *Understanding Batch Processing in Time Administration*.

Defining Periods and Period Instances

To create time periods you need to follow these steps:

To Define a Period

1. Define the different period types you will use for time reporting, tracking attendance, or processing rules.

There are five (5) time period types:

- Daily (daily periods are defined on the Daily Time Period Page)
- Weekly (weekly periods are defined on the Weekly Time Period Page)
- Monthly (monthly periods are defined on the Monthly Time Period Page)
- Repeating (repeating periods are defined on the Repeating Time Period Page)
- Complex (complex periods are defined on the Complex Time Period Page)



Each time you create a time period using one of the time period pages described in this section, the system generates a Time Period ID. This ID uniquely identifies the time period you've defined.

All time period definitions include the period length (for example, you could define a weekly period to have a length of one week, two weeks, and so on) and the frequency of the time

period. We have kept the definition of time and frequency separate from the time period calendar to make reusing time periods easy and to provide maximum flexibility during setup. Below are examples of time and frequency data that can be defined for a time period:

<i>Begin Date</i>	<i>End Date</i>	<i>Frequency</i>
1 July	1 July	Daily
1 July	7 July	Weekly
1 July	30 July	Monthly
1 July	15 July	Semi-Monthly
1 July	31 September	Quarterly

2. Generate Period Instances

Once you have defined your time periods, you must generate actual “instances” of these periods on a calendar through a batch process known as the Build Time Period Calendar Process. For example, let’s say you have defined a weekly period for reporting time, and specified that the week begins on Monday and ends on Sunday. This period exists only in “theory” until you’ve generated instances of it on a calendar. To create periods based on your period definition, you’ll need to define the start and end dates of your calendar (for example, 1 February 2000 to 1 February 2001), and specify the period types that you want to include in your calendar (daily, weekly, monthly, and so on). You’ll then generate actual periods by running the Build Time Period Calendar Process.



For more information on how to build actual instances of a period, see Building Calendars.

3. Define Additional Components

Once you’ve defined your time periods, you’ll use them to define additional components of the Time and Labor system:

<i>Time Periods Used in the Definition of:</i>	<i>Where Used:</i>
Workgroups	If the period you define is a time reporting period, you must link the period--via its Time Period ID--to a workgroup on the Workgroup Page. You can also enter a time reporting period for individual time reporters on the Maintain Time Reporter Data Page—if you do so, this period ID overrides the reporting period associated with the time reporter’s workgroup.

<i>Time Periods Used in the Definition of:</i>	<i>Where Used:</i>
Rules	If the period is used to define a time segment for rules processing, you must link it--via its Time Period ID-- to the rule on the Define Rule Header Page.
Attendance Tracking	If the period you define is an attendance-tracking period, you must link it--via its Time Period ID--to the definition of the attendance program on the Attendance Program Page.

Daily Time Period Page

Usage	The Daily Time Period page allows you to establish a fixed day-type period when building time period calendars.
Object Name	TL_FIXED_DAY_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Time Period -- Day
Prerequisites	None.
Access Requirements	Enter Time Period ID.

Daily Time Period

Time Period ID: PSDAY

Description: Day Time Period - PS Delivered
Short Description: PS Day

Period Definition

Period length in Days: 1
Start Offset from Period End: 1

Daily Time Period page

The following fields are common to multiple Pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description.**

Time Period ID

The system displays the Time Period ID you entered to access the page.

Period Definition

Period Length in Days

Enter the number of days in the period. The default is 1.

Start Offset from Period End

Enter the number of offset days in the **Start Offset from Period End**. Offset days are used to derive the start date of the next period instance with respect to the end date of previous instance. Offsets can be positive or negative. The default for offset days is 1.

Note. The only day-type periods you can enter on the Workgroup and Maintain Time Reporter pages are those with offset days = 1.

- If the offset is a positive number, the next period instance starts the number of offset days you specify from the end date of the previous instance. For example, using a value of 1 as your offset, the next period starts 1 day after the end date of the prior period instance:

Original End Date of the First Period	New Instance Start Date for Next Period
24 January 2000	25 January 2000

- If the offset is a negative number, the system counts back the number of offset days you specify from the end of the earlier period instance to determine the start of the next period instance. Any two consecutive period instances will overlap if offset days is negative. However the absolute value of offset days cannot be equal to or greater than the period length. In other words, when the offset days value is negative, the next period cannot start on or before the current period.

To avoid creating a period with an offset equal to or greater than the period length, you should observe the following rule: *the maximum number of negative offset days cannot be greater than the period length minus two (period length – 2). An offset equal to the period length minus 2 automatically creates a period beginning one day after the start of the prior period instance.* So, for example, if your Period Length in Days = 7, and you set your negative offset to 5 (7 days – 2), your next period would begin exactly one day after the start of the earlier period. If you set your negative offset to 6, however, you will exceed the maximum number of offset days and set the start of the new period equal to the start of the prior period.

Let's expand on this example to help clarify how you can use offsets. Let's say that the current 7-day period in our example begins on 3 January and ends on 9 January. Using the value of –5 as your offset (7 days – 2), the next period starts 1 day after the start of the earlier period instance:

Begin and End Dates of the First Period	Begin and End Dates of the Next Period
3 January—9 January 2000	4 January—10 January 2000

If you set your offset to -4, the next period instance would begin 2 days after the start of the prior period instance:

<i>Begin and End Dates of the First Period</i>	<i>Begin and End Dates of the Next Period</i>
3 January—9 January 2000	5 January—11 January 2000

And if you set your offset to -3, the next period instance would begin 3 days after the start of the prior period instance.

<i>Begin and End Dates of the First Period</i>	<i>Begin and End Dates of the Next Period</i>
3 January—9 January 2000	6 January—12 January 2000

- Now let's look at a final example illustrating how you would create a rolling period with a negative offset:

The screenshot shows the 'Daily Time Period' configuration page. At the top, it says 'Daily Time Period' with a dropdown arrow. Below that, 'Time Period ID:' is set to '90DAYROLLING'. There are two input fields: 'Description:' with the value '90 Day Rolling' and 'Short Description:' with the value '90 Day Rol'. Below these is a section titled 'Period Definition' with a light green background. Inside this section, 'Period length in Days:' is set to '90' and 'Start Offset from Period End:' is set to '-88'.

Daily Time Period page

This page illustrates how to define the offset to create a 90-day rolling period. Note that to create a rolling period, the **Start Offset for Period End** should be 2 less than the length of the rolling period ($90 - 2 = 88$). If you attempt to enter a **Start Offset for Period End** of -89, the system will generate the following error message when you save the page: “Invalid Value for Offset.” This is because the system uses the offset to count backwards beginning with the day just prior to the end date of the first period to start the new period instance. For example, if your first instance of time were from 1 January 2000 to 30 March 2000, when you subtract 89 days from that, the system begins subtracting from 29 March, which would bring you back to 1 January. To be a rolling period, the next instance of time should begin one day after the first period instance.

If we build a calendar for the 90 day rolling period from 1 January 2000 to 31 December 2000, the partial results for January 2000 on the View Time Period Calendar Page would look like this:

01/23/2000	04/21/2000
01/22/2000	04/20/2000
01/21/2000	04/19/2000
01/20/2000	04/18/2000
01/19/2000	04/17/2000
01/18/2000	04/16/2000
01/17/2000	04/15/2000
01/16/2000	04/14/2000
01/15/2000	04/13/2000
01/14/2000	04/12/2000
01/13/2000	04/11/2000
01/12/2000	04/10/2000
01/11/2000	04/09/2000
01/10/2000	04/08/2000
01/09/2000	04/07/2000
01/08/2000	04/06/2000
01/07/2000	04/05/2000
01/06/2000	04/04/2000
01/05/2000	04/03/2000
01/04/2000	04/02/2000
01/03/2000	04/01/2000
01/02/2000	03/31/2000
01/01/2000	03/30/2000

Weekly Time Period Page

Usage	The Weekly Time Period page allows you to establish weekly periods of time when building time period calendars.
Object Name	TL_FIXED_WEEK_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Time Period -- Week
Prerequisites	None.
Access Requirements	Enter a Time Period ID.

Weekly Time Period

Time Period ID: PSWEEK

Description: Weekly Period - PS Delivered

Short Description: PS Week

Period Definition

Period Length in Weeks: 1

Start Day of Week

☐ Sunday
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Weekly Time Period page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description and Short Description.**

Time Period ID The system displays the Time Period ID you entered to access the page.

Period Definition

Period Length in Weeks Enter the period length in weeks. The default number is 1 week. The maximum number is 99.

Start Day of Week Select a day out of the week (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday).

Monthly Time Period Page

Usage	The Monthly Time Period page allows you to establish monthly periods of time when building a time period calendar.
Object Name	TL_FIXED_MNTH_PNL
Navigation	Define Business Rules, Time and Labor, Setup 1, Time Period – Month
Prerequisites	None.
Access Requirements	Enter Time Period ID.

Monthly Time Period

Time Period ID: PSMONTH

Description: Month Period - PS Delivered
Short Description: PS Month

Period Definition

☐ Semi-month
☒ Month
☐ Quarter

☐ Semi-year
☐ Year
☐ User Defined

Period length in Months 1

Monthly Time Period page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description.**

Time Period ID The system displays the Time Period ID you entered to access the page.

Period Definition

Semi-month Select semi-month if you want the period length to be 15 days.

Semi-year Select semi-year if you want your period length to be 6 months.

Month Select month if you want the period length to be a full month.

Year Select year if you want your period length to be 12 months.

Quarter Select quarter if you want your period length to be 3 months.

User Defined If you select **User Defined**, the **Period Length in Months** field becomes available. Enter the length of the period in months. The maximum number of months you can enter is 999, and the minimum number is 1.



When you define a type other than a user defined month period, the system displays the number of days contained within the period.

Complex Time Period Page

Usage	The Complex Time Period page allows you to establish complex periods of time when building a time period calendar. Use this page for complex periods that cannot be defined using any other period definition.
Object Name	TL_COMPLEX_PNL
Navigation	Go, Define Business Rules, Define Time and Labor, Setup 1, Time Period – Complex
Prerequisites	None.
Access Requirements	Enter Time Period ID.

Complex Time Period page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Time Period ID

The system displays the Time Period ID you entered to access the page.

Period Definition**Start Date**

Enter the start date for your time period. You may select a date from the calendar by using the drop-down arrow. The system uses this date to determine the beginning of the period you are defining.

End Date

Enter the end date for your time period. You may select a date from the calendar by using the drop-down arrow. The system uses this date to determine the end of the period you are defining.



Complex periods are not created through the standard calendar build process—instead, they are created manually when you define the period on this page.

Repeating Time Period Page

Usage	The Repeating Time Period page allows you to establish repeating periods of time when building a time period calendar.
Object Name	TL_REPEATING_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Time

	Period – Repeating
Prerequisites	None.
Access Requirements	Enter Time Period ID and Description.

Repeating Time Period page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Time Period ID

The system displays the Time Period ID you entered to access the Page.

Period Definition**Period starts on**

Repeating Periods can be defined in any number of ways. The options are unlimited. To define a repeating period, follow these steps:

1) In the **Period Starts on Field**, enter either a number from *1* through *31* or the designation *Last*, and then a day of the week (*Monday* through *Sunday*) or the term *Day*. For example: *Last Sunday*.

2) In the **Of** field enter *Every* or *Every Other*. For example: Last Sunday **Of Every...**

3) Select **Month** or **Week** from the next drop-down list to complete the definition of your period. For example: Last Sunday of Every **Month**.

4) Finally, enter the duration of the period in the **Period Length in days** field. If you were to enter **2** in this field, the repeating period in this example would last two days beginning with the last day of the month.

To ensure that you have the expected results, check the time period calendar by selecting the View Time Period Calendar Page after you have built the period via the Build Time Period Calendar process.

Period Length in Days

Enter the number of days in your period. The maximum you can enter is 999.

Building Calendars

Once you have defined your time periods, you must launch the Build TL Calendar process to create instances of these periods for a week, month, or year(s), depending on your requirements. The Build Time Period Calendar process:

- Builds time period calendars using the start and end dates you specify. (These dates do not have to correspond to pay period begin and end dates, but can if you want).
- Enables you to select the time periods to be included in the calendar build process.
- Provides you with the option to rebuild calendars if you want to change or delete your time period definitions.
- Enables you to update an existing calendar if you want to expand (or contract) the calendar range (that is, if you want to change the start and end dates of the calendar while preserving existing time period definitions).

Defining your Calendar

Before running the calendar build process, you must define the start and end dates of the calendar that will include the periods you defined earlier using the period definition pages. You will also need to specify the Period Types or Period ID's that you want to include in (or exclude from) your calendar build. For example, when you build your calendar you could use all the period types you have defined, or just one specific period. To do this, you'll use the Build Time Period Calendar page.

Build Time Period Calendar Page

Usage	The Build Time Period Calendar page allows you to create instances of a time and labor calendar that will include each of your period start and end dates.
Object Name	TL_RCTRL_CAL_PNL
Navigation	Define Business Rules, Define Time and Labor, Process, Build Time Period Calendar
Prerequisites	None.
Access Requirements	Enter a Run Control ID.

Build Time Period Calendar page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Start Date, End Date, Report List, Process Monitor, Process Request.**

Run Control ID

This field displays the Run Control ID you entered to access the Build Time Period Calendar page.

Start Date

The **Start Date** field defaults to the current date. You can reset this date if you want.

End Date

The **End Date** defaults to the end of the current year. You can override the default date if you want.

Calendar Build Scope

Select a **Calendar Build Scope** type. The scope enables you to include or exclude specific periods and/or period types from the calendar build process. Valid values are:

Ad Hoc list of Periods. Select this option to indicate which periods you want to use on an ad hoc basis. When this is selected, the Time Period ID becomes available for entry. Add more periods by inserting additional rows in the Time Period ID section.

All Except One Period Type. Select this field to choose all periods except for one period type. The system uses all time period types entered except the one you choose to exclude. When this field is selected, the Period Type becomes available for entry.

All Time Period Types. Select this field to choose all time period types. The system uses all time periods entered. The time period type and Time Period ID are not available for entry or displayed.

Single Period Type. Select this option if you want your calendar to include only one time period type. When this field is selected, the Period Type becomes available for entry. You can choose from Day, Week, Month, or Repeating Types.



Complex period types are never included in the calendar build scope. This is because the calendar build process does not generate complex period instances. They are created manually when you define a complex period on the Complex Time Period Page.

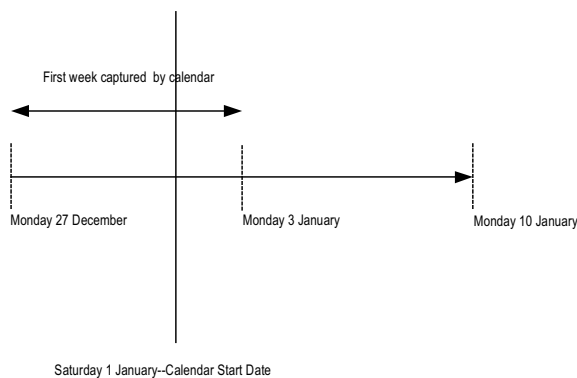
Override Indicator

Select this option to enable the system to override any existing calendar with a new one containing different or redefined periods. If the **Override Indicator** is not selected, the system will leave any existing period instances you may have built in place and allow you to insert new ones by modifying the calendar build scope. This enables you to update the calendar created by the system during the build process without recreating the entire calendar from scratch. By default, the **Override Indicator** is checked on.

Note. If you change the definition of an existing period--for example, you change the start date of a weekly period from Sunday to Monday--you will need to set the Override Indicator to "On" and build a new calendar. It is important to understand that redefining a period used in rules processing will trigger Referential Integrity and cause payable time to be reevaluated. Therefore, if the time period you rebuild alters the period instances used in a rule, any reported or payable time affected by the change will be recalculated in Time Administration. If Payable Time that has been frozen is affected, Time Administration will create offsets for the changes.

Use prior week start day

This check box applies only to weekly time periods, and allows you to reset the calendar start date in cases where the start date bisects a period instance. For example, let's assume your calendar **Start Date** is **1 January 2000**. You've defined a weekly period that begins on Monday. 1 January falls on a Saturday, which means that the week overlaps the start date. This is illustrated below:



Using the Prior Week Start Day

In the diagram above, the first weekly period captured by the calendar begins Monday 27 December—4 days before the calendar start date. In this situation, you need to specify whether the calendar should begin on the Monday before the specified Calendar start date, or on the first Monday that falls within the calendar period. If you select **Use Prior Week Start Day**, the calendar will begin before the initially specified start date (on 27 December in this example). If the **Use Prior Week Start Day** check box is unchecked, then the following Monday is used (3 January in this example).



You do not have to build your time period calendar at this time. You can set up the rest of your time and labor system (workgroups and taskgroups), then build your time period calendar. The Time Period calendar needs to be built prior to reporting time, running Time Administration, or tracking attendance.

General Rules for Building and Rebuilding Calendars

Override Indicator Set to OFF

- If you rebuild your calendar with the Override Indicator set to OFF, and there are period instances already existing within the start and end dates of the calendar, the system will not alter (delete or change) the existing period instances within these dates. If you create new time periods, they will simply be added to the existing ones.



If you want to change the definition of an existing period, you must set the Override Indicator to ON and rebuild the entire calendar using the new period definition.

- If you want to preserve your current period definitions, but want to change the start and end dates of the calendar, you can set the Override Indicator to OFF, change the begin and end dates, and rerun the Calendar Build Process:
 - If the new start and end dates fall within or are equal to the old dates, the system does not need to build out new period instances.
 - If the new start date is less than the first calendar's start date, and the end date is the same as or less than the first calendar's start date, new period instance will be built backwards in time beginning with the old start date.

Example:

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: 15 December 1999 – 31 December 2000

In this example the end dates are the same. However, the start dates are different: the new start date is 15 December 1999, while the old start date is 1 January 2000. So when you run

the Time and Labor Build Calendar Process, the system will create new period instances from 31 December 1999 to 15 December 1999.

- Similarly, if the new end date is later than the old end date, and the new start date is the same as or greater than the old start date, the system will start building new period instances going forward from the last end date.

Example:

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: 1 January 2000 – 15 February 2001

In this example the start date are the same. However, the end dates are different: the new end date is 15 February 2001 while the old end date is 31 December 2000. So, when you run the Time and Labor Build Calendar Process, the system will start creating new period instances moving forward from the old end date.

- If both the new start and end dates are outside the range of the old start and end dates, the system will generate new period instances. It will move backwards from the old start date until it reaches the new start date, and forward from the old end date until it reaches the new end date.

Example:

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: December 15 1999 – 15 February 2001

In this example the new calendar expands the date range of the old calendar in two directions. So, when you run the Time and Labor Build Calendar Process, the system will create new periods going backwards from 31 December 1999 to 15 December 1999, and forwards from 1 January 2001 to 15 February 20001.



Note. In the case of daily, weekly and monthly period types, if the Override Indicator is “Off,” the system does not touch existing records. But in the case of repeating periods, records are always deleted irrespective of the value of the Override Indicator.



Because complex periods are not created through the standard calendar build process—they are created manually when you define the period on the Complex Time Period page—they must be manually extended or shortened if you want to change the start and end dates of these periods.

Override Indicator Set to ON

- If you rebuild a calendar with the Override Indicator set to ON, the system will delete all records from the new start date onwards and build the calendar over again as if no period instances existed for the new calendar period. No period instance for dates prior to the new start date will be touched.



In the case of daily, weekly, and monthly period types, if the Override Indicator is “ON,” the system will delete all the records from the new start date onwards. But in the case of repeating periods, records are always deleted irrespective of the value of the Override Indicator.



Note. Because complex periods are not created through the standard calendar build process—they are created manually when you define the period on the Complex Time Period page—they must be manually readjusted rather than “rebuilt” if you want to change the start and end dates of these periods.

Launching the Calendar Build Process

To launch the calendar build process, click on the **Run** button and schedule the process.



For more information about using the Process Scheduler to schedule a process, see your PeopleTools PeopleBook.

View Time Period Calendar Page

Usage	The View Time Period Calendar page allows you to view the time period instances for each calendar.
Object Name	TL_CALENDAR_VW_PNL
Navigation	Define Business Rules, Define Time and Labor, Inquire, View Time Period Calendar
Prerequisites	None.

Access Requirements	Enter Time Period ID and Period Type.

View Time Period Calendar

Time Period ID: PSWEEK **Description:** Weekly Period - PS Delivered

Period Type: Week

View All First 1-10 of 680 Last

Start Date	End Date
12/31/2007	01/06/2008
12/24/2007	12/30/2007
12/17/2007	12/23/2007
12/10/2007	12/16/2007
12/03/2007	12/09/2007
11/26/2007	12/02/2007
11/19/2007	11/25/2007
11/12/2007	11/18/2007
11/05/2007	11/11/2007
10/29/2007	11/04/2007

View Time Period Calendar page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Start Date**, **End Date**.

Time Period ID

Each time you create a time period using one of the time period pages described in this section, the system generates a **Time Period ID**. This ID uniquely identifies the time period you've defined.

Period Type

This is the period type corresponding to the Time Period ID displayed on the page. **Period Types** can be: 1) *Daily*, (2) *Weekly*, (3) *Monthly*, (4) *Complex*, and (5) *Repeating*.

Use the scroll arrows to move up and down the list of the Start and End dates in the Time and Labor View Page.

General Rules for Building Periods and Calendars

This section contains important information on how to build calendars to insure that:

- 1) The system defines the correct period of interest for rules processing.
- 2) The data in Payable Time is what you expect it to be.



Important! The information contained in this section assumes that you are familiar with the chapter on Batch Processing in Time Administration as well as the chapter on Creating Rules in Time Administration. If you are not familiar with the material on payable time and period of interest contained in these chapters, you should review these chapters before reading the following section.

Building Calendars

You should always build out calendars for the following time periods:

- The entire period for which you intend to report time.
- The entire span of time on which rules may be run.

In Time Administration, if there are gaps in time reporting periods or gaps in the calendar connected with a rule, the system may select a much greater period of interest than is needed, and the schedule resolve process may end up resolving a larger range of dates than is necessary. This can significantly reduce performance time. The following example will help to clarify this:



Remember, Time Administration determines the “period of interest” by looking at both the time reporting period—identified via the Time Period ID on the Workgroup--and the Time Period ID associated with each rule. The time reporting period establishes the “initial period of interest,” while the rule period helps to determine how far into the past (or into the future) beyond this “initial period” Time Administration may need to go to capture the data needed for rules processing. For more information on how the system determines the period of interest, see Understanding Batch Processing in Time Administration.

Example

In this example, assume that you have define a rule program containing a weekly rule and a biweekly rule with the following priority ranking:

Rules	Rule Priority	Periods
Rule 1	Priority 1	Weekly
Rule 2	Priority 2	Biweekly

Let’s also assume that you build out calendars for the following periods of time:

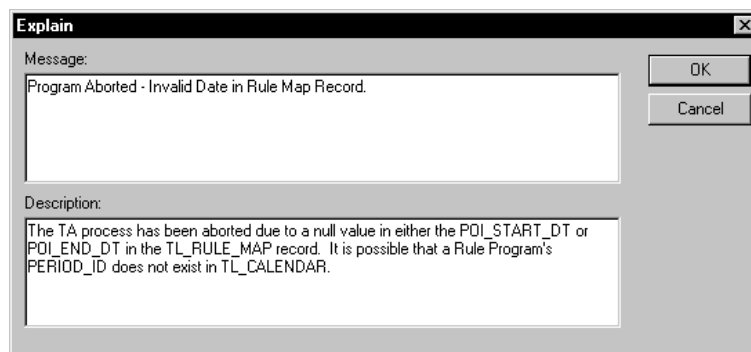
Calendar Builds for Each Period	
Weekly Period	Biweekly Period
2000	2000

Calendar Builds for Each Period	
2005	No Calendar Build for 2005
2006	2006

In this example, no calendar has been build for the biweekly rule in 2005. If you are processing rules for a period that ends on 7 January 2006 but starts 15 December 2005, you will end up extending your period of interest back to 2000, Rule Period 2 has not been built out for 2005, and both the weekly and biweekly rules must be run. If we assume you are processing a group of exception reporters, the schedule resolve process would resolve time all the way back to 2005 (since time for exception reporters is based on time schedules unless there is an exception to the schedule).



If you have not build out calendars for the periods used to determine the period of interest (the Period ID connected with the Workgroup and the Rule) you may receive the following message when running Time Administration:



In most cases when this message is reported, a Period Calendar has either not been built for a Period ID or the Calendar has not been built far enough into the past/future for all Period IDs associated with the time reporters being processed through Time Administration.

Building a Complete Calendar

To avoid the problems illustrated in this example, you should do the following:

1) Determine all of the Period ID's associated with the time reporters you plan to process through Time Administration. Period ID's are associated with:

- Workgroups
- Rules

2) Determine the maximum and minimum dates among the following dates:

- The Process Date on the Process Time Admin Page

- The DUR (date under report) in TL_RPTD_ELPTIME
- The PUNCH_DTTM in TL_RPTD_PCHTIME

3) Determine where the **minimum** date found in step #2 intersects the time reporting period for the workgroup you want to process. You'll need to build your calendar *at least* as far back into the past as the start of this period. And if this "minimum" date intersects a rule period belonging to a rule in the workgroup's rule program, and the rule requires time data from before the workgroup period, then you should build your calendar as far back into the past as the final period of interest start date.

4) Determine where the **maximum** date found in step #2 intersects the time reporting period for the workgroup you want to process. You'll need to build your calendar *at least* as far forward into the future as the end of this period. And if this "maximum" date intersects a rule period belonging to a rule in the workgroup's rule program, and the rule requires time data from days following the workgroup period, then you should build your calendar as far into the future as the end of the rule period.

Example:

Workgroup Period ID = PSWEEK (this workgroup is associated with a daily and a weekly rule)	
Min Date =	12 April 2005
Max Date =	20 May 2009

In this example, if you built the Period Calendar for PSWEEK from 1 January 2005 to 31 December 2009, you would be sure to capture all the data needed to process your rules.

Creating Payable Time

Payable Time is created through the interaction between time reporting periods, rule periods, and the schedule calendar. You should always compare your work schedule calendar to your workgroup and rule periods to make sure that the start and end dates of these periods are correct. If these periods are incorrect, you could end up creating Payable Time on different days than you expected. This is illustrated in the example below:

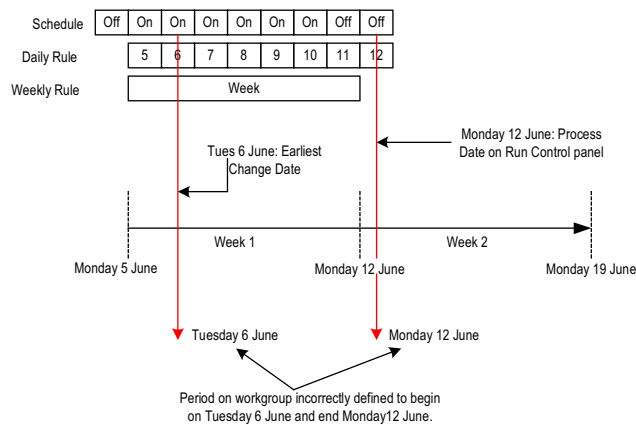


Important! This section assumes that you have a thorough understanding of how Time Administration creates Payable Time. If you are not familiar with the concept of Payable Time, you should review the chapter on Batch Processing in Time Administration before reading the following section.

Example

In this example, let's assume the following:

- You are processing a workgroup containing exception reporters.
- The workgroup period you are currently processing should specify a begin date of Monday 5 June and an end date of Sunday 11 June. By mistake, you have defined a Period ID for the workgroup that specifies a begin date of Tuesday 6 June and an end date of Monday 12 June.
- There are two rules defined for the workgroup—a daily rule and a weekly rule. The Period ID for the weekly rule specifies that the rule period begins on Monday 5 June and ends Sunday 11 June. The rule period is consequently out of synch with the Period ID on the workgroup.
- The Earliest Change Date is Tuesday 6 June.



Defining the Interaction of Time Reporting Periods, Rule Periods and Calendar Periods

In this example Time Administration passes all the dates from 6 to 12 June--the current workgroup period--to Payable Time. Assuming that the weekly rule in our example generates new time data for 5 June—a date just outside the current workgroup period—we end up with a Payable Time date range of 5 to 12 June. By contrast, the correct Period ID for the workgroup would have produced a Payable Time date range of Monday 5 June to Sunday 11 June. Note that the calendar schedule for these date ranges results in different data being sent to Payable Time. Using the “incorrect” time reporting period, the schedule indicates two days off. Using the “correct” time reporting period, the schedule indicates only one day off. As you can see, it is important to understand the relation between your time reporting periods, your rule periods, and the schedule calendar, since they all work together to create Payable Time.

Establishing Comp Time Plans

PeopleSoft Time and Labor enables you to define one or several Compensatory Time (Comp Time) Off Plans. Comp time plans provide you the ability to administer your time off in lieu of pay needs. Unlike other leave accruals where PeopleSoft Time and Labor uses the employee's leave balance records maintained in PeopleSoft Benefits to determine leave availability, Comp

Time is administered entirely within PeopleSoft Time and Labor. The system maintains each instance of a Time Reporter's comp time earned along with the quantity and date earned. This gives you the ability to set expiration periods for individual instances of comp time earned if that is part of your organization's business requirement.

For example, you may have one comp time plan for overtime and another comp time plan for meeting or exceeding a particular deadline. You can establish as many different plans as your organization requires and you can assign a time reporter to one or more comp time plans. When comp time is entered, the system adds to or deducts from a time reporter's comp time balance according to the rules you have established. If the time entered is within allowed limits, the balance is adjusted and maintained automatically. You do not have to manually change employee's comp time balances.

Time Administration processes comp time plans during post-rules processing, which occur after rules have been run.



For more information about Time Administration processing, see Understanding Batch Processing in Time Administration.



You'll administer compensatory time off exclusively within PeopleSoft Time and Labor; no similar function exists in other components of PeopleSoft HRMS.

Comp Time Plan Page

Usage	Use the Compensatory Time Off Plan Page to set up comp time plans for time reporters.
Object Name	TL_COMP_TIME_PLAN
Navigation	Define Business Rules, Define Time and Labor, Setup1, Compensatory Time Off Plan
Prerequisites	None.
Access Requirements	Enter a Compensatory Time Off Plan name.

Comp Time Plan

Compensatory Time Off Plan: KUCTOP3

View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: All Options - Executive Plan Short Description: Comp Plan3

*Expiration Period: Never

☐ Limit Positive Comp Hours

☒ Allow Negative Comp Hours Max Negative Hours Allowed: 9999

Valid TRCs First 1-2 of 2 Last

*Time Reporting Code:	*Status:	Effect on Comp Plan:
KUCE3 Hosp Comp Time Earned	Active	CT Earned
KUCT3 Hosp Comp Time Taken Plan	Active	CT Taken

Comp Time Plan page (Compensatory Time Plan page)

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.



Note. Adding, deleting, or updating a row in the Compensatory Time table triggers Referential Integrity processing. Referential Integrity ensures that if changes to the compensatory time off plan have invalidated unpaid comp time, the time will be reevaluated and the balance updated accordingly.



For more information about Referential Integrity, see Referential Integrity.

Compensatory Time Off Plan

The system displays the value you entered to access the page.

Expiration Period

Enter a unit of measure. Valid options include: **Days**, **Months**, **Years**, **Never**. If you select **Never**, the **Number** field will be unavailable for entry. If you select any other value, you will enter a value in the next field.

Number

If you selected an option other than **Never** in the **Expiration Period** field, this field becomes available for entry. Enter a number of units—the number of days, months, or years that the comp time is valid before expiry. This field defaults to a value of 9999.

Limit Positive Comp Hours
(limit positive compensatory hours)

To limit the number of positive comp time hours that a time reporter can accrue, select this check box and fill in the **Max Positive Hours Allowed** field. If you do not select this option, the **Max Positive Hours Allowed** field will be unavailable for entry.

Max Positive Hours Allowed (maximum positive hours allowed)

If you selected the **Limit Positive Comp Hours** check box, this field becomes available for entry. Enter the maximum number of comp time hours a time reporter can accrue.

Allow Negative Comp Hrs
(allow negative compensation hours)

To permit time reporters to have a negative comp time hours balance (use more comp time than they have accrued), select this check box and fill in the **Max Negative Hours Allowed** field. If you do not select this check box, the **Max Negative Hours Allowed** field will be unavailable for entry.

Max Negative Hours Allowed (maximum negative hours allowed)

If you selected the **Allow Negative Comp Hrs** check box, this field becomes available for entry. Enter the maximum negative hours of comp time a time reporter can take.

Valid TRCs

Each comp time plan is linked to one or more TRCs. You can add rows as necessary. If you assign more than one comp time plan to a time reporter and the comp time plans share one or more TRCs, the system will create an error. For example, a Time Reporter has plan A and you want to add plan B. Plan A contains TRCs REG and OVR. Plan B contains TRCs SPE and OVR. When you try to add Plan B, the system will create an error. The uniqueness of the TRCs per comp time plan is important when a time reporter has more than one plan, so the system can recognize which plan's balance is affected.

Time Reporting Code

Enter TRCs that are valid for this comp time plan. Some TRCs represent time comp time earned, other represent comp time taken.

Status

Select the appropriate status for this TRC.

Effect on Comp Plan (effect on compensatory plan)

The system displays the TRC's effect on the comp time plan (which you defined when you created the TRC) in this field. Valid values include: *comp time earned*, *comp time taken*.



For more information about time reporting codes, see Establishing Time Reporting Codes.

Establishing Exceptions

Exceptions are user and system-defined warnings and errors to indicate a problem with a time reporter's time, or a problem in the system. Exceptions are tied to the Time and Labor message sets in the Message Catalog. Defining your own exception conditions gives you control over time reporting messages and warnings. You can keep an audit trail on resolved exceptions for problems such as how many times an employee is tardy, etc. If you choose to have the exception archived, you can run a query on resolved exceptions to track trends of recurring exceptions. By making exceptions allowable, you can track low severity exceptions and the system will create payable time without the need to make changes to reported time.

The system creates exceptions based on rules, which are defined in Time Administration, or errors that have been generated as a result of reporting time (specifically in the Time Validation process).

Almost all of the system-delivered exceptions have an exception severity of **High** and are defined as **Not Allowable**. These exceptions must be resolved before the Time Administration process creates payable time. You can change the severity and the allowable flag for system delivered exceptions.

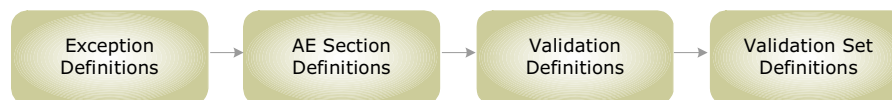
Exceptions that begin with *TLX* work in conjunction with attendance tracking and validations we deliver. The exceptions for Attendance Tracking are of a Low Severity, whereas the exceptions for Validation are of High Severity. These include validations for task reporting, time reporting codes, comp and leave time validations and time reporter status validations.

The system-delivered validation set is called ST_ALL. If you don't want to have all the validations in this set run during processing, you can create your own validation set and define which validation definitions you want to include.

Establishing exceptions is the first part of setting up validation criteria so that the Time Validation process can generate exceptions correctly. You also need to set up AE sections and validation definitions in order for the system to generate exceptions through the Submit Time process. Validation definitions tie the SQL and exception information together to provide the system with a reference and a way to execute exceptions.

The following process flow illustrates the areas that need to be set up so that exceptions can be generated and validations performed during processing.

Validation Setup Flow



Validation Setup Flow



For more information about validating time see Understanding Validating Time in this PeopleBook.

If you plan to establish user-defined exceptions, you must first set up Time and Labor messages in the message catalog using PeopleTools.



For more information about using the message catalog and message sets, see your PeopleTools PeopleBook.

Define Exception Page

Usage	Use this Page to establish exception criteria and assign message numbers.
Object Name	TL_DEFINE_EXCEPTION
Navigation	Define Business Rules, Define Time and Labor Rules, Setup 2, Exception
Prerequisites	Message Catalog, Setup Message Set Number and Message Number
Access Requirements	Enter an exception ID.

Exception Id: TLX00070

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Task Profile not in Taskgroup Short Description: Task Profi

Exception Severity: ☒ High ☐ Medium ☐ Low

Exception Controls: Allowable ☐ Archive Exception ☐

Message Data

Message Set Number: 13508 TL Validations and Exceptions

Message Number: 14 The reported Task Profile: %1 is not associated to the

Define Exception Page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, **Short Description**.

Exception Severity

Exception severity communicates the severity of the exception during the Manage Time process. It helps determine whether time for the day will be processed by the Time Administration process to create payable time.

High

Select this option if you want the exception to have a high priority. If this is a system-defined exception, this is the default, which you can change. The Time Administration process ignores all high-severity exceptions that are unresolved and not allowed, when calculating payable time. The system will create payable time for these exceptions after they have been resolved or, if possible, allowed.

Medium

Select this option if you want the exception to have a medium priority. The Time Administration process ignores all medium-severity exceptions that are unresolved and not allowed when calculating payable time.

Low

Select this option if you want the exception to have a low priority. The Time Administration process will create payable time for low severity exceptions.

Exception Controls

Allowable

Select this check box if you don't want this exception to prevent the creation of payable time without resolving it during the Manage Time processes. If this is a system-defined exception, the default is cleared. An exception that is allowable doesn't stop time from being processed by the Time Administration process. Leave this check box cleared, which equals ***Not Allowable***, if you want the time manager to resolve the exception, by adjusting reported time or fixing the error in the setup pages, before it can become payable. This check box will control the display of your exceptions under Manage Exceptions. The Allow check box will only appear if you define this exception as Allowable.

Archive Exception

Select this check box if you want this exception to be used for history purposes. For example, you may want the system to keep exceptions to track information about how many times an employee is late. If this is a system-defined exception, the default is cleared.

Leave this check box cleared, which equals *Don't Archive*, if you don't want the exception to appear on the Exceptions History page after it is resolved using the Manage Exceptions page. If you allow the exception using the Manage Exceptions page, then the exception will also appear on the Exceptions History page.

Message Data**Message Set Number**

Select a number from the Message Set drop-down list to establish the message set that will be associated with the exception. These values are delivered with the system, or are user-defined.

Message Number

Select the number of the actual message you want to describe the exception when generated by the Time Administration process. These messages are delivered with the system, or are user-defined.



For more information about Managing Exceptions, see Managing Exceptions.

Defining Application Engine Sections

After you've defined exceptions, you define your AE (application engine) sections. Application Engine (AE) is a feature of PeopleTools that allows you to write software to perform SQL and PeopleCode processing against the data. An AE program is composed of one or more AE sections. Each AE section typically does one discrete piece of work and is akin to a sub-routine, paragraph, procedure or function in a more traditional programming language. AE sections can include referential integrity or validation processing. For each AE section you create, you'll specify which kind of processing should occur.



For more information about defining exceptions, see Establishing Exceptions. For more information about application engine sections, see your Application Engine in your PeopleTools documentation.

AE Section Page

Usage	Use the AE Section Definition Page to specify whether an AE section is a referential integrity section or a validation section.
Object Name	TL_AE_SECTION_DEFN
Navigation	Define Business Rules, Define Time and Labor Rules, Setup 2, AE Section Definition.
Prerequisites	None.
Access Requirements	Enter a Section name.

AE Section page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description, Comment.**

- Section** The value in this field corresponds to the value you entered to access the AE Section Definition Page.
- Program Name** Enter the name of the AE program in which this AE section is included.
- Process Type** Select the operation that you want the system to perform. Valid values include:
- Referential Integrity.*** Select this option if you want this AE section to perform referential integrity processing.
- Validation.*** Select this option if you want this AE section to perform validation processing.

Rule (User Exit). Select this option if you want to use a user exit.



For more information about Referential Integrity, see Referential Integrity. For more information about validation processing, see Understanding Validating Time. For more information about user exits, see User Exits.

Defining Validation Criteria

For the validation process, the system must determine the validations to be processed and retrieve the related AE section names. Each validation definition specifies the AE section name that implements the validation. PeopleSoft some validations for your use. The PeopleSoft-delivered validations have prefixes TLX and ABS.

The system-delivered validation set is called ST_ALL. If you don't want all the validations in this set to run during processing, you can create validation sets—smaller groups of validations—in which you can specify which validations you want the system to process.

Control is then returned to the Process Validations function upon completion and the next AE Section (if there are more to process) is called.



For more information about Application Engine sections, see Defining Application Engine Sections.

Define Validation Page

Usage	Use the Validation Definition Page to define your validation ID.
Object Name	TL_VALID_DEFN_PNL
Navigation	Define Business Rules, Define Time and Labor Rules, Setup 2, Validation Definition.
Prerequisites	None.
Access Requirements	Enter a Validation ID.

Define Validation

Validation ID: TLX00001 PeopleSoft Delivered: Y

Validation Definition

Description: Invalid Comp Time TRC/Balance Short Description: Invalid Co

Validation AE Section: CT00100

Exception Id: TLX00001 Invalid Comp Time TRC/Balance

Comment: Verify that
1. the Reported Comp Time TRC is valid

Define Validation page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**, **Comment**.

Validation ID	This field displays the value you entered to access the page.
PeopleSoft Delivered	If this Validation is delivered by PeopleSoft, the system displays a “Y” in this field. If you are creating your own Validation, the system displays a “N” in this field.
RI AE Section (referential integrity application engine section)	Select the referential integrity AE section that should correspond to this validation.
Validation AE Section (application engine section)	Select the validation AE section that should correspond to this validation.
Exception Id	Select the exception ID that should correspond to this validation. Generally, there will be a one-to-one correlation between exceptions and validations, but it is possible for several validations to trigger the same exception. There will never be more than one exception per validation.



For more information about application engine sections, see Defining Application Engine Sections. For more information about Referential Integrity, see Referential Integrity. For more information about defining exceptions, see Establishing Exceptions.

Validation Set Page

Usage	Use the Validation Set Definition Page to group validation IDs.

Object Name	TL_VALID_SET_PNL
Navigation	Define Business Rules, Define Time and Labor Rules, Setup 2, Validation Set Definition.
Prerequisites	None.
Access Requirements	Enter a validation set.

Validation Set

Validation Set: ST_ALL
PeopleSoft Delivered: Y

Validation Set Definition

Description: All Time Reporting Validations
Short Description: Validation

Comment:

All Validation Definitions
View All
First
1-30 of 164
Last

Validation ID
Description

☐ TLX00001 Invalid Comp Time TRC/Balance
☐ TLX00010 Invalid Leave Time Taken
☐ TLX00030 Time Reporting Status Check
☐ TLX00040 Valid Taskgroup
☐ TLX00050 Active Taskgroup
☐ TLX00060 Valid Task Profile ID
☐ TLX00070 Task Prof in Default Tskgrp
☐ TLX00080 Task Prof in Borrowed Tskgrp

Validation Definitions for ST_ALL
View All
First
1-30 of 164
Last

Validation ID
Description

☐ TLX00001 Invalid Comp Time TRC/Balance
☐ TLX00010 Invalid Leave Time Taken
☐ TLX00030 Time Reporting Status Check
☐ TLX00040 Valid Taskgroup
☐ TLX00050 Active Taskgroup
☐ TLX00060 Valid Task Profile ID
☐ TLX00070 Task Prof in Default Tskgrp
☐ TLX00080 Task Prof in Borrowed Tskgrp

Validation Set page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description, Comment.**

Validation Set

The system displays the value you entered to access this page.

PeopleSoft Delivered

If this Validation is delivered by PeopleSoft, the system displays a “Y” in this field. If you are creating your own Validation, the system displays a “N” in this field.

All Validation Definitions

A list of all Validation IDs and descriptions is displayed in the grid. There are two ways to select which validations to include in a validation set. You can click **Select All** and the system will select the entire column of check boxes. Or, if you want to select particular validations that should appear in the list, you can manually select check boxes next to those validations that you wish to include in the validation set. At any time, you can use the **Clear** button to clear the entire column of check boxes (regardless of whether they were selected manually or via the **Select All** button).

When you have finished selecting validations you wish to include, click the >> **button** to transfer the selected validations to the validation set that you are creating.

Validation Definitions for ... (Validation Set name)

This grid represents the validations that you have chosen to include in the validation set. You can use the check boxes to remove validations from the validation set. After selecting the check boxes that correspond to the validations that you wish to remove from the validation set, click the **Delete** button to remove selected items.

Override Reason Code Page

Usage	Use the Override Reason Code page to establish codes for the reasons you may have reported or changed already reported time.
Object Name	TL_OVRD_RSN_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Override Reason Code
Prerequisites	None
Access Requirements	Override Reason Code label

Override Reason Code

Override Reason Code: KUIN2

*Description: TR in early - Shift Cover

Short Description: Shift Cover

Override Reason Code page

With PeopleSoft Time and Labor, you can enter any comments you wish along with any instance of reported time. When you enter the comments, you can also enter a Reason Code so that it will be easy for you to categorize the comments for reporting purposes. You use override reason codes for Rapid Time and Time Reporting Templates, and with Weekly Elapsed and Weekly Punch time.

Enter the appropriate **Short Description** and **Long Description** to establish your Override Reason Codes.

CHAPTER 3

Establishing Workgroups

A workgroup is a group of time reporters who share identical compensation requirements. For example, a workgroup may include all time reporters:

- In the same business enterprise.
- In the same pay group.
- In the same union or union local.
- At the same work location.

PeopleSoft Time and Labor uses workgroups to effectively administer the many factors affecting compensation. Each time reporter who reports time through PeopleSoft Time and Labor must belong to a workgroup. In addition, our Time Administration process applies rules by workgroup. A workgroup must be created before any process uses it.



For more information about Time Administration processing, see Understanding Batch Processing in Time Administration.

You define workgroups based on your organization's time reporting compensation requirements. You use the Workgroup page to establish the defaults, rounding options, and day breaker options for each workgroup. The system uses these defaults when processing time and sending updates to payroll. You also use this page to assign Time Reporting Codes and Rule Programs to the workgroups that are later used by the system to process time for your time reporters.

You can set up as many workgroups as needed, but you must set up at least one.

As you set up a workgroup, use this checklist to verify that all time reporters in the group meet the requirements for being in the same workgroup. Requirements for group members are as follows:

- They must have the same reporting type: Exception Time Reporting or Positive Time Reporting.
- They must have the same holiday schedule if you're going to control the holiday schedule at the workgroup level.

The system first checks for a holiday schedule on the JOB record and if no schedule is found there, it defaults to the workgroup schedule.

- They must share the same TRC Program (which is composed of Time Reporting Codes).
- If the workgroup is for exception reporters, they must share work schedules for creating payable time if the default work schedule is selected for the time reporter.
- They must use the same compensation rules and the same time period to assist in determining the period of interest for Time Administration.
- They may need to have their time approved by a manager; the approval requirement applies to everyone.
- They must share the same day breaker—the time used to determine when one day becomes the next.

The day breaker is used to determine the logical date of a punch.

- They must share similar rounding rules for rounding punch and elapsed time.
- They can share the same association to a Compensatory Time Off Plan.

Defining Workgroup Criteria

To set up your workgroup, you must specify the following criteria on the Workgroup page: Time Type, Compensation Controls, Workgroup Defaults, Rounding Options, and Daybreaker Options. By entering the correct values in these workgroup fields, you are defining your workgroup. The following table specifies the criteria and their descriptions:

Criteria	Description
Time Type	You specify the time reporting type you want the system to process for a workgroup. The two Time Types are Exception Time Reporting and Positive Time Reporting.
Compensation Controls	If you are using the Rule Program, TRC Program, or Holiday Schedule, you must select a compensation control. The Compensation Controls allow the system to validate the compensation criteria that is specific to your Rule Program, TRC Program, or Holiday Schedule setup.
Rounding Options	You must select Rounding Options based on your company's time reporting requirements. Selecting an option will ensure that the time the time reporters enter is properly rounded.
Workgroup Defaults	If you want your workgroup to default to a specific time period ID, schedule ID, holiday schedule, or compensatory time off plan, select a workgroup default type.
Day Breaker Options	You must enter your Day Breaker Options. These are used to determine when one day becomes the next, and enable the system to determine the logical date of a punch.

Workgroups and Referential Integrity

When you make a change to one area of the application, Referential Integrity makes sure that these changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or employee related data that could invalidate related objects or values in the system.

The following tables describe Referential Integrity actions that occur when certain changes, inactivations, or deletions are made to workgroup data.



For more information about the Referential Integrity feature within PeopleSoft Time and Labor, see Referential Integrity in this book.

Preventing Inactivation or Deletion of Effective-Dated Rows

Feature	Action
Workgroup	You cannot inactivate a workgroup if the workgroup is associated to a time reporter on the Create/Maintain Time Reporter Data pages.
	You cannot delete an effective dated row if the deletion invalidates an association to a time reporter on the Create/Maintain Time Reporter Data pages.

Execute Error Edit Checking

You cannot change the effective date of the target table to be greater than the effective date of the prompt table. This prevents an invalid association between the prompt value and the target table.

Target Table	Prompt Table
Workgroup	Rule Program ID
	TRC Program ID
	Compensatory Time Off Plan

Nested Effective Dates

You cannot change the effective date of the source table to be greater than the effective date of the target table. This ensures the validity of a value that acts as a prompt on another page.

Source Table	Target Table
Workgroup	Create/Maintain Time Reporter Data



For more information about how the system reacts when it encounters nested effective-dated tables, see Understanding Nested Effective-Dated Tables.

Workgroup Page

Usage	Use the Workgroup Setup Page to define defaults, approval options, rounding options, and day breaker options for a workgroup.
Object Name	TL_WRKGRP_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Workgroup
Prerequisites	TRC Program, Time Periods, Holiday Schedule, Comp Time Plan, and Schedule ID.
Access Requirements	Enter a Workgroup.

Workgroup

Workgroup: KUWRKGRP2

View All First 1 of 1 Last

*Effective Date: 01/01/1980 ☐ Needs Approval *Status: Active + -

*Description: Positive Time Rptg/Round Rules Short Description: Pos Rpt RR

Time Type ☐ Exception Time Reporting ☒ Positive Time Reporting	Compensation Controls Rule Program ID: KURULEPGM2 Rule Program 2 w/ Attend 2 *TRC Program ID: KUTP3 Basic TRC Prog 3 No Comp Time
Rounding Options ☐ Round Punches Before Rules ☒ Round Duration After Rules ☐ Segment ☒ Day Rounding Interval (Mins): 15 Rounding Marker (Mins): 7.50	Workgroup Defaults *Holiday Schedule: KU01 US Holiday Schedule Comp Plan: KUCTOP2 Allow Negative Hours/Expire *Time Period ID: PSWEEK Weekly Period - PS Delivered Schedule ID: KUSCHDFP2 Punch 10 Hour Day Definition
Day Breaker Options ☒ Begin Time Of Shift ☐ End Time Of Shift ☐ Majority Of Shift ☐ Split By Day Breaker *Day Breaker: 00:00	
Day Breaker Range ☒ Range Start Day ☐ Range End Day	

Workgroup page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, **Short Description**.



The following fields on this page trigger Referential Integrity: Needs Approval, Rule Program ID, TRC Program ID, Holiday Schedule, Comp Plan, Schedule ID, Day Breaker, Day Breaker Options, Day Breaker Range, Rounding Options (before and post-rules rounding), Rounding Interval, and Rounding Marker. For these fields, Referential Integrity ensures that if a time reporter's Earliest Change Date is less than the effective dated change of the setup table, the Earliest Change Date will not be updated. If, however, the Earliest Change Date is null or greater than the effective date of the setup table change, the Earliest Change Date will be updated to the minimum effective date of Reported or Payable Time for the time reporter.



For more information about Referential Integrity, see Referential Integrity and Workgroups and Referential Integrity. And for more information about the Earliest Change Date, see Understanding Batch Processing in Time Administration.

Needs Approval

Select this check box if a manager's approval is required before the time reporters in this workgroup can be paid. If this check box is selected and payable time is not approved by a manager, the time reporter will either not be paid or their time will not be finalized. Leave the check box clear if you do not want a manager to approve the time in order to be paid.

If you change the value of this checkbox after time has been reported, the Validation process checks for any affected reported time. Affected instances of time need to be rerun through Time Administration to generate and update the status of Payable Time to either *Needs Approval* or *Estimated* depending on the change you made. If the time reporter is recognized as not using any payroll system (based on the Send to Payroll flag on the Create/Maintain Time Reporter pages), the *Needs Approval* status needs to remain as the only method of closing the time.

For more information about the Payable Time status of *Needs Approval* and *Estimated*, see PeopleSoft 8 Time and Labor, "Understanding Payable Time" and PeopleSoft 8 Application Fundamentals for HRMS.

Status

Valid values for **Status** are *Active* or *Inactive*. If you change the status of a workgroup to *Inactive* as of a particular effective date, the system will check if any time reporter is associated with the workgroup as of that effective date. If the association exists, the inactivation of the Workgroup will not be allowed.

Defining a Time Type

Use the settings in this group box to indicate whether your workgroup contains exception time reporters or positive time reporters. If you change the Time Type for the workgroup from Positive to Exception, the effect is the ability to automatically create time for a given population by turning default schedule information into Payable Time. If you change from Exception to Positive, time cannot be created for time reporters based on schedules--all time needs to be positively reported. When you make a change to the Time Type, the next time Time Administration is run and it will take into account the new time type.

Exception Time Reporting

Select this option if time reporters in this workgroup do not report their time on a daily basis, but are paid regularly. Examples of exception time reporting are time reporters who only report sick, vacation, or personal days.

Note. We recommend that you enter Positive or Exception into your descriptions of each Workgroup so that you can more easily determine which Workgroup you want to assign your time reporters to on the Create or Maintain Time Reporter Data pages. It is important that you categorize your employees correctly, because Time Administration creates Payable Time differently for exception and positive time reporters.

For more information about how Time Administration creates Payable Time for exception and positive time reporters, see PeopleSoft 8 Time and Labor, "Understanding Batch Processing in Time Administration".

Positive Time Reporting

Select this option if you want the time reporters in this workgroup to report their time on a daily basis in order to be compensated. An example of positive time reporting is time reporters who report their time on an hourly basis.

Note. We recommend that you enter Positive or Exception into your descriptions of each Workgroup so that you can more easily determine which Workgroup you want to assign your time reporters to on the Create or Maintain TR Data panels. It is important that you categorize your employees correctly, because Time Administration creates Payable Time differently for exception and positive time reporters.

For more information about how Time Administration creates Payable Time for exception and positive time reporters, see PeopleSoft 8 Time and Labor, “Understanding Batch Processing in Time Administration”.

Defining Compensation Controls

Rule Program ID

Enter a **Rule Program ID** from the drop-down list box. To set up a rule program, you must use the Rule Program page. Although this field is not required when you create a workgroup, the **Rule Program ID** is needed in order for the time reporters in this group to have rules applied during Time Administration rules processing. If you try to save the page without entering a value in this field, you will get a warning message. The message will not prevent you from saving the page. You can save the page and come back to assign a **Rule Program ID** after you have your rule programs defined.

Note. If a time reporter reports time with a valid TRC, Time Administration will create payable time even if their workgroup has no rule program: Time Administration will round, distribute tasks, and validate time without running rules. If the TRC is invalid, the system will generate an exception. For elapsed time reporters, exceptions will be created for all positively reported time that doesn't have a valid TRC.

If you change the rule program attached to a workgroup, the Referential Integrity process will determine the Payable Time affected by this change, and trigger Time Administration to reprocess this time.

For more information about Payable Time, see PeopleSoft 8 Time and Labor, “Understanding Payable Time” and PeopleSoft 8 Application Fundamentals for HRMS. And For more information about Time Administration, see PeopleSoft 8 Time and Labor, “Understanding Batch Processing in Time Administration”.

TRC Program ID

Select a TRC Program ID from the drop-down list box. TRC programs contain the list of TRCs that the system uses to create payable time for time reporters belonging to this workgroup. When workgroup members report time through the Weekly Elapsed Time Entry page, only TRCs in this TRC program will appear in the **TRC** field.

If you try to change the TRC program attached to this workgroup, the Referential Integrity process will trigger Time Validation to check any reported or payable time that might be affected by this change. If there is any such time, the system creates exceptions and you will have to adjust the TRC to address the exceptions.

If time is reported through the TCD Interface or Rapid Entry process and contains invalid TRCs, the system will create exceptions for these instances of time. If the interface includes new TRCs that should be added, you can add the new TRCs to the appropriate TRC program. When you add the new TRCs, the system should delete the exceptions.

Specifying Workgroup Defaults**Time Period**

Select a Time Period from the drop-down list box. From a time reporting perspective, the system uses the time period on the Workgroup page to differentiate between time belonging to the current period and time that falls within a prior period.

Note. The only day-type periods you can enter in this field are periods with an offset of 1.

For more information about Time Period Ids and offsets, see Establishing Workgroups.

Schedule ID

Select a Schedule ID from the dropdown list. The system uses the value you designate here as the default schedule assignment for all time reporters in this workgroup.

If you are creating an “Exception” type workgroup, you must select a value in this field or the system cannot create payable time. If you are creating a “Positive” type workgroup, this field is optional.

All time reporters in this group do not have to use the default schedule assignment. You can assign other schedules to each time reporter on the Assign Schedules page. This default is only for convenience. You can assign the same **Schedule ID** to several workgroups.

If your time reporter is using the workgroup default **Schedule ID** and the **Schedule ID** is changed on the workgroup, the system deletes any Workday Overrides for that time reporter that are of a different type than the schedule assignment (i.e. Elapsed vs. Punch), and have a date greater than or equal to the new schedule assignment.

Changes to the workgroup **Schedule ID** will also trigger the Referential Integrity process. This means that any reported or payable time with a date greater than or equal to the date of the new assignment will be re-evaluated by Time Administration. This is to allow for any corrections that may be needed if payable time was created from schedules or rules were run against schedules.

For more information about schedules, see PeopleSoft 8 Time and Labor, “Defining Schedules”.

Holiday Schedule

Select a **Holiday Schedule** from the drop-down list box. PeopleSoft Time and Labor determines the holiday schedule by checking for the time reporter’s Job record first. If no holiday schedule is listed on the Job record, the system checks this field at the workgroup level.

If you change the holiday schedule associated with a workgroup, the Referential Integrity process will trigger Time Administration to process any time affected by the change in holiday schedule.

For more information about holiday schedules, see PeopleSoft 8 Time and Labor, “Defining Schedules”.

Compensatory Time Off Plan

If your organization tracks comp time, and you would like to associate time reporters with comp time plans at the workgroup level, select a **Compensatory Time Off Plan** from the drop-down list box. Compensatory time-off plans are associated with TRC programs, just like workgroups. The TRCs attached to your compensatory time off plan must be part of the TRC program associated with this workgroup, so that comp time is processed correctly.

If the Default from the Workgroup field on the TL Installation Options page is selected, any **Compensatory Time Off Plan** entered here will be associated to all time reporters as of the date they are associated with the workgroup. If the default from the Workgroup field on the TL Installation Options page is not selected, any entry in this field is not considered for batch or online comp time validation.

If you change the compensatory time-off plan on your workgroup, and the Default from Workgroup field on the TL Installation Options page is selected, the Referential Integrity process will trigger Time Administration to reprocess any Comp Time from the point of the effective date of the plan change. Time Reporters' Comp Time balances may change as a result. In addition, the Comp Plan Enrollment page will be updated automatically with the plan change for the time reporters in this workgroup.

For more information about compensatory time off plans, see PeopleSoft 8 Time and Labor, "Setting Up Your Basic Tables".

Setting Your Rounding Options

There are two types of rounding in PeopleSoft Time and Labor—pre-rules rounding and post-rules rounding:

Pre-rules Rounding

Pre-rules rounding applies only to punch time data. It does not apply to elapsed time.

If you want to apply pre-rules rounding, select **Round Punches Before Rules**. If you select this option, the system rounds all reported punches before applying rules to the time in Time Administration.

Note. Even though you have selected **Round Punches Before Rules**, rules that require actual punch times continue to evaluate time as it was originally reported. For example, rules that track attendance (late punches, for instance) continue to evaluate the originally reported time. In addition, you can create custom rules that evaluate time as it was originally reported, as the original time remains available for use in rules even when **Round Punches Before Rules** is selected.

For more information about how pre-rules rounding is applied during the batch process, see PeopleSoft 8 Time and Labor, “Understanding Batch Processing in Time Administration”.

Post-rules Rounding

Post-rules rounding can be applied to punch time as well as elapsed time. Post-rules rounding is applied after rules have been processed, but before time is transferred to Payable Time.

To enable post-rules rounding, select **Round Duration After Rules** and then choose one of the following rounding options:

Segment Rounding: Select this option if you want the system to round each segment of reported time and then sum all like segments before transferring the data to Payable Time.

Note. For punch time reporters, a segment is the duration between one punch and the next punch. For elapsed time reporters, a segment is one entry of time for a specific day. For example, if a time reporter reports 4 hours of REG and 4 hours of OT on one day, each entry of 4 hours would be considered a “segment.” Two segments are considered “alike” if all the information in reported time (and all relevant fields in the TL_RPTD_ELPTIME or PCHTIME tables) except TL_QUANTITY is the same.

Day Rounding: Select this option if you want the system to sum all like segments that belong to a single *day* and then apply rounding rules.

Note. For punch time reporters, a segment is the duration between one punch and the next punch. For elapsed time reporters, a segment is one entry of time for a specific day. For example, if a time reporter reports 4 hours of REG and 4 hours of OT on one day, each entry of 4 hours would be considered a “segment.” Two segments are considered “alike” if all the information in reported time (and all relevant fields in the TL_RPTD_ELPTIME or PCHTIME tables) except TL_QUANTITY is the same.

For more information about how post-rules rounding is applied during the batch process, see PeopleSoft 8 Time and Labor, “Understanding Batch Processing in Time Administration”.

After you have selected a rounding option, you need to define your option by specifying a **Rounding Interval** and a **Rounding Marker**.

Rounding Interval (min)

A rounding interval represents the number of minutes comprising a segment of an hour. For example, if you select **15** (minutes) in the **Rounding Interval** field, the following 4 intervals will be created for each hour:

Interval 1: x:00 to x:15

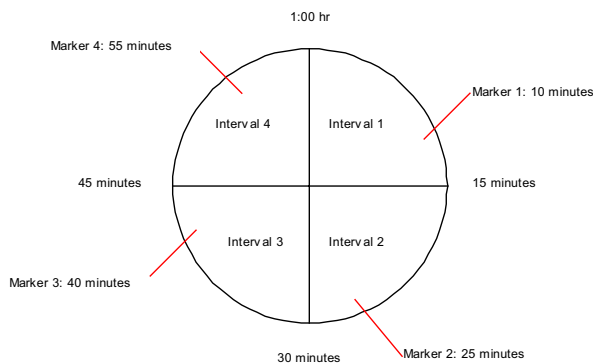
Interval 2: x:15 to x:30

Interval 3: x:30 to x:45

Interval 4: x:45 to x:00

Rounding Marker (min)

Rounding markers work in conjunction with rounding intervals (defined above) to define rounding rules: the rounding marker is a point in time in relation to which the system rounds either up or down within an interval. So if we return to the preceding example of four 15 minute rounding intervals, and select a rounding marker of 10 minutes, both the intervals and markers can be represented as follows:



Intervals and markers

Notice that each interval contains a corresponding rounding marker. A rounding marker cannot exceed the number of minutes in an interval, and occurs as many minutes after the start of each interval as the value you enter in the **Rounding Marker** field. So, in this example, the rounding marker occurs 10 minutes into each interval.

Understanding How the System Uses Intervals and Markers

The way rounding intervals and rounding markers are used depends on whether you are using pre-rules rounding or post-rules rounding:

Pre-rules Rounding

If you are rounding punches (pre-rules rounding), the system uses the rounding interval together with the rounding marker to round each punch to the closest start or end point of the interval in which the punch was made. The system then calculates the difference between each in and out punch and sends the resulting duration to Time Administration for rules processing. If a punch is made prior to the rounding marker, the system rounds down to the beginning of the interval. If a punch falls either directly on or after the rounding marker, the system rounds up to the end of the interval. A rounding marker always defaults to the midpoint of a rounding interval; the rounding marker can be modified.

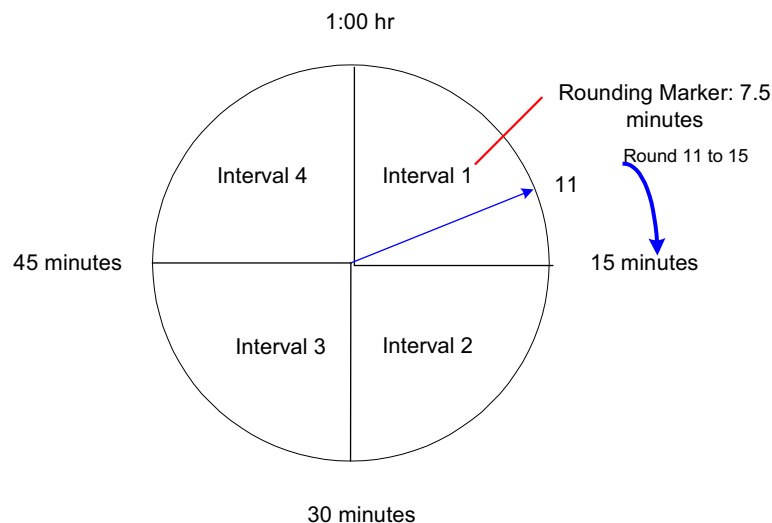
The following example of pre-rules rounding will help to clarify how the system applies a rounding rule. Let's assume that you have selected the following rounding options, and that the punch to be rounded occurs 11 minutes into the first rounding interval:

Rounding Option = Round Punches Before Rules

Rounding Interval = 15 Minutes

Rounding Marker = 7.5 Minutes

In this example, the system rounds the punch up to 15 minutes. This is because 11 minutes is greater than the rounding marker of 7.5 minutes.



Punch rounding

Post-rules Rounding

Post-rules rounding affects time for both punch reporters and elapsed time reporters. In the case of punch reporters, the system calculates the difference between individual consecutive punches

(for example, an IN and an OUT punch) to create a duration for each set of matched punches. These durations are then rounded, just as reported elapsed time would be for elapsed time reporters.

The post-rules rounding process first determines the interval (as defined previously) within which the duration falls and then rounds within that interval. If a duration falling within an interval is less than the rounding marker (for that interval), the system rounds down to the beginning of the interval. If the duration falling within the interval is equal to or greater than the rounding marker, the system rounds up to the end of the interval.

The following examples will help to clarify this process:

Example 1: Segment Rounding of Punch Time

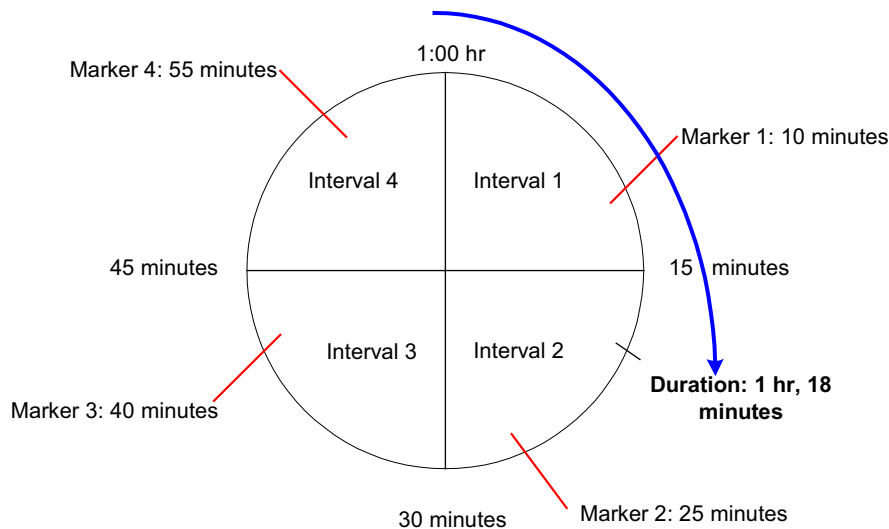
Let's assume that we have selected the following rounding options, that we are rounding punch time, and that the duration to be rounded is 1 hour, 18 minutes:

Round Duration After Rules = Segment

Rounding Interval = 15 Minutes

Rounding Marker = 10 Minutes

Because our **Rounding Interval** is **15** minutes and our **Rounding Marker** is **10** minutes, the system rounds 1 hour, 18 minutes to 1 hour, 15 minutes. This is illustrated in the following diagram:



Rounding a duration

In this example, the duration to be rounded (1 hour, 18 minutes) falls within Interval 2 (00:15 to 00:30). This means that the duration must be rounded up or down within that interval. Because 18 minutes is less than the **Rounding Marker** for Interval 2 (25 minutes), the duration is rounded down to 1 hour, 15 minutes.

Example 2: Segment Rounding of Elapsed Time

To illustrate how the rounding process works in the case of an elapsed time reporter, let's assume that we have selected the same rounding options used in the previous example, and that our time reporter is scheduled to work 8 hours on a given day, but positively reports 4.33 hours (4 hours and 20 minutes). In this case, the system would round the time to 4.25. This is because 4.33 hrs equals 4 hours and 20 minutes, and 20 minutes falls within Interval 2. The duration of 20 minutes is less than the Rounding Marker (25 minutes), so the duration is rounded down to 15 minutes, which is .25 hours. Therefore, the final time is 4.25.

Additional Examples

The following examples provide additional illustration of the post-rules rounding process, showing differences between the time data in Intermediate Payable Time and Payable Time:



For more information about Intermediate Payable Time and Payable Time, see Understanding Batch Processing in Time Administration.

Example 3: Segment Rounding (punch or elapsed time)

In segment rounding, the duration of each segment within a shift is rounded and then all like segments that have the same DUR (date under report) are summed. For example, let's assume that we have selected the following rounding options:

Round Duration After Rules = Segment
 Rounding Interval = 15 Minutes
 Rounding Marker = 7.5 Minutes

If we apply these rounding options to the following segments (durations) in Intermediate Payable Time, we end up with the following results after rounding:

Intermediate Payable Time

<i>Date</i>	<i>TRC</i>	<i>Original Hours</i>	<i>Task</i>	<i>Rounded Hours</i>	<i>Notes</i>
1/1/99	REG	4:06	TSK1	4:00	Each segment is rounded.
1/1/99	REG	4:08	TSK2	4:15	Each segment is rounded.

What follows are the results that the system will send to Payable Time:

Payable Time

<i>Date</i>	<i>TRC</i>	<i>Task</i>	<i>Rounded Hours</i>	<i>Notes</i>
1/1/99	REG	TSK1	4:00	This record is not added to the second one before going to Payable Time because it contains a different task

				(TSK1).
1/1/99	REG	TSK2	4:15	This record is not added to the first one because it contains a different task (TSK2).



In Payable Time, the hours for TSK2 would actually appear as 4.25, because 4 hours and 15 minutes is 4.25 hours. We have left the time as 4:15 for easier comparison to the Intermediate Payable Time rows.

Example 4: Day Rounding (punch or elapsed)

In day rounding, all the durations of like segments with the same DUR (date under report) are added together. These segments are then rounded before being moved into Payable Time. For example, let's assume that we have selected the following rounding options:

Round Duration After Rules = Day

Rounding Interval = 15 Minutes

Rounding Marker = 7.5 Minutes

If we apply these rounding options to the following segments (durations) in Intermediate Payable Time, we end up the following results after rounding:

Intermediate Payable Time

Date	TRC	Original Hours	Task	Rounded Hours	Notes
1/1/99	REG	2:15	TSK1	N/A	The two rows are combined before rounding.
1/1/99	REG	2:08	TSK1	N/A	Before rounding, there is a total of REG 4:23.

What follows are the results that the system will send to Payable Time:

Payable Time

Date	TRC	Task	Rounded Hours	Notes
1/1/99	REG	TSK1	4:30	Like reported time records are combined before rounding

As you can see, the total time for the day before rounding is 4 hours, 23 minutes. Because the rounding interval is 15 minutes and the rounding marker is 7.5 minutes, the system will round to

4 hours, 30 minutes. This is because 23 minutes falls within the second 15 minute interval (00:15 to 00:30) and 23 is greater than the midpoint of the interval (7.5 minutes).



In Payable Time, the hours would actually appear as 4.5, because 4 hours and 30 minutes is 4.5 hours. We have left the time as 4:30 for easier comparison to the Intermediate Payable Time rows.



If you change your rounding options, the rounding interval, or rounding marker, the Referential Integrity process will trigger Time Administration to reprocess any affected payable time from the effective-dated change forward. Affected instances of time need to be rerun through TA in order to recreate correct durations for payable time for the correct dates under report.

Specifying Day Breaker Options

In PeopleSoft Time and Labor we refer to the point where one day crosses over to the next as the “day breaker.” Although the day breaker is usually midnight—the moment when one calendar day becomes the next—you can set the day breaker to a different time to create virtual days that more closely mirror actual shifts worked by your time reporters. The system will then use the day breaker to determine the exact date under report (DUR) of each punch or collection of punches that comprise the shift. Depending on the **Day Breaker Options** and **Day Breaker Range** you select on the Workgroup panel, you can:

- Assign all the time in a shift to a date based on when the first punch was logged.
- Assign the time to a date based on when the last punch was logged.
- Assign the time based on when the majority of the time in a shift was worked.
- Split the time between different dates on either side of the day breaker.

In this section we’ll describe how to use the **Day Breaker** in combination with the **Day Breaker Options** and **Day Breaker Range** to control the DUR (date under report) assigned to reported time.

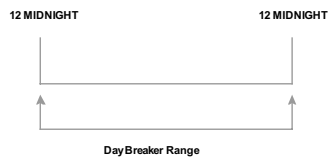


Although the normal day breaker is midnight, the best day breaker time of day for your company depends on your company’s work hours. We recommend you choose a time when there are no shifts or time reporters scheduled to work so that you won’t have to split time on either side of the day breaker. For example, if your company has two shifts, a morning and an evening shift with hours from 08:00-17:00 and 18:00-02:00 consecutively, you may want to choose 04:00 as your day breaker.

Understanding Day Breaker Options

Before you set your **Day Breaker Options**, you need to understand the relationship between the **Day Breaker** and the **Day Breaker Range**:

First, it is important to understand that each punch in a shift is associated with a virtual 24-hour time reporting period called the **Day Breaker Range**. This period begins with (includes) the **Day Breaker** at the beginning of the period and ends with the following **Day Breaker** (it does not include the next day breaker). For example, if the day breaker is 12 midnight, the virtual day breaker range is from 12 AM one day to 11:59 PM of the next day. The following is an illustration of a day breaker range:



Day breaker range



Note. The day breaker range may or may not be equivalent to an actual calendar day. You can make the range coincide with a calendar day, but you do not need to do so.

As illustrated in the diagram, the day breaker range establishes a 24-hour period (a “virtual day”) for reporting time. For any punch (or collection of punches) within this range, you can move the date under report in two directions: towards the **Range Start Day** or towards the **Range End Day**:

Range Start Day

Select this option if you want to assign punches within a day breaker range to the calendar (or “actual”) day intersected by the start of the range.

Range End Day

Select this option if you want to assign punches within a day breaker range to the calendar (or “actual”) day intersected by the end of the range.

The “start” and “end” day work together with the following **Day Breaker Options** to define the actual date under report (DUR):

Begin Time of Shift

Select this option if you want the system to assign all the punches in a shift to the day breaker range in which the shift began.

End Time of Shift

Select this option if you want the system to assign all the punches in a shift to the day breaker range in which the shift ended.

<i>Majority of Shift</i>	Select this option if you want the system to assign all the punches in a shift to the day breaker range in which the majority of the shift was worked.
<i>Split by Day Breaker</i>	Select this option if you want the system to split the shift between two-day breaker ranges on either side of the day breaker itself.

Here's how you'll use the **Day Breaker** in combination with the **Day Breaker Options** and the **Day Breaker Range** to define the date under report (DUR):

To Define the DUR:

1. Select a Day Breaker

The day breaker defines the “virtual” days (or day breaker ranges) to which you will assign punches in Step 2 (below).

2. Select a Day Breaker Option

To assign punches to one of the “ranges” you defined in Step 1, you must specify a **Day Breaker Option**. Depending on your selection, you can assign all the punches in a shift to the range in which:

- The first punch was logged (***Begin Time of Shift***)
- The last punch was logged (***End Time of Shift***)
- The majority of the time in a shift was worked (***Majority of Shift***)
- Or split the time between ranges on either side of the day breaker (***Split by Day Breaker***)

3. Move the DUR for Punches Assigned to a Range Backwards or Forward

Within a **Day Breaker Range** (as previously noted), you can shift the date under report for any punch to the calendar day intersected by the start of the range (by selecting ***Range Start Day***), or to the calendar day intersected by the end of the range (by selecting ***Range End Day***). Consider the following example:

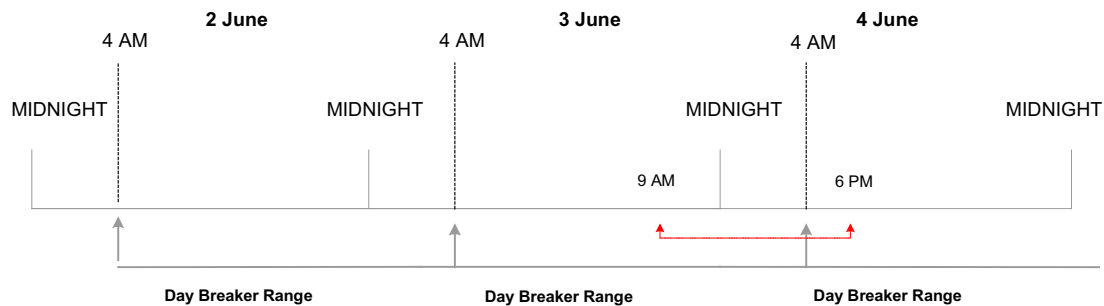
Example: Shifting the DUR to the End of the Day Breaker Range

In this example let's assume the following:

- We've set the day breaker to 4:00 AM.
- We've chosen to assign all the punches in a shift to the day breaker range on which the first punch was logged (our **Day Breaker Option** is ***Begin Time of Shift***).
- Our Day Breaker Range is ***Range End Day***.
- Our shift begins at 9:00 AM on 3 June and ends at 6:00 AM on 4 June. The shift therefore

crosses the day breaker.

This scenario can be represented as follows:



Establishing a DUR

In this example we've chosen ***Begin Time of Shift*** as our **Day Breaker Option**. Because the first punch occurs at 9 AM on 3 June, the system includes the entire shift within the day breaker range in which the first punch falls—the range that begins at 4:00 AM June 3 and ends at 3:59 AM on June 4. However, the system will set the DUR for the shift as a whole to 4 June. The reason for this is that the **Day Breaker Range** is **Range End Day**, and the day (the actual calendar day) intersected by end of the range is 4 June.



If we had set the **Day Breaker Range** to **Range Start Day** in this example, the DUR would be 3 June, because the start of the range falls on the 3rd of June.

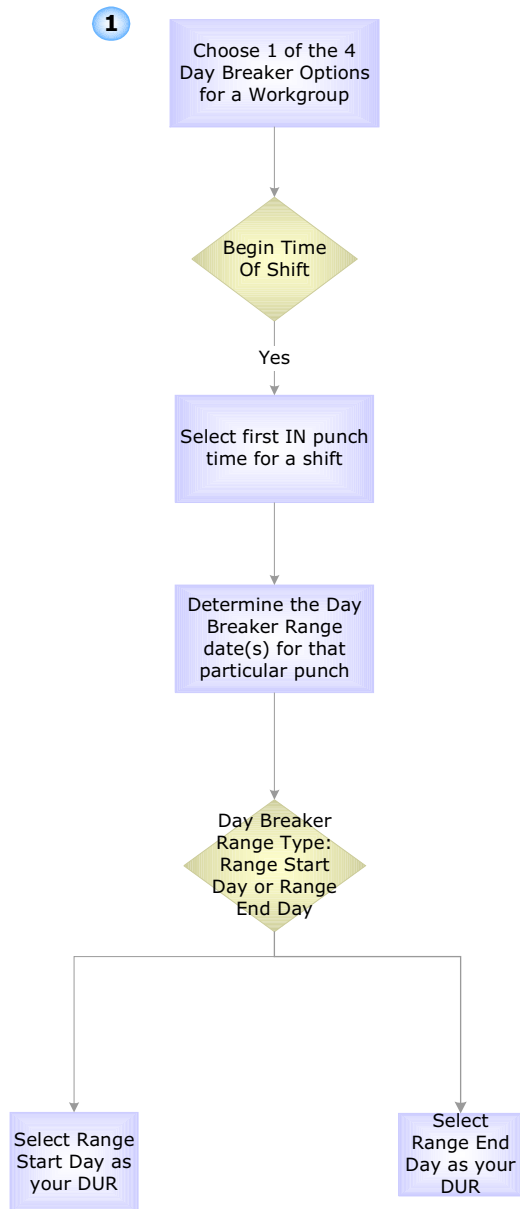


If you change your day breaker or day breaker options, the Referential Integrity process will trigger Time Administration to reprocess any affected payable time from the effective dated change forward. Affected instances of time must be rerun through Time Administration to recreate payable time.

Day Breaker Option Process Flows

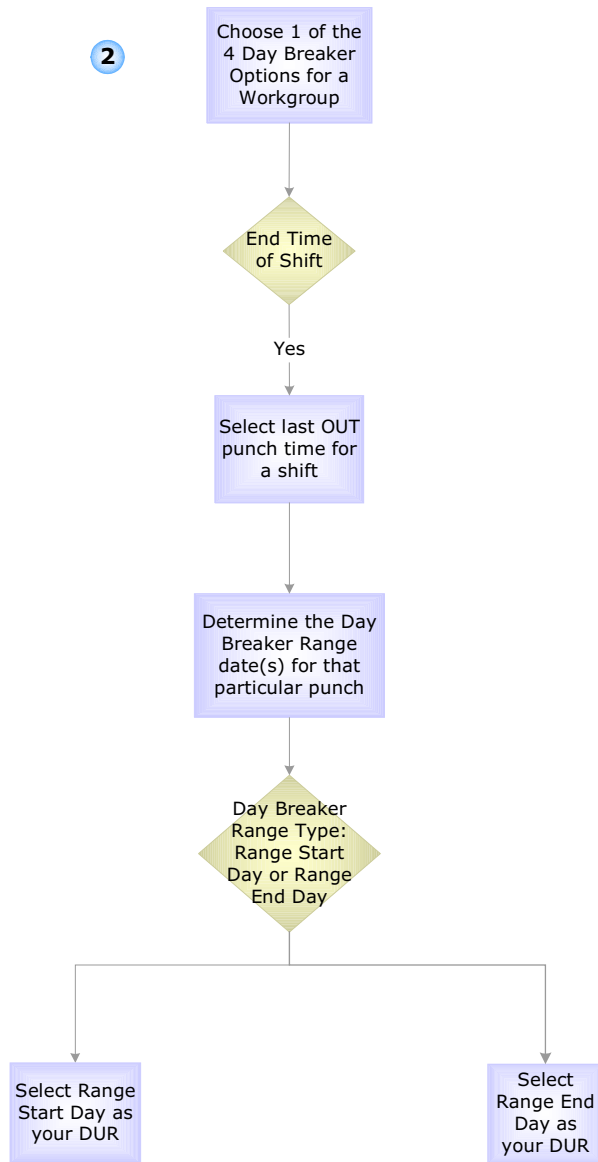
The following diagrams illustrate the process flow for each **Day Breaker Option**. These diagrams will assist you in determining what the outcome for the date under report (DUR) would be based on what you select as your **Day Breaker Options** and **Day Breaker Range**.

Process Flow 1 (Begin Time of Shift)



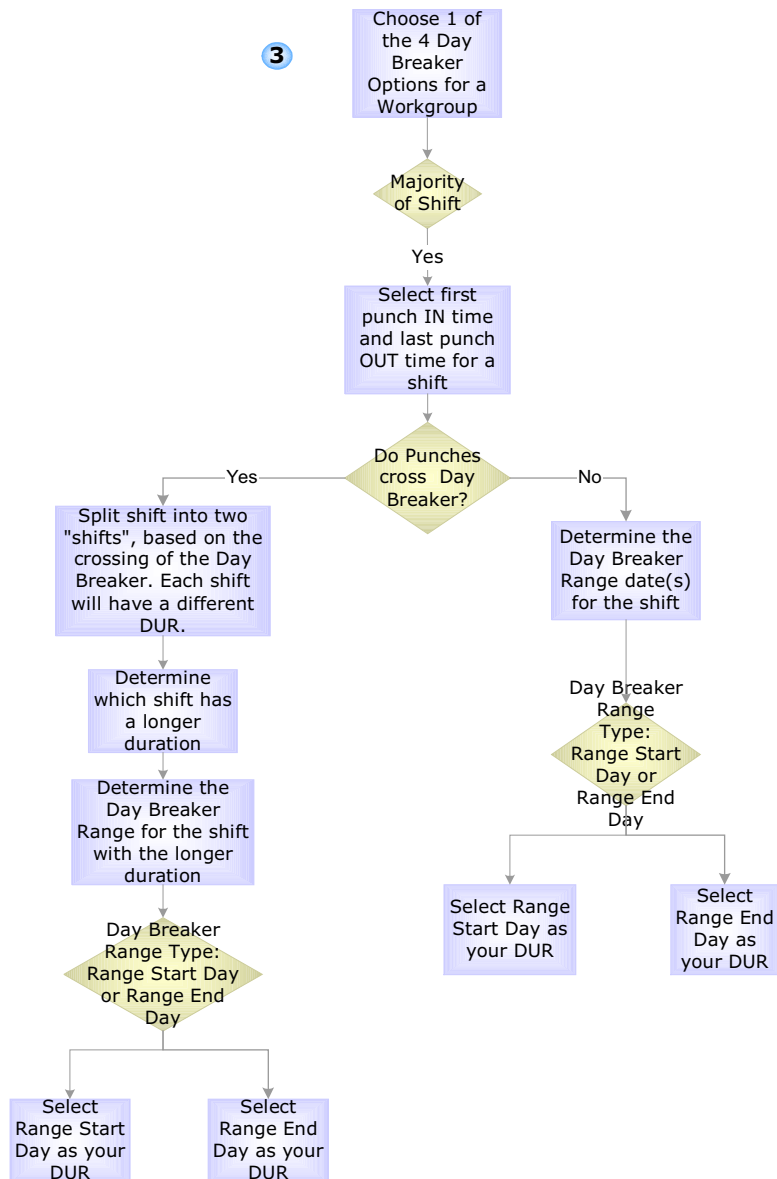
Begin time of shift

Process Flow 2 (End Time of Shift)



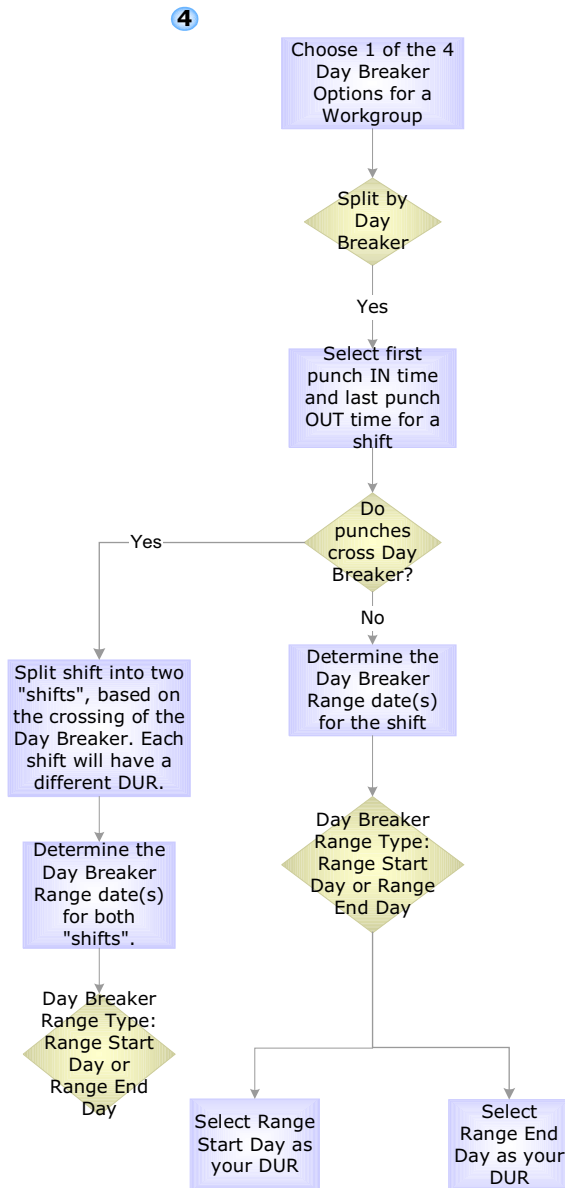
End time of shift

Process Flow 3 (Majority of Shift)



Majority of shift

Process Flow 4 (Split by Day Breaker)



Split by day breaker

Day Breaker Examples

This section contains examples illustrating the effect on the DUR (date under report) of the different **Day Breaker** and **Day Breaker Range** options:

Example 1

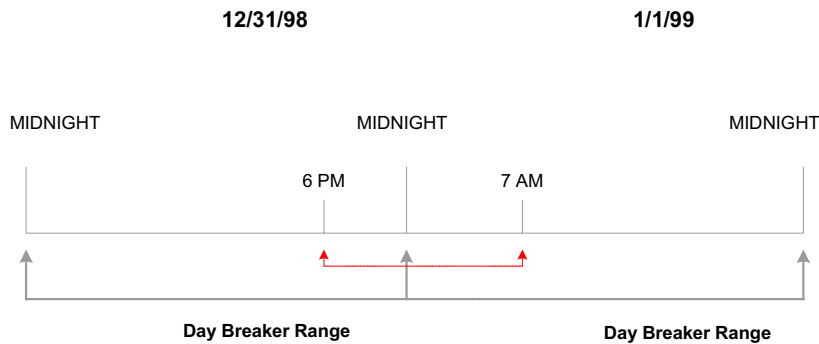
In this example, the punch time reported crosses the day breaker time of day. The day breaker time of day is set to 12 midnight.

The time reporter enters the following punches:

Punch IN 18:00 31 December 1998

Punch OUT 07:00 1 January 1999

Using the data above, the diagram shows the dates and day breaker ranges:



The chart below illustrates the results of selecting different daybreaker ranges and options.

Day Breaker Option	Day Breaker Range	Resulting DUR
Begin Time of Shift	Range Start of Day	31 December 1998
End Time of Shift	Range Start of Day	1 January 1999
Majority of Shift	Range Start of Day	1 January 1999
Split by Daybreaker	Range Start of Day	6 hours fall on 31 December 1998 and 7 hours fall on 1 January 1999
Begin Time of Shift	Range End of Day	1 January 1999
End Time of Shift	Range End of Day	2 January 1999
Majority of Shift	Range End of Day	2 January 1999
Split by Day breaker	Range End of Day	6 hours fall on 1 January 1999 and 7 hours fall on 2 January 1999

Example 2

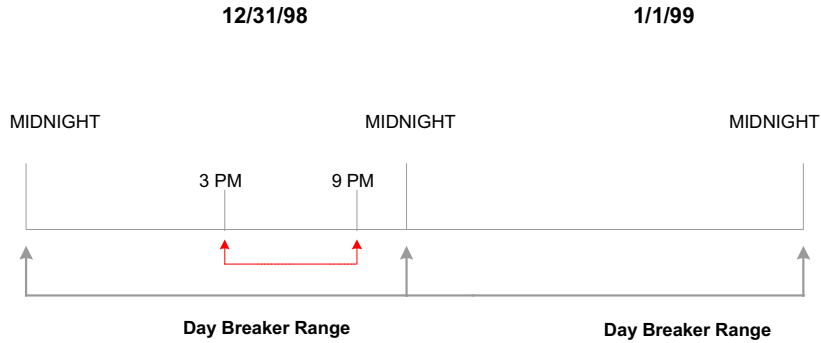
In this example, the time reported does not cross the day breaker time. The day breaker time is set to midnight.

The time reporter enters the following punches:

Punch IN 13:00 31 December 1998

Punch OUT 21:00 31 December 1998

The following diagram shows the dates and day breaker ranges, based on the data above:



The chart below shows the results of selecting different daybreaker ranges and options.

Day Breaker Option	Day Breaker Range	Result
Begin Time of Shift	Range Start of Day	31 December 1998
End Time of Shift	Range Start of Day	31 December 1998
Majority of Shift	Range Start of Day	31 December 1998
Split by Daybreaker	Range Start of Day	31 December 1998
Begin Time of Shift	Range End of Day	1 January 1999
End Time of Shift	Range End of Day	1 January 1999
Majority of Shift	Range End of Day	1 January 1999
Split by Daybreaker	Range End of Day	1 January 1999

Example 3

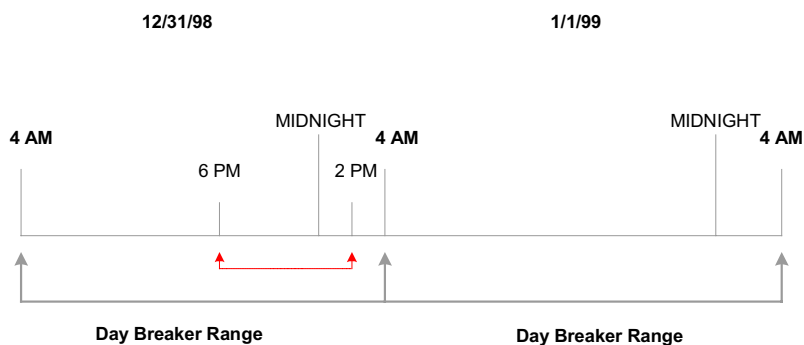
In this example, the time reporter does not cross the day breaker. The day breaker is set to 04:00.

The time reporter enters the following punches:

Punch IN 18:00 31 December 1998

Punch OUT 02:00 1 January 1999

The following diagram shows the dates and day breaker ranges, based on the data above:



The chart below shows the results of selecting different daybreaker ranges and options.

Day Breaker Option	Day Breaker Range	Result
Begin Time of Shift	Range Start of Day	31 December 1998
End Time of Shift	Range Start of Day	31 December 1998
Majority of Shift	Range Start of Day	31 December 1998
Split by Daybreaker	Range Start of Day	31 December 1998
Begin Time of Shift	Range End of Day	1 January 1999
End Time of Shift	Range End of Day	1 January 1999
Majority of Shift	Range End of Day	1 January 1999
Split by Daybreaker	Range End of Day	1 January 1999

Example 4

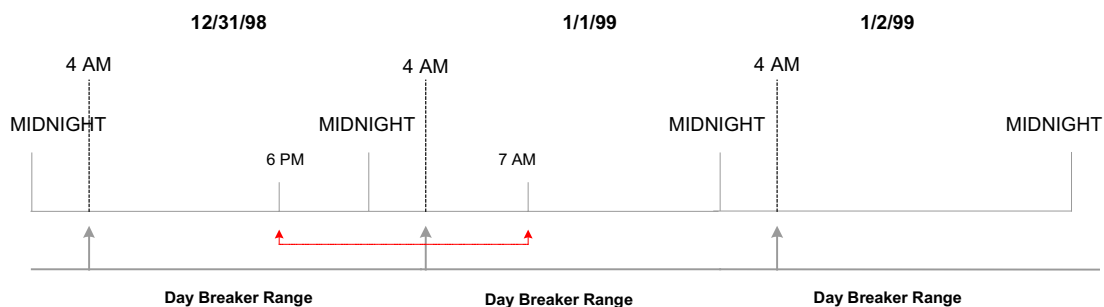
In this example, reported time crosses the day breaker. The day breaker is set to 4 AM.

The time reporter enters the following punches:

Punch IN 18:00 31 December 1998

Punch OUT 07:00 1 January 1999

The diagram below shows the dates and day breaker ranges based on the data above.



The chart below shows the results of selecting different daybreaker ranges and options.

Day Breaker Option	Day Breaker Range	Result
Begin Time of Shift	Range Start of Day	31 December 1998
End Time of Shift	Range Start of Day	1 January 1999
Majority of Shift	Range Start of Day	31 December 1998
Split by Daybreaker	Range Start of Day	10 hours fall on 31 December 1998 and 3 hours fall on 1 January 1999
Begin Time of Shift	Range End of Day	1 January 1999
End Time of Shift	Range End of Day	2 January 1999

Majority of Shift	Range End of Day	1 January 1999
Split by Daybreaker	Range End of Day	10 hours fall on 1 January 1999 and 3 hours fall on 2 January 1999

Understanding Workgroup Transfers



Important! This section assumes that you have a thorough understanding of how Time Administration defines the period of interest for rules processing. If you are not familiar with the concept of the “period of interest,” you should review the chapter on Batch Processing in Time Administration before reading the following section.

Workgroup transfers (in both current and prior periods) can affect how rules are applied and consequently the data that Time Administration sends to Payable Time. This section describes the effect of workgroup transfers on the period of interest calculation in Time Administration as well as on rules processing.

Transferring in the Current Period

If an employee transfers from one Workgroup to another in the current period, Time Administration processes the employee in two separate batches—one for each workgroup. When Time Administration creates the rule map for each batch, it adjusts the start and end dates of the period of interest to reflect the effective date of the transfer according to the following rule: *If the effective date of the new workgroup is greater than the initial period of interest begin date, the start date for the batch associated with the new workgroup will be set equal to the new workgroup effective date.*

This is illustrated in the following example:

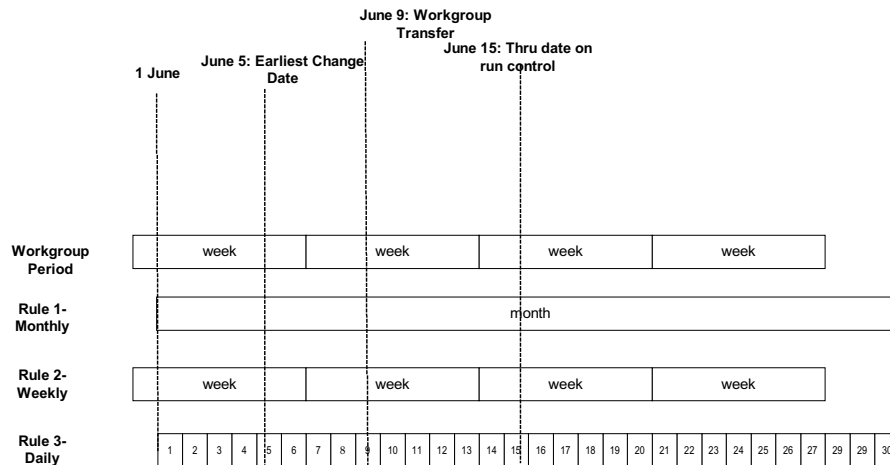
Example 1.

In this example let's assume the following:

- A time reporter changes workgroups on 9 June—in the middle of the current workgroup period (5 to 11 June).
- The Time Period ID associated with each workgroup is weekly (the week begins on Monday and ends on Sunday).
- Each workgroup has a rule program containing 3 rules with the same rule periods (a weekly rule, a monthly rule, and a daily rule). However, the rules are different for each workgroup.



Remember: To determine the initial period of interest, Time Administration uses the Time Period ID on each time reporter's workgroup to determine the start date and the end date of the period intersected by the earliest change date. Any time reporter whose Earliest Change Date is less than or equal to the through date on the run control panel will be picked up when you run time administration—as long as his or her effective dates fall within the workgroup period, or their Max (maximum) TL_EMPL_DATA.EFFDT <= to the earliest change date. In addition, their TL_TR_STATUS.TA_STATUS must equal 'Y.'



In this example Time Administration sets the end date of the period of interest associated with the old workgroup to 8 June (the last day the employee is part of the old workgroup), and the start date of the period of interest associated with the new workgroup to 9 June. The rules associated with the old workgroup are used to process all dates before and including 8 June—going back to the final period of interest start date. The rules associated with the new workgroup are used to process all dates from 9 June to the final period of interest end date. However, because the transfer occurs in mid-week, the weekly and monthly rules (for both workgroups) will not have access to data for their entire rule periods and may be applied incorrectly. (Any rule crossing the transfer date could be applied incorrectly). For this reason, we recommend that you change workgroups at the beginning of a period whenever possible. If you absolutely must change workgroups mid-period, you will have to override rules processing and manually enter the hours to be paid during the transfer period as follows:

To report time for the transfer period:

1. Enter the time manually through the time reporting pages

Enter time manually for the transfer period exactly as the **time reporter** should be paid (including overtime hours). This time will go directly to Payable Time (see step 2).

2. Enter dates for the transfer period on the Override Rules page

To tell Time Administration to accept time exactly as you enter it (untouched by rules), you must enter the dates for the transfer period on the Override Rules for Time Reporters page. Time Administration will extract records from TL_IPT1 into a working table--

TL_TA_RUL_OVR--before applying rules to the data stored on TL_IPT1. Time Administration will apply rules to all records stored on TL_IPT1 and update Payable Time as usual. But, as a final step, it uses data stored in the TL_TA_RUL_OVR table (preserved, untouched by rules) to replace records found on the TL_PAYABLE_TIME table.



Note. Time Administration will not change hours entered as rule overrides. Rule overrides go directly to Payable Time.



For more information about rules overrides, see Managing Time. For more information about entering time manually, see Reporting Time.



The same logic that governs workgroup transfers governs changes to Rule Program effective dates as well as TL_EMPL_DATA effective dates—effective dates associated with employee hires, inactivation, or job transfers. So, for example, if the rule program associated with a workgroup change in mid-period, the start and end dates of the period of interest must be adjusted. Similarly, because a time reporter could have more than one row in TL_EMPL_DATA with different effective dates, multiple rows per time reporter can be pushed into the batch creation process. In this case, start dates and end dates must be adjusted for such things as the TL_EMPL_DATA.EFFDT falling within the period of interest. For example, if the EFFDT of a time reporter is greater than the START_DT of the period of interest, the START_DT will be set equal to the EFFDT.

Retroactive Transfers

Retroactive Workgroup transfers can also prevent rules from being applied correctly—for the same reason that transfers in the current period affect rules processing. Thus, in the previous example, if we assume that the transfer occurs during a period that has already been processed, the weekly and monthly rules may again be applied incorrectly. As in the previous example, we recommend that you change workgroups at the beginning of a period whenever possible. If you absolutely must change workgroups mid-period, you will have to manually enter the hours to be paid during the transfer period as rule overrides.



In the case of retroactive transfers there is an additional factor to consider: the period you are reprocessing with new rules has already been processed, which means that offsets to the original data will be created, new data will be generated, and both the new and old results will be passed to Payable Time.



For more information about rules overrides, see Managing Time. And For more information about entering time manually, see Reporting Time.

Understanding Changes to a Rule Program

There may be times when you need to change the rules in the rule program associated with a workgroup. These rule changes could occur during the current processing period as well as retroactively. For example, you might need to go back in time to apply new rules to previously reported time. The time data as originally reported isn't different, but the way the data needs to be processed has changed. For this reason it is important to understand some of the implications of changing the rules in a rule program.

Understanding the Consequences of Rule Changes

The same logic that governs mid-period workgroup transfers applies to mid-period changes to rule program effective dates. For example, if the rule program changes in mid-period, the start and end dates of the period of interest must be adjusted and rules could be applied incorrectly. For this reason, we recommend that you set rule program changes to occur at the beginning of a period whenever possible. If you absolutely must change your rule program in mid-period, you will have to override rules processing and manually enter the hours to be paid during the transfer period. Because the effect of mid-period changes to workgroup data is discussed in the section Understanding Workgroup Transfers, you should review the material in that section prior to modifying your rules. There are, however, some additional precautions you should observe when changing rules:

- You should never make changes directly to rules themselves. This could result in incorrect results if you need to reprocess prior period time using the rule definitions that were valid in the prior periods. Also, rules are part of rule programs, which are used by workgroups, and reference TRC programs. So if you change a rule this change will have multiple impacts throughout the system.
- Instead of modifying rules, you should do the following:
 - Create a new rule: modify the existing rule and save it as a new rule with a new rule ID, or create a new rule from scratch.
 - Insert a new effective-dated row in the Rule Program.
 - Remove the old rule from the new effective dated rule program and insert the new rule.
 - If the effective date of the change is set to a prior period, data for prior periods will be reprocessed.



You cannot reprocess dates for a time reporter in a workgroup prior to the effective date of the workgroup itself. In other words, if the workgroup effective date is 1/1/2000 you cannot reprocess dates prior to 1/1/2000. Similarly, you can not reprocess dates for a time reporter in a workgroup prior to the date that the time reporter was enrolled in the workgroup.

CHAPTER 4

Establishing Time Reporting Codes

Time Reporting Codes (TRCs) represent the level at which an organization actually needs to track employee time to support all of its administrative and compensation needs. For example, for payroll processing you establish an Earnings Code for Regular time (REG) and for time reporting you establish TRCs for *all* versions of regular time, such as tardy-paid, meeting-nonproductive, sick-paid, and so on.

We define a TRC as an element of compensation or a bucket of several elements in which the system collects labor data, hours, amounts, or units worked.

There may be times when you will need to use more than one payroll system; with PeopleSoft Time and Labor, you can establish earnings code attributes so that any payroll system can be synchronized with Time and Labor's TRCs. Also, you can copy the attributes from North American Payroll earnings codes for ease of integration.

You assign TRCs to TRC Programs, which are ultimately assigned to workgroups. Multiple workgroups can share these TRC Programs. We also provide the ability to clone a TRC Program, which makes implementing the system easier.

Time Reporting Codes and Referential Integrity

When you make a change to one area of the application, Referential Integrity makes sure the changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or employee related data that could invalidate related objects or values in the system.

The following tables describe Referential Integrity actions when certain changes, inactivations, or deletions are made during TRC processing.



For more information about the Referential Integrity feature within PeopleSoft Time and Labor see Understanding Referential Integrity in this PeopleBook.

Prevention of Inactivation or Deletion of Effective-Dated Rows

The following table lists the pages and conditions when the system will not allow the inactivation or deletion of effective-dated rows.

Page	Condition
TRC	You cannot inactivate a TRC that is associated with a TRC program.
	You cannot delete an effective-dated row if it invalidates the association with a TRC program.
	You cannot inactivate a TRC if it is associated to a Compensatory Time Off Plan.
	You cannot delete an effective-dated row if it invalidates the association with a Compensatory Time Off Plan.
TRC Program	You cannot inactivate a TRC program if it is associated to a Workgroup.
	You cannot delete an effective-dated row if it invalidates the association to a Workgroup.
	You cannot inactivate a TRC program if it is associated to a Time Collection Device.
	You cannot delete an effective-dated row if it invalidates the association to a Time Collection Device.

Execute Edit Error Checking

You cannot change the minimum effective date on a page to be less than the minimum effective date of a field that acts as a prompt on this page.

Page	Prompts on Page
TRC	Unit of Measure
	NA Earnings Code
	GP Take Code
	GP Earns Code
TRC Program	TRC

Nested Effective Dates

You cannot change the effective date of the prompt table to be greater than the effective date of the target table.

Prompt Table	Target Table
TRC	TRC Program

Prompt Table	Target Table
	Compensatory Time Off Plan
TRC Program	Workgroup
	TCD Setup



For more information about how the system reacts on nested effective-dated tables, see Understanding Nested Effective-Dated Tables in this PeopleBook.

Interfacing to PS Projects

We provide a Unit of Measure (UOM) page for clients who do *not* interface with PeopleSoft Projects. You can establish your own UOMs for use when establishing your TRC attributes.

If you interface with PeopleSoft Projects, you establish your Unit of Measure values directly in your PeopleSoft Projects application, in your Financials database. The system displays the values from PeopleSoft Projects on the Unit of Measure page in PeopleSoft Time and Labor.

The system determines how to display the fields on this page based on the TL Installation page, **Interface with PS/Projects** check box. If it is selected, the fields are unavailable for entry. If **Interface with PS/Projects** is cleared, the fields on the page are available for entry.



For more information about the TL Installation page, see Establishing TL Installation Options in this PeopleBook.

Understanding Mapping TRCs to Earnings Codes

You must explicitly map each TRC to a payroll Earnings Code. However, a TRC does not have to be mapped to an Earnings Code if you intend to use the TRC to collect labor information for reporting use or analysis by financial systems. When a TRC is not mapped, the system does not send the information to payroll for payment.

PeopleSoft Time and Labor enables you to keep track of reporting information at the TRC level—information that's not required for payment of time. For example, PeopleSoft Time and Labor can keep track of actual or compensation hours but will not send that information to payroll, unless you actually need to display the time on the employee's pay advice statement. In this way, your payroll system is protected from reporting detail that could potentially inhibit optimal processing performance.

Synchronizing TRCs With NA Earnings Codes

We enable you to synchronize your TRCs to North American Payroll Earnings Codes using the Map to NA Earnings Code feature. For other pay systems, you will have to manually enter your Earnings Code in the Mapping to Earnings Code section of the TRC Setup page.

When you choose the **Map To NA Earnings Code** feature, and click on the **Sync** button, all of the effective-dated rows of that earnings code are carried over to the TRC Definition. There is no difference in effective dated rows on TRC and the NA Earnings Code. In this way, PeopleSoft Time and Labor can choose the right row when calculating estimated gross and not be out of synchronize with the NA Earnings code. The field values that are carried over from the NA Earnings Code to the TRC are as follows:

- Effective Date
- Multiplication Factor
- Rate Adjustment Factor
- Flat Amount
- Unit/Override Rate
- Description
- Short Description
- Add to Gross Flag



When creating a new TRC, the current system date will default as the effective date. This effective dated row will remain after synchronizing with a NA Earnings Code. This row will inherit the attributes of the maximum effective-dated row on the NA Earnings Code, that is less than the effective date on the TRC.

The **Flat Amount** on the Earnings Code populates the **Flat Amount** element on the TRC. The Unit/Override Rate on the Earnings Code populates the **Rate** element on the TRC. The **Add to Gross** value from the NA Earnings Code initially populates the **Distribute Costs** Flag on the TRC, although you can change the value.

The following table describes how the system handles fields based on your synchronize to NA Earnings Codes choices.

Action	What the System Does
When your TRC is <i>not</i> synchronized to a NA Earnings Code	The Flat Amount and Rate fields are hidden because they are only used when you map to a NA Earnings Code.
When your TRC is synchronized to a Units Earnings Code	The Flat Amount element is hidden and defaults to Selected.

Action	What the System Does
	The Rate field is displayed with the value from the NA Earnings Code
	The Rate Overridable field is hidden and defaults to <i>Not Selected</i> .
When your TRC is synchronized to a Flat Amount NA Earnings Code	The system displays the Flat Amount value from the NA Earnings Code.
	The Per Instance Overridable field is hidden and defaults to <i>Not Selected</i> .
	The Rate and Overridable fields are hidden and default to <i>Selected</i> .
When you unsynchronize a TRC from a Flat Amount or Unit Override/Rate NA Earnings Code	The Rate Overridable and Per Instance Overridable fields are hidden and defaults to <i>Selected</i> .
If a reported rate is different from the Rate on the TRC, and the TRC is synchronized to a NA Earnings Code	We have a PeopleSoft delivered rule that you can include in your Rule Program that will change the reported Rate to the TRC rate in Payable Time. The rule is TL_UPDOVRRT.
If a reported QTY and Currency Code do not match the Flat Amount and Currency Code on the TRC	We have a PeopleSoft delivered rule that you can include in your Rule Program in which the reported QTY and Currency Code are changed to the QTY and Currency Code for the TRC in Payable Time. The rule is TL_UPDQTY.
If an Override Rate is reported in PeopleSoft Time and Labor and one already exists on the Earnings Code definition	The rate on the Earnings Code definition takes precedence.
If there is an Amount Value in the Quantity field in Time and Labor, and the NA Earnings Code has a Flat Amount value defined	The Flat Amount on the Earnings Code takes precedence.



Knowing the fields that take precedence described in the table above is important when setting up your TRCs and Earnings Codes in order to ensure that payment occurs the way you want.

Affect on Deleting the Mapping to an Earnings Code

If you choose to delete a middle or maximum effective-dated row on a NA Earnings Code, which is mapped, to a TRC, we recommend that you unsynchronize the current mapping and then reselect the same NA Earnings Code and click on the **Sync** button again. The system will

automatically populate the mapping earnings code section of the page with the valid NA Earnings Code from the prior row.

If you delete the mapping to a NA Earnings Code for the minimum effective-dated row, we recommend that you manually map to another active NA Earnings Code.

Affect on Inactivating the Mapping to a Earnings Code

If you choose to inactivate the effective-dated row on an NA Earnings Code that is synchronized to a TRC, we recommend that you unsynchronize the current mapping and then reselect the same NA Earnings Code and click on the **Sync** button again. This way you can ensure that the common attributes are being copied down appropriately. In addition, we recommend that you check for inactive rows for the mappings and decide if you want to resynchronize to a different Earnings Code.

Unsynchronizing a TRC From an NA Earnings Code

If you no longer want to have your TRC synchronized to your NA Earnings Code:

- Blank out the Earnings Code on the Map to NA Earnings Code field and hit the Unsynchronize button:
- You will receive the following warning message: “Do you wish to unsync this TRC? If you click on **OK**, then any future changes to the North American Earnings Code will not be updated to the TRC Table.”
- Click **Ok**.
- You are then left with synchronized rows from the NA Earnings Code on the TRC in which the fields are no longer controlled by the NA Earnings Code and are ready for you to edit. The system maintains the mapping to the same NA Earnings Code as if you are manually mapped to that code. You can delete rows or change fields at this point. You are still mapped to the Earnings Code for payment of the time associated with this TRC.

Units of Measure Page

Usage	For clients who do not interface to PS Projects, use this Page to establish Unit of Measure values. For clients who interface to PS Projects, use this Page to view Unit of Measure values established in your PS/Projects application.
Object Name	TL_UNITS_TBL
Navigation	Go, Define Business Rules, Define Time and Labor, Setup 1, Units of Measure
Prerequisites	None
Access	Enter a Unit of Measure code

Requirements	

Units of Measure

Unit of Measure: BOX

Description:

Short Description:

Unit of Measure page

Unit of Measure

The system displays the **Unit of Measure** Code you entered to access this page.

Description

Enter a **Description** for the **Unit of Measure**. This field description is only valid if you chose **Units** as your **TRC Type**.

Short Description

Enter a **Short Description** for the **Unit of Measure**.

TRC 1 Page

Usage	Use the TRC 1 page to define Time Reporting Code attributes and map TRC's to Earnings Codes by entering the Pay System and corresponding Earnings Code.
Object Name	TL_TRC_SETUP
Navigation	Define Business Rules, Define Time and Labor, Setup 1, TRC, TRC 1
Prerequisites	None
Access Requirements	Enter a TRC name.

TRC 1 page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, and **Short Description**.



Before mapping a TRC to a Global Payroll Take Code or Earnings Code, you must have a User Rules Profile setup in the Global Payroll system in order to view these codes.

Time Reporting Code

This field displays the value that you entered to access this page.

GP Absence Flag (global payroll absence flag)

Select this check box if you want this TRC to be used in Global Payroll (GP) absence processing. When you tab out of the field, the system displays the fields that are appropriate for defining the GP TRC, your Global Payroll Take Code, and Earnings Code. This element will only be displayed when you have selected Global Payroll on the General Installation Options page.

Map To NA Earnings Code

Select the North American Earnings Code from which you want to map this TRC from the drop-down list. The system derives the valid values from the Earnings Code Table you set up in your North American Payroll system. It displays values that are active. This element will only be displayed when you have selected North American Payroll on the General Installation Options page.

You can choose *not* to use the **Map To NA Earnings Code** feature. You may want to do this if you need to calculate the TRC estimated gross differently than you would calculate the associated earnings for the North American Payroll.

Note. A TRC cannot be simultaneously used for both GP absence processing and NA payroll processing. You will have to setup two separate TRCs. You cannot select the GP Absence Flag and also map the TRC to an Earnings Code for NA Payroll. You can, however, map the TRC to NA Payroll and select GP as your pay system under Mapping to Earnings Codes along with an associated Earnings Code for this TRC. In this way, you can make use of one TRC for both pay systems. **Important!** You must select your TRC Type before you map and synchronize your TRC to your Earnings Code. The Mapping to NA Earnings Code feature will be enabled once you choose the TRC Type. This will assist you with the proper pairing of TRC Type to Earnings Code payment types from your Earnings Code.

Sync/Unsync Button
(synchronize and unsynchronize)

Click the **Sync** button if you want the system to carry over all of the effective dated rows of that Earnings Code to the TRC Definition from your NA Payroll system.

The system copies over the **Multiplication Factor** and **Rate Adjustment Factor** and they retain the same names on the TRC. The **Add to Gross Flag** on the NA Earnings Code initially defaults to the **Distribute Costs Flag** on the TRC, though you can edit this field after you synchronize. If there is a **Flat Amount** on the NA Earnings Code, it defaults to the **Flat Amount** field on the TRC. If there is a **Unit/Override Rate** on the NA Earnings Code, it defaults to the **Rate** field on the TRC.

You can choose to leave the **Description** and **Short Description** fields blank, the system will copy over these two field values from the NA Earnings Code.

If you inactivate the minimum effective-dated row of a NA Earnings Code that is synchronized to a TRC, you will receive the following warning message: Selected Earnings Code is Active with the following TRCs (RATE) (13500,169). Selected Earnings Code is Active with TRCs. Do you wish to inactivate Earnings Code now? Status of the Earnings code on the TRC will be set to Inactive. Do you wish to update the TRCs that are mapped to this Earnings Code now?

If you inactivate the maximum effective-dated row on the NA Earnings Code, you will receive the following warning message: Selected Earnings Code is in Synchronize with the following TRCs (%1). If you hit OK the TRCs shown will get Unsynchronized and you have to map those TRCs to some other Earnings Code. Do you wish to Unsynchronize these TRCs that are mapped to this Earnings Code now? (13500, 150).

If you delete a row on the NA Earnings Code which is synchronized to a TRC, you will receive the following warnings message: Selected Earnings Code is **Active** with the following TRCs (%1). Make sure that you re-synchronize the TRC to the Earnings Code in Time and Labor. (13500, 180).

Status

Select an **Active** or **Inactive** status for this TRC. The default is **Active**. A row that is synchronized with a NA Earnings Code always defaults to **Active** and is grayed out.

Type

Select a TRC **Type** from the drop-down list. Valid values are **Amount**, **Hours**, or **Units**. If you select a **Type** of **Amounts** you cannot enter a rate in the **Rate** field; also the **Rate Adjustment Factor** and **Multiplication Factor** will become unavailable for entry.

Only a TRC Type of **Hours** can be used for Labor Dilution.

The following Table provides the valid TRC Type combinations with Earnings Types, Comp Rate Code Types, and TL Quantities.

TRC Type	Earnings Payment Type	Comp Rate Code Type	TL Quantity
H – Hours	B – Both Hours and Amounts OK	Not Allowed	
	E – Either Hours or Amounts OK	HR – Hourly Rate	
		HF – Hourly + Flat Amount	
		PC – Percent	
	H – Hours Only	HR – Hourly Rate	
		HF – Hourly + Flat Amount	

TRC Type	Earnings Payment Type	Comp Rate Code Type	TL Quantity
		PC – Percent	
	U – Unit/Override Rate	Not Allowed	
A – Amounts	A – Amounts Only	FA – Flat Amount	Must be zero
	B – Both Hours and Amounts OK	FA – Flat Amount	Must be zero
	E – Either Hours or Amounts OK	FA – Flat Amount	Must be zero
		HF – Hourly + Flat Amount	
		HR – Hourly Rate	
		PC – Percent	
	F – Flat Amount	Not Allowed	
U – Units	B – Both Hours and Amounts OK	Not Allowed	
	E – Either Hours or Amounts OK	HF – Hourly + Flat Amount	Must be zero
		HR – Hourly Rate	
		PC – Percent	
	H – Hours Only	HF – Hourly + Flat Amount	
		HR – Hourly Rate	
		PC – Percent	
	U – Unit/Overridable Rate	Not Allowed	

Currency Code

Select the **Currency Code** for an **Amount** TRC Type. If you change the Currency Code for this TRC, all quantities in payable time from the time of the change associated with this TRC will reflect the new currency code. The Currency Code element only appears and is valid for **Amount** TRC Types.

Used in Labor Dilution

Select the **Used in Labor Dilution** check box if you want this TRC to be used during Labor Dilution. You must select a **TRC Type** of **Hours**; otherwise this check box is unavailable for entry. If you change this field to selected, all time associated with this TRC will be diluted as of the effective date. Time that has already been distributed will not be diluted. If you select this check box, the system will also select the **Distribute Costs** check box and it will be grayed out.

Min Qty (minimum quantity)

Use **Min Qty** to assist you in defining your limits for time entry for any TRC Type. For example, if minimum is set at 4, and you enter 2, the system will generate an exception stating that you entered an amount below the minimum for this TRC. This field should not be used if the TRC is synchronized with a **Flat Amount** NA Earnings Code.

Multiplication Factor

Use the **Multiplication Factor** to calculate hourly earnings, such as overtime or double time, for which the earnings are multiplied by a specific number or factor: 1.5 for overtime, 2.0 for double time, and so on. If you change the value in this element, the system will display a message indicating that this change may invalidate estimates that are already calculated. This element is factored into the calculation of estimated gross for hours and units TRC Types.

Max Qty (maximum quantity)

Use **Max Qty** as you define your maximum limits for time entry for any TRC **Type**. For example, if maximum is set as **8**, and you enter **10**, the system will generate an exception stating that you entered an amount above the maximum for this TRC. This element should not be used if the TRC is synchronized with a Flat Amount NA Earnings Code.

Rate Adjustment Factor

Use the **Rate Adjustment Factor** to establish a dollar amount to apply to adjustments in pay rates. For example, if your union negotiated a \$0.30 per hour cost of living adjustment, you would enter 0.3 in this field for any applicable earnings, such as regular, overtime, vacation, and sick. Any employee getting any one of these types of earnings will be paid \$0.30 per hour, in addition to the compensation rate specified on their job record. This element is factored into the calculation of estimated gross for hours and units TRC Types.

Flat Amount

The Flat Amount only displays if you are synchronizing your TRC to a NA Earnings Code with a Flat Amount Payment Type. This is to assist you in knowing how the Earnings will be paid if your are using NA Payroll. If you report a QTY that differs from the defined Flat Amount, you can include a delivered rule in your Rule Program that will replace the QTY with the defined Flat Amount on the TRC.

The system handles this field differently based on your synchronize selections. See the table under Synchronizing TRCs With NA Earnings Codes for a description of these differences.

Rate

The Rate only displays if you are synchronizing your TRC to a NA Earnings Code with a Unit/Override Payment Type. This is to assist you in knowing how the Earnings will be paid if you are using NA Payroll. If you report an Override Rate that differs from the defined Rate, you can include a delivered rule in your Rule Program that will replace the Override Rate with the defined Rate on the TRC.

This element is factored into the calculation of estimated gross for **hours** and **units** type TRCs.

The system handles this field differently depending on your **Sync** elections. See the table under Synchronizing your TRCs With NA Earnings Codes for a description of these differences.

Distribute Costs

Select the **Distribute Costs** check box to tell the system whether you want this TRC to participate in the Labor Distribution process when costs are returned from a payroll system. During the synchronize process with a NA Earnings Code, the value of this field will default from the Add to Gross Flag on the NA Earnings Code. You can change this value after the sync process. In most cases, earnings add to Gross Pay. However, certain types of earnings may not. One example is an earnings that does not actually consist of dollars paid, such as the value of a company-supplied automobile. Because the company supplies the employee with a car and not the money to buy one, these earnings should not add to gross.

Mapping to Earning Codes

Payroll System

Select the **Payroll System** from which you want to select an Earnings Code and ultimately map to the TRC. If you selected to **Map to NA Earnings Code** and **Synchronize** fields, the system automatically populates this element. You can choose to map this TRC to several Payroll Systems by clicking the + button to insert new rows and entering the appropriate data. The values for the Payroll System default from the values you setup your Pay System Options page. You don't have to save the page and return to establish a TRC relationship with multiple Payroll Systems.

Earnings Code

When you select a **Payroll System** and tab out of the element, the system displays the **Earnings Code** field. Now, you can select the Earnings Code you want to map to this TRC. If you selected to **Map to NA Earnings Code** and **Synchronize** fields, the system automatically populates this field making it unavailable for entry.

The values displayed in the drop-down list depend on the Payroll System that you have selected. If you chose NA Payroll, the list comes from the North American Payroll Earnings Code Table, if you selected GP Pay, the values come from the Global Payroll Earnings Code Table.

Note. When you manually map a TRC to a GP code, we only display *active* Earnings and Take Codes. If you need to inactivate a Pin code on the Payroll side after mapping a TRC, you need to look at the TRCs to which the code is attached and inactivate the mapping here. The same is true if you manually map a TRC to a NA Earnings Code.

You can also use this element to establish a TRC that calculates Estimated Gross a different way than how the NA Earnings Code may be paid. In this case, you would not use the Synchronize feature for mapping the TRC to a NA Earnings Code.

Status

Select a **Status** for the Earnings Code mapped to this TRC. Valid values are **Active** and **Inactive**. If you selected to **Map to NA Earnings Code** and **Synchronize** fields, the system automatically populates this field for you, and it is unavailable for entry. If you manually choose a Payroll System and Earnings Code, the system populates this field with the status of the Earnings Code, which you can change, if necessary. If you change the status to **Inactive**, you are inactivating the relationship between the TRC and Earnings Code. You are not inactivating the TRC itself.

If the **Status** of the Earnings Code mapped to the TRC changes, the system automatically displays the changed status of the Earnings Code in this field for TRCs synchronized with NA Payroll Earnings Codes. You have to manually change the status for TRCs mapped to Global Payroll or other pay systems.

Global Payroll Field (When GP Absence Flag Is Selected)

GP Payroll Take Code (global payroll take code)

Select the **GP Payroll Take Code** that you want mapped to this TRC. In Global Payroll (GP), you create a Take Code for each type of valid absence. The take element is a rule that defines the conditions that must be met in order for an absence to be paid. When entering absences, you need to enter the appropriate Take Code so the system can track absences properly and apply the correct rules for compensation.

If you are using GP with PeopleSoft Time and Labor, you must enter all absences through GP.

GP Earnings Code (global payroll earnings code)

Select the **GP Earnings Code** for mapping costs back to Time and Labor from GP.



For more information about Time and Labor interfacing with Global Payroll, see Using Interfaces for Payroll and Distribution, Integrating with PeopleSoft Global Payroll.

TRC 2 Page

Usage	Use the TRC 2 page to setup your compensation and interface options. Also you can enter any comments you want for this TRC.
Object Name	TL_TRC_PNL2
Navigation	Define Business Rules, Define Time and Labor, TRC, TRC 2
Prerequisites	None
Access Requirements	TRC Name

TRC 1 TRC 2

Time Reporting Code: REG1 Map to NA Earnings Code: REG

View All First 1 of 1 Last

Effective Date: 08/28/2000 Status: Active

Description: Short Description:

Type: Hours *Effect On Comp/Leave: CT Earned

Hours Represent Indicator

☒ Actual Hours ☐ Compensation Only Hours

Interface Options

☐ Send to Payroll ☐ Send To TCD

Comment:

TRC 2 page

Hours Represent Indicator

Actual Hours

Select this option to specify that the reported hours represent **Actual Hours** worked.

Compensation Only Hours

Select this option to specify whether the reported hours represent **Compensation Only Hours**. For example, in administering overtime, you may define a rule stipulating that an employee is entitled to time and a half for all hours worked beyond 8. So, if the employee works 10 hours, they get a premium for the 2 extra hours worked—the premium being the "half" of "time and a half." In this scenario, you want to be able to report the premium hours as **Compensation Only Hours**. Units and Amount TRCs should be Compensation Only.

These options provide information only for the time that is reported and are not used in rules processing. You can use these options for reporting purposes.

Interface Options**Send to Payroll**

The system selects this flag if any Earnings Code is mapped to the TRC; if one is not, the system clears it. The system only extracts Payable Time for a pay system that has the **Send to Payroll** Flag selected.

The system uses this flag to determine what time should be closed that is not going to a payroll system. When the **Send to Payroll** Flag is cleared, Time Administration sets the time to a Needs Approval payable time status.

If the TRC is synchronized with a NA Earnings Code and you decide to inactivate or delete a row on the NA Earnings Code, we recommend that you re-synchronize the TRC so that the attributes such as this flag are kept correctly synchronized.

Send to TCD

Select this flag if you want this TRC sent to your Time Collection Device (TCD). You attach a TRC Program to a TCD and if the TRC is part of that TRC Program, it will get sent to your TCD.

For more information about Time and Labor interfacing with Time Collection Devices, see PeopleSoft 8 Time and Labor, "Using Time Collection Devices".

Effect on Comp/Leave

Select **No Effect**, **CT Earned**, **CT Taken**, or **Leave Taken**, for this TRC from the drop-down list. Select **CT Earned** (comp time earned) if you want this TRC to be used for earnings for Comp Time that are in lieu of overtime. You should map your Comp Time Earned TRC to a NA Earnings Code that does not add to gross pay. Select **CT Taken** (comp time taken) if you chose to map to a NA Earnings Code that adds to Gross Pay. **Comp Time Earned** and **Comp Time Taken** TRCs can be associated to a Compensatory Time Off Plan in order for them to be displayed in the Weekly reporting pages. They must exist in the time reporter's TRC Program and assigned Comp Plan in order for Compensatory Time Off to be validated correctly.

Select **Leave Taken** (leave taken) for TRCs such as vacation, sick, or leave time. In order for the system to process Leave Time correctly, make sure you map the **Leave Taken** TRC to a NA Earnings code that has a Payment Type of **Either Hours or Amounts, Hours Only**, or **Both Hours and Amounts**. You must ensure that your NA Earnings Code is associated to a Leave Plan Type and you have selected the Taken check box under the Add to Accrual Balance section of the Earnings Code setup. Also make sure the time reporter is assigned to a Leave Plan Type of **Sick, Vacation**, or whatever Leave Plan Type you want to use, as well as having the association to a specific Leave Plan.

CT Earned, **CT Taken**, or **Leave Taken** TRCs must have a TRC Type of **Hours**. You cannot change these values if the TRC is attached to an active Comp Time Plan.

If the Time Reporter enters a negative amount for **Comp Time Earned** or **Comp Time Taken**, the system will consider it an adjustment. If the Time Reporter enters a negative amount for **Comp Time Taken**, the system will create a refund for the Time Reporter's balance. If the Time Reporter enters a negative amount for **Comp Time Earned**, the system will deduct the amount from the Time Reporter's balance.

Comment

Enter **Comments** to describe details about the TRC when used in reporting time. For example, you may want to record information for this TRC about why an employee was absent, or you may want to include specific information about meetings.

TRC Program Page

Usage	Use the TRC (Time Reporting Code) Program Page to define the TRCs that will belong to a TRC Program.
Object Name	TL_TRC_PGM_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, TRC Program
Prerequisites	You must first define your Time Reporting Codes using the TRC Setup Page.
Access Requirements	Enter a TRC Program ID

TRC Program

TRC Program ID: KUTP1

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Basic TRC Program 1 Short Description: TRC Basic1

Valid Time Reporting Codes View All First 1-5 of 8 Last

*TRC	Description
KUCE1	Services Comp Time Earned
KUCT1	Services Comp Time Taken Plan
KUHOL	Holiday (Statutory)
KUJUR	Paid Jury Leave
KUOVT	Overtime

TRC Program page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, and **Short Description**.

TRC Program ID

This field reflects the value that you entered to access this page.

Valid TRCs for Program

TRC

Select the **TRCs** valid for this TRC Program. You will assign the TRC Program to a workgroup. Keep adding rows and TRCs until you have entered all the TRCs valid for this TRC Program. When you select tab to move out of the TRC field, the system displays the **Description** for the TRC.

Copy TRC Program Page

Usage	Use this Page to copy a Time Reporting Code Program to use when creating a new Time Reporting Code Program.
Object Name	TL_TRC_SAVE_AS_PNL
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Copy TRC Program
Prerequisites	You must first define your Time Reporting Codes using the TRC Setup Page, and then your TRC Programs using the TRC Program Page.
Access Requirements	Enter the TRC Program ID from which you want to copy.

Copy TRC Program

Source TRC Program

TRC Program ID:	KUTP1	Effective Date:	01/01/1980
Description:	Basic TRC Program 1	Short Description:	TRC Basic1

Target TRC Program

TRC Program ID:	KUTP2
Effective Date:	08/01/2000 BY
Description:	Basic TRC Program 2
Short Description:	TRC Basic 2

Copy TRC Program page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, and **Short Description**.

Source TRC Program

The system displays the **TRC Program ID** from which you want to copy values for your Target TRC Program. The system also displays the **Effective Date** for this row of the **TRC Program ID**, a **Description**, and **Short Description** for the **Source TRC Program**.

Target TRC Program

TRC Program ID

Enter a new TRC Program ID for your Target TRC Program. After saving the page, you can return to the TRC Program page in correction mode to make changes.

TRC Examples

Synchronizing an Hours Type TRC (RGR) to a NA Earnings Code (Hours Only) of REG

- Create an Earnings Code = **REG** with an Effective dated row of 1/1/1900.
- Create a new TRC called **RGR** with an effective dated row of **2/25/2000**. (This is the current date for our example.)
- In the **Description** element, enter Regular Pay.
- In the **TRC Type** element, select **Hours**.
- Because it is an hours TRC, include it in Labor Dilution processing by selecting the **Used in Labor Dilution** check box. The system will also automatically select the **Distribute Costs** checkbox. The TRC will be labor distributed and diluted during processing.



For more information about Labor Distribution and Labor Dilution see Using Interfaces for Payroll and Distribution Purposes, Labor Distribution and Dilution.

- Go to **Map to NA Earnings Code** and select **REG** from the list.
- Click on the **Synchronize** button. You will receive the following message:

Do you wish to Sync this TRC to the selected North American Earnings Code? (13500,143) If you press OK then all the effective dated rows of the selected North American Earnings Code will be copied over to the TRC table. Any future changes to the North American Earnings Code will be automatically updated to the TRC table.

- Click **OK**.

You now have 2 rows for the TRC, one for the current date (2/25/2000) and one with the date of the NA Earnings Code 1/1/1900.

TRC 1 TRC 2

Time Reporting Code: RGR Map to NA Earnings Code: REG Unsync

View All First 1 of 2 Last

*Effective Date: 02/25/2000 *Status: Active

*Description: Regular Short Description: Regular

*Type: Hours ☒ Used In Labor Dilution

Min Qty: Max Qty: ☒ Distribute Costs

Multiplication Factor: 1.0000

Rate Adjustment Factor:

Mapping To Earning Codes View All First 1 of 1 Last

Payroll System	Earnings Code	Status
NA	REG	Active

2nd Row of TRC with date of 2/25/2000

The following fields and their values are inherited from the NA Earnings Code

- The Description and Short Description from the NA Earnings Code
- The Multiplication Factor from Earnings Table 3.
- The Default value of the Add to Gross Pay on Earnings Table 2 populates the Distribute Costs Flag.
- The Status of the TRC defaults to Active.
- The Mapping to Earnings Code section displays the Pay System and Earnings Code this TRC is now synchronizing to.

Once you save this TRC, the Send to Payroll Flag is automatically selected for you, as this is a system-controlled element populated when a TRC is mapped to any active Earnings Code.

Synchronizing a Units Type TRC (PIECE) to a NA Earnings Code (Unit/Override Rate) of PWK:

- Create an Earnings Code = **Piecework** with an effective dated row of 1/1/1980
- Create a new TRC called Piece with an effective dated row of 2/25/2000
- In the **TRC Type** element, select **Units**.
- Select **Square Mile** as the **Unit of Measure**. **Note:** The Unit of Measure can be populated by you manually on the Unit of Measure page under Define Time and Labor, Setup 1, if you are not using PS Projects. If you are, the values for Unit of Measure will automatically be

populated for you through Application Messaging, with the UOM_FULLSYNCHRONIZE message.

- Go to **Map to NA Earnings Code** and select **PWK** from the list.
- Click on the **Synchronize** button.

You now have two rows for the TRC, one for the current date 2/25/2000 and one for date of the NA Earnings Code for 1/1/1980

TRC 1 TRC 2

Time Reporting Code: PIECE

Map to NA Earnings Code: PWK [Unsync]

View All First 1 of 2 Last

*Effective Date: 02/25/2000 *Status: Active

*Description: Piecework Short Description: Piecework

*Type: Units Unit of Measure: SQM

Min Qty: Max Qty: ☒ Distribute Costs

Multiplication Factor: 1.0000 Rate: 0.250000

Rate Adjustment Factor:

Mapping To Earning Codes View All First 1 of 1 Last

Payroll System	Earnings Code	Status
NA	PWK	Active

TRC page synchronized to Piecework Earnings Code

The following fields and their values are inherited from the NA Earnings Code

- The Description and Short Description from the NA Earnings Code
- The Multiplication Factor from Earnings Table 3.
- The Rate Adjustment Factor from Earnings Table 3.
- The Rate from Unit/Override Rate value on Earnings Table 1.
- The Default value of the Add to Gross Pay on Earnings Table 2 populates the Distribute Costs Flag.
- The Status of the TRC defaults to Active.
- The Mapping to Earnings Code section displays the Pay System and Earnings Code this TRC is now synchronized to.

Synchronizing an Amounts Type TRC On-Call to a NA Earnings Code (Flat Amount) of OCP:

Perform the following to Create your TRC

- Create an Earnings Code = **OCP** with an effective date of 2/25/2000.
- Create a new TRC called **ONCAL** with an effective dated row of 2/25/2000.
- In the TRC Type element, select **Amount**, when you tab out of the field Currency Code appears.
- Select a Currency Code of **USD**.
- Go to Map to NA Earnings Code and select **OCP**.
- Click on the **Synchronize** button.

TRC 1 TRC 2

Time Reporting Code: ONCAL

Map to NA Earnings Code: OCP Unsync

View All First 1 of 2 Last

*Effective Date: 02/25/2000 *Status: Active

*Description: On-Call Pay Short Description: OnCall Pay

*Type: Amount Currency Code: Distribute Costs

Min Qty: Max Qty:

Multiplication Factor: 1.0000 Flat Amount: 12.000000

Rate Adjustment Factor:

Mapping To Earning Codes View All First 1 of 1 Last

Payroll System	Earnings Code	Status
NA	OCP	Active

Synchronizing a TRC with a NA Earnings Code of On-Call (ONCAL)

There is only one effective dated row for 2/25/2000, because your NA Earnings Code BNS has the same effective date as the effective date you entered for your TRC.

The following fields and their values are inherited from the NA Earnings Code

- The Description and Short Description
- The Flat Amount is populated into the Per Instance field from Earnings Table 1.
- The Multiplication Factor from Earnings Table 3.
- The Default value of the Add to Gross Pay from Earnings Table 2 populates the Distribute Costs Flag.

- The Status of the TRC defaults to ***Active***.
- The Mapping to Earnings Code section displays the Pay System and Earnings Code to which this TRC is now synchronized.

CHAPTER 5

Defining Task Reporting Requirements

With PeopleSoft Time and Labor, you can track time at the level of task detail your organization requires and allocate costs accordingly. We use the term *task* to refer to a set of attributes of reported time, such as department, product, or project, that more precisely identify how or where time was spent.

You can specify the types of task information you want to capture for each time reporter. For example, you may want sales staff to account for their time by customer and product; project managers to account for their time by project and activity; and administrative staff to report their time without task detail. Task templates, task profiles, and taskgroups are the tools that make this possible.

Taskgroups serve another important function: they are the means by which you assign default time reporting templates to time reporters. So, even if you're not interested in capturing task data for time reporters, you need to create taskgroups and assign a taskgroup to each time reporter.



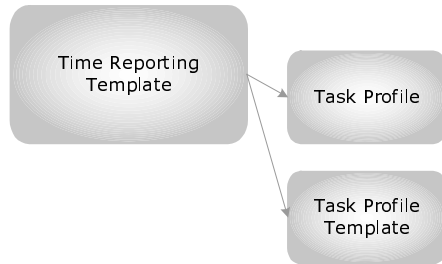
Some organizations refer to taskgroups as labor classes or labor class rate groups.



For more information about Time Reporting Templates, see [Creating Time Reporting Templates](#).

Understanding Task Functionality

Task reporting is a subset of time reporting. You specify the types of information you want to collect from time reporters by creating time reporting templates described in the Reporting Time section of this book. You specify the task-related data you want to collect by designating the use of either a task profile or a task template on the time reporting template. You'll learn the difference between task templates and task profiles later in this document.



Time reporting templates identify how task data will be collected

Task Reporting Tools

Now, let's talk about the tools you'll be using to define your organization's task reporting requirements.

Task Entities

In PeopleSoft Time and Labor, a task represents work assigned to a time reporter, and is represented by a combination of task entities.

Task entities, also called task elements, are the specific types of task data you can capture when time is reported: customer, task, product, project, activity, company, account code, department, business unit, job code, position number, location code, and up to five user-defined categories. Additional task entities are available if you're using PeopleSoft Projects with Time and Labor.

Task Template

Task templates control the task fields that appear on the time reporting pages. They also control what task data your time collection devices (TCDs) collect from time reporters. You select the task entities you want the members of a taskgroup to report their time to—company, department, or project, for example—through the task template. You also identify whether each type of information is required or optional.

Task Profile

Task profiles enable you to select task values for the task entities defined on your task template. You select the values for each task entity that's defined on a task template. For example:

Project : PS Payroll
Activity: Sales
Department Marketing
Business Unit USA

You also specify how reported time is to be allocated across tasks: by percentage, quantity, or equally.

You can create multiple task profiles from the same task template.

When time is entered or generated for a time reporter who uses task profile reporting, the system refers to the task profile to determine which task values to assign – limiting the data the time reporter needs to enter.

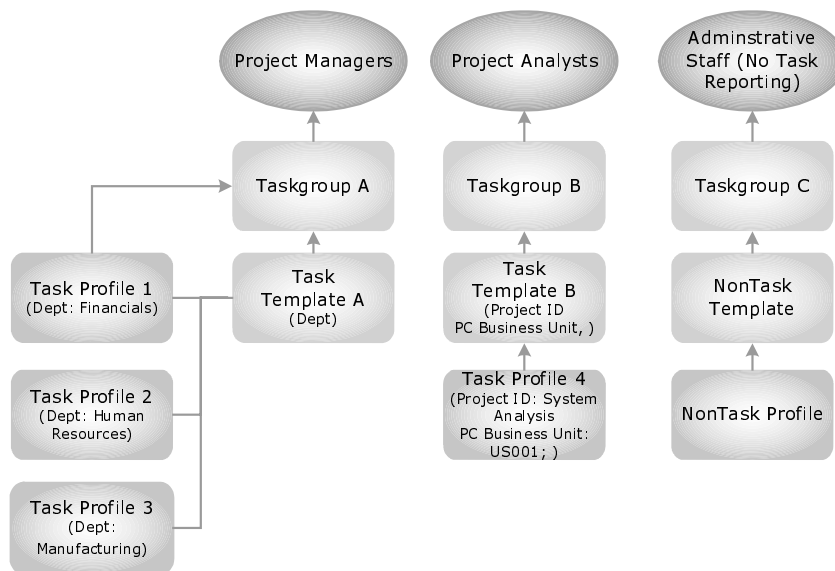
Note: Task profiles provide one way to supply values for task entities. Time reporters can also positively report task values if they use task template reporting, rather than task profile reporting.

Taskgroup

A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for time reporters with the same task reporting requirements. Each time reporter must be associated with one taskgroup, but the taskgroup assignment can be overridden when reporting time.

To summarize, each time reporter is assigned to a taskgroup. Each taskgroup is linked to a task template that identifies the types of task information the taskgroup members can report. Each taskgroup also specifies one or more task profiles that taskgroup members can use. Taskgroup members can report time through the use of task profiles or can report time to the individual task entities that are defined on a task template.

The following schematic represents the relationships between time reporters, taskgroups, task templates, and task profiles.



Relationship of time reporters, task profiles, task templates, and taskgroups

Types of Task Reporting

PeopleSoft Time and Labor supports two types of task reporting:

- Task template reporting.

When a person uses task template reporting, she can report time to the task entities you selected when defining the task template. For example, if you create a template called Sales, and select Customer, Product, and Task as the task entities, a time reporter who uses the Sales template to report time, might report the following information: 8 hours for Customer A, Product B, and Task C. Task template reporting is appropriate for time reporters who spend varied amounts of time on functions that require different cost allocations.

- Task profile reporting.

When a time reporter uses task profile reporting, he simply reports the quantity of time worked—the system automatically determines the task entities to which time is reported and how much time is allocated to each task, based on the person's task profile. For example, assume a time reporter is assigned to a taskgroup that is associated with the following task profiles: Filing, Drafting, Sorting, and Etching. Each task profile represents a different set of task entities and allocations. The time reporter can use any of these task profiles to enter time, or can "borrow" a taskgroup to which he is not assigned and use the task profiles associated with that taskgroup as well. So, if our time reporter uses the Etching profile to enter 8 hours, and the profile specifies that 25% of the reported time goes to Polishing and 75% of the reported time goes to Buffing, the system will automatically allocate 2 hours to Polishing and 6 hours to Buffing. Task profile reporting is appropriate for time reporters who perform the same sets of tasks, where cost allocation is static.

If you're not interested in capturing task data for some or all time reporters, you can use the nontask templates delivered with Time and Labor. See Defining Taskgroups later in this section for information about non-task reporting.

Default Reporting

You can designate which task profile applies to a time reporter on more than one page. The system uses the following hierarchy to determine which task profile to use.

- The task profile entered on a time reporting page, if any, always take precedence.
- The task profile directly assigned to the time reporter on the Create Time Reporter Data page or Maintain Time Reporter Data page has second priority.
- The default task profile assigned to the time reporter's taskgroup on the Taskgroup page is used only when the system finds no other.



Note. PeopleSoft Time and Labor enables you to override a time reporter's taskgroup when entering time. Taskgroup overrides, also referred to as taskgroup borrowing, enable time reporters to report time using the task profiles or task elements associated with the borrowed taskgroup.

Task Reporting and Referential Integrity

When you make a change to one area of PeopleSoft Time and Labor, Referential Integrity makes sure the changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or employee related data that could invalidate related objects or values in the system.

The following tables describe Referential Integrity actions when certain changes, inactivations, or deletions are made during task processing.



For more information about the Referential Integrity feature within PeopleSoft Time and Labor see Referential Integrity in this PeopleBook.

Prevention of Inactivation or Deletion of Effective-Dated Rows

The following table lists the pages and conditions when the system will not allow the inactivation or deletion of effective-dated rows.

Page	Condition
Taskgroup	You cannot inactivate a taskgroup that is assigned to a time reporter through the Create/Maintain Time Reporter Data page.

Page	Condition
	You cannot inactivate a taskgroup that is assigned to a time collection device (TCD) on the TCD Taskgroup page.
	You cannot delete an effective-dated row if it invalidates the association to a time reporter.
	You cannot delete an effective-dated row if it invalidates the association to a TCD Group.
Task profile	You cannot inactivate a task profile that is assigned to a taskgroup.
	You cannot delete an effective-dated row if it invalidates the association to a taskgroup..

Execute Edit Error Checking

You cannot change the minimum effective date on a page to be less than the minimum effective date of a field that acts as a prompt on this page.

Page	Prompts on Page
Taskgroup	Task Profile

Nested Effective Dates

You cannot change the effective date of the prompt table to be greater than the effective date of the target table.

Prompt Table	Target Table
Taskgroup	Create/Maintain Time Reporter Data TCD Setup
Task Profile	Taskgroup
Taskgroup Profile	Taskgroup



For more information about how the system reacts on nested effective-dated tables, see Understanding Nested Effective-Dated Tables in this book.

Task Reporting with PeopleSoft Financials

PeopleSoft Projects

When you integrate PeopleSoft Time and Labor with PeopleSoft Projects, you have additional options for tracking time at the task level. You can track time by business unit; by the projects and activities defined in PeopleSoft Projects; and by resource type, resource category, and resource sub-category. Valid values for these task entities come directly from PeopleSoft Projects through application messaging technology and can be viewed through the following pages in PeopleSoft Time and Labor:

Business Unit PC page
PC Project page
PC Activity page
Resource Type page
Resource Category page
Resource Sub-category page

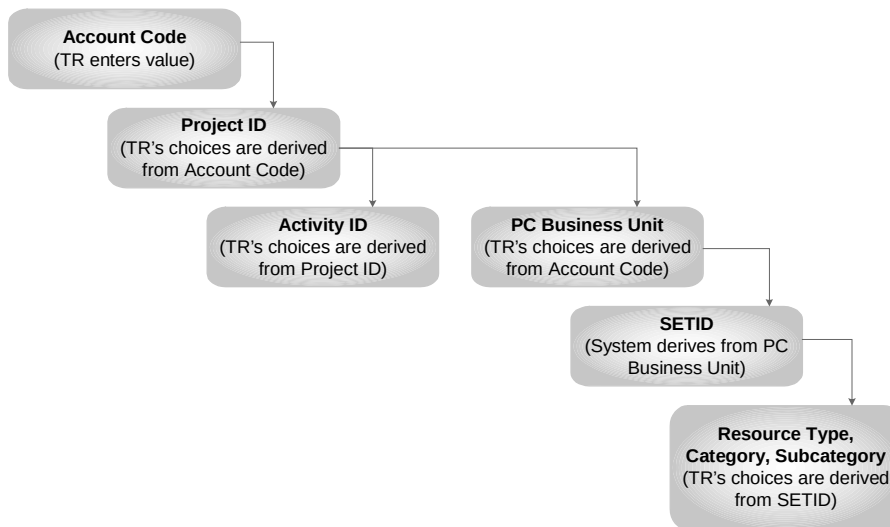


For more information about integrating PeopleSoft Projects with Time and Labor, see PeopleSoft Projects Integration.

PeopleSoft Projects with Commitment Accounting

Commitment accounting, an optional feature of PeopleSoft Financials and Human Resources Management, provides a structured set of accounting rules that may affect task reporting. When you select the Commitment Accounting option when creating a task template, *Account Code* becomes a required task entity. When an account code is entered during time reporting, two things happen:

- Based on the account code, PeopleSoft Time and Labor automatically populates the following ten, related fields: Account, Fund, DeptID, Program Code, Class, Affiliate, Operating Unit, Alternate Account, Project ID, and Product.
- The values of several other task entities are derived from the account code and from integration with PeopleSoft Projects. The hierarchy the system follows to derive values for related task entities is illustrated below.



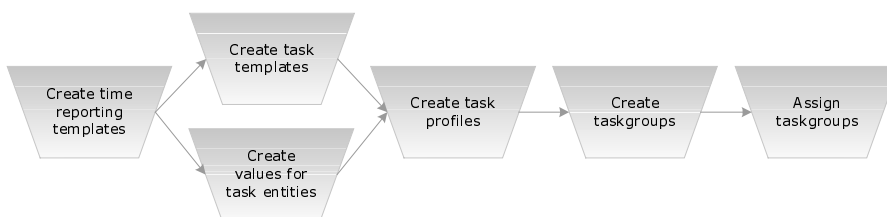
Task values derived from the account code when commitment accounting is enforced



For more information about integrating commitment accounting with task reporting functionality, see [Commitment Accounting](#).

Sequence for Defining Task Functionality

The flowchart below illustrates the sequence of steps necessary to define your task reporting requirements. We discuss each of these steps briefly in this section.



Establishing Task Reporting Requirements

To define task reporting requirements for your organization:

1. Create time reporting templates.

Use the Time Reporting Template page to create templates for elapsed time and punch time reporting. On the template, select the Task Profile or Task Template check box to indicate the type of task reporting for which the template is designed. You must create time reporting templates before you can create taskgroups.

2. Create task templates.

Use the Task Template page to select the task entities that you want to appear on the time reporting pages or that you want your time collection devices (TCDs) to capture from time reporters.

You can create task templates before or after you create values for task entities.

3. Create values for task entities (optional).

If you want employees to report time by customer, product, activity, task, project, and/or up to five user-defined task categories, define the set of valid values that can be used for time reporting. For example, if you want to account for time by customer, set up a code for each customer.

If PeopleSoft Projects is integrated with PeopleSoft Time and Labor, the Projects application uses application messaging technology to publish the valid values for additional task entities.

4. Create task profiles.

Use the Task Profile page to select the values for the task entities you selected on the task template. Also indicate whether time is to be allocated across tasks equally, allocated by percentage, or allocated by quantity.

5. Create taskgroups.

Use the Taskgroup page to identify the default time reporting templates, task template, and task profile(s) that are valid for time reporters with the same task reporting requirements.

Before you can define taskgroups, you must create time reporting templates for elapsed and punch time reporting.

6. Assign taskgroups, task templates and task profiles.

- Assign a taskgroup to each time reporter via the Create Time Reporter Data page or Maintain Time Reporter Data page. You can also assign a task profile to each time reporter. The task profile you select will take precedence over the default task profile assigned to the time reporter's taskgroup.
- If you're using time collection devices, assign the appropriate taskgroups to each TCD via the TCD Setup page. The taskgroup determines what profiles and templates will be available to send to the TCD. You can also specify whether to send task profiles, task templates, and/or task values to the TCD.

Before You Begin

Before you begin to define task templates, task profiles, and taskgroups, spend some time analyzing your organization's task-reporting requirements. Determine which time reporters share the same or similar reporting requirements, perhaps based on the kind of work they perform, and what those specific requirements are. One taskgroup can include elapsed and punch-time employees—employees and non-employees—as long as the same task entities apply to everyone in the taskgroup.

Creating Task Templates

Use the Task Template page to select the types of task information you want taskgroup members to provide when reporting time.

For example, if a group of time reporter's does project work, such as developing software, you might want to create a task template that captures the project and product they're working on, the department, and individual tasks. If you're creating a task template for a group of account managers, you may want to include customer, company, department, and account code. Each task template should represent a distinct set of task-related elements.

A task template must be assigned to each taskgroup. You can assign the same task template to more than one taskgroup or you can create a separate task template for each taskgroup. The task template assigned to a taskgroup controls which task profiles you can associate with the taskgroup.

Modifying a Task Template

Once you save a task template, the types of changes you can make to it depend on whether the template has been associated with a taskgroup and/or if the system is in production mode. When in production mode, the Production Environment option on the TL Installation page is selected. The table below shows the restrictions that are in place to enforce referential integrity.

<i>Production Mode?</i>	<i>Template Assigned to Taskgroup?</i>	<i>Changes Permitted</i>
Yes	Yes	You can add optional fields and change required fields to optional. If you unintentionally included or excluded task entities when creating the task template, you can create a new template and change the task template assignment on the Taskgroup page. Changing the template will trigger referential integrity if time has already been reported for the taskgroup.
Yes	No	All changes are permitted.
No	Yes	All changes are permitted, with the exception of changing the commitment accounting option. Changes may trigger referential integrity.
No	No	All changes are permitted.



For more information about referential integrity, see Understanding Referential Integrity.

Task Template Page

Usage	Use the Task Template page to select the types of task-related data you want a group of employees to report their time to (such as company, business unit, department, and so forth).
Object Name	TL_TSKPRF_TMPLATE
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Task Template
Prerequisites	None.
Access Requirements	You must enter the Task Template ID.

Task Template

Task Template ID: KUTSKPRFT2 ☒ Used by Taskgroup(s)

'Description: BU HR, Dept, JobCd, Pos Num
 Short Description: Temp 2
 ☐ Commitment Accounting

HR & TL Entities	Financials Entities	User Entities
☐ Company Not Used	☐ Account Code Not Used	☐ User Field 1 Not Used
☒ Business Unit HR Optional	☐ PC Business Unit Not Used	☐ User Field 2 Not Used
☐ Location Not Used	☐ Business Unit PF Not Used	☐ User Field 3 Not Used
☒ Department ID Optional	☐ Project ID Not Used	☐ User Field 4 Not Used
☒ Jobcode Optional	☐ Activity Not Used	☐ User Field 5 Not Used
☒ Position Number Optional	☐ Resource Type Not Used	
☐ Product Not Used	☐ Resource Category Not Used	
☐ Customer Not Used	☐ Resource Subcategory Not Used	
☐ Task Not Used		

Task Template page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description.**

Task Template ID

This field displays the name of the task template.

Used by Taskgroup

This is a display field. When selected, it indicates that the task template has been assigned to a taskgroup and the modifications you can make to the template are limited.

If the system is in production mode (the Production Environment option on the TL Installation page is selected) you can add optional fields to the template and change required fields to optional.

If the system is not in production mode, you can make any changes to the template except change the commitment accounting option.

Commitment Accounting

Select this check box if your organization uses commitment accounting. If selected, **Account Code** becomes a required field, and the **Product** and **Project ID** fields become unavailable.

If Interface with PS/Projects is selected on the TL Installation page, the **PC Business Unit** field also becomes available.

If Interface with PS/EPM is selected on the TL Installation page but Interface with PS/Projects is not, the **Business Unit PF** field becomes available.

Note. A task template that's defined for commitment accounting can only be attached to taskgroups set up for commitment accounting.

For more information about commitment accounting, see Commitment Accounting.

In the HR & TL Entities, Financials Entities, and User Entities group boxes, select each type of task data you want time reporters associated with this taskgroup to report. For each field you choose, select either **Required**, **Optional**, or **Not Used** in the drop-down list to the right.

If your organization uses commitment accounting, and/or PeopleSoft Projects (PS/Projects) or Enterprise Performance Management (PS/EPM), some of the task fields may be selected automatically or made unavailable. In the field descriptions below, we indicate when each field is available and what the corresponding default values are when fields are selected.



For more information about the valid values that users can enter in these fields, see Creating and Viewing Task Values later in this section.

HR & TL Entities

Company

Always available. When you select this check box, the default value is **Optional**.

Business Unit HR

Always available. When selected, Business Unit HR defaults to **Optional**. The check box is selected automatically when you select **Location**, **Department ID** or **Jobcode**. If you make any of these fields required, **Business Unit HR** is also required.

Location

Always available. When selected, Location defaults to **Optional**. **Location** is dependent on **Business Unit HR**. When you select **Location**, the system automatically selects **Business Unit HR** with the same default value.

Department ID

Not available when using commitment accounting. (Time and Labor will automatically determine the correct department ID based on the account code.) In all other cases, **Department ID** defaults to **Optional** when selected. **Department ID** is dependent on **Business Unit HR**. When you select **Department ID**, the system automatically selects **Business Unit HR** with the same default value.

Jobcode

Always available. When selected, Jobcode defaults to **Optional**. **Jobcode** is dependent on **Business Unit HR**. When you select **Jobcode**, the system automatically selects **Business Unit HR** with the same default value.

Position Number

Available only if using the Position Management feature and you have selected either *Full* or *Partial* on the HR Core Installation table. When selected, Position Number defaults to **Optional**.

Product

Not available when you're using commitment accounting. In all other cases, Product defaults to **Optional** when selected.

Customer

Always available. When selected, Customer defaults to optional.

Task

Always available. When selected, Task defaults to optional.

Financials Entities

Account Code

Automatically selected as a **Required** field when commitment accounting is in use. In all other cases, **Account Code** is available and defaults to **Optional** when selected.

PC Business Unit

Available only when Interface with PS/Projects is selected on the TL Installation page. In this case, **PC Business Unit** is selected automatically and defaults to *Optional*, though you can change it to *Not Used*. Exceptions are as follows:

If you make **Project ID**, **Activity**, **Resource Type**, **Resource Category**, or **Resource Subcategory** a *Required* field, **PC Business Unit** becomes a *Required* field.

If you also select Project ID and you are not using commitment accounting, PC Business Unit will be selected automatically and will take on the optional or required default value of Project ID.

Business Unit PF

Available only when Interface with PS/EPM is selected on the TL Installation page and the **PC Business Unit** on the Task Template page is not selected.

If Interface with PS/EPM is not selected on the TL Installation page, **Business Unit PF** is selected automatically and defaults to *Optional*.

If you make **Activity** a *Required* field, **Business Unit PF** also becomes a *Required* field (if PC Business Unit is not selected).

Project ID

Not available when you are using commitment accounting. (**Project ID** will be provided by the Account Code table.)

Project ID defaults to *Optional*, when selected, except as follows:

When Interface with PS/Projects is selected on the TL Installation page, **Project ID** is selected automatically as *Optional*. If you make **Activity ID**, **Resource Type**, **Resource Category**, or **Resource Subcategory** a *Required* field, **Project ID** becomes *Required*.

Project ID is dependent on **Business Unit PC**. When **Project ID** is selected, the system automatically selects **PC Business Unit**.

Activity

Activity defaults to *Optional* when selected, with the following exceptions:

When Interface with PS/Projects or Interface with PS/EPM is selected on the TL Installation page, **Activity** is selected automatically and defaults to *Optional*, however, you can change it to *Not Used*.

Activity is dependent on either **PC Business Unit** or **Business Unit PF**. If Interface with PS/Projects is selected, **PC Business Unit** must be selected before you can select **Activity**. If Interface with PS/EPM is installed without PS/Projects, **Business Unit PF** must be selected before you can select **Activity**.

Resource Type

Available only when Interface with PS/Projects is selected on the TL Installation page and the **PC Business Unit** field is selected. **Resource Type** defaults to *Optional*, when selected.



The dependencies between **Resource Type**, **Resource Category**, and **Resource Subcategory** check boxes are dynamic. When time is reported, PeopleSoft Time and Labor automatically adjusts the prompts for these fields according to the dynamic edit options defined for the PC Business Unit in PeopleSoft Projects. Prompt values also depend on the SetID associated with the reported PC Business Unit.

Resource Category

Available only when Interface with PS/Projects is selected on the TL Installation page and the **Business Unit PC** field is selected. It defaults to *Optional*, when selected.

Resource Subcategory

Available only when Interface with PS/Projects is selected on the TL Installation page and the **Business Unit PC** field is selected. It defaults to *Optional*, when selected.

User Entities**User Field 1 to 5**

Always available. The default is *Optional*.

Creating and Viewing Task Values

For each type of task data you want to track, there must be an underlying task prompt table that defines the set of valid values that users can enter when reporting time or that the system retrieves when generating time. Some of these underlying tables are defined in PeopleSoft Time and Labor; other tables are created in PeopleSoft Human Resources Management, Projects, and Enterprise Performance Management.

This section describes where the values for each task-related prompt table are defined; how to create valid values for the PeopleSoft Time and Labor prompt tables; and how to view the values defined in PeopleSoft Projects and Enterprise Performance Management.



For more information about integrating PeopleSoft Projects with PeopleSoft Time and Labor, see PeopleSoft Projects Integration.

Where Prompt Tables are Defined

The following table shows which PeopleSoft application you use to define task data used by PeopleSoft Time and Labor. Notice that a few of the task elements (activity, projects, and business unit) can be defined in more than one application.

<i>Time and Labor</i>	<i>Human Resources</i>	<i>Projects</i>	<i>Enterprise Performance Management</i>
Customer Task Product Project Activity User Fields 1 to 5	Company Business Unit HR Location Department ID Jobcode Position Number	Account Code Business Unit PC Business Unit PF Project Activity Resource Type Resource Category Resource Sub-category	Business Unit PF FS Activity

The table below lists where each set of task-related values is stored and tells you how to navigate to the pages where values are defined. For some task entities, this information depends on whether you're using PeopleSoft Financials (Projects and/or Enterprise Performance Management) and if you're using commitment accounting functionality. Values defined in PeopleSoft Financials can be viewed in Time and Labor, but can only be added or deleted in the application in which they are created.

<i>Task Entity</i>	<i>Table</i>	<i>Navigation</i>
Company	COMPANY_TBL	Define Business Rules, Manage Human Resources, Setup, Company Table
Business Unit HR	BUS_UNIT_TBL_HR	Define Business Rules, Manage Human Resources, Setup, Business Unit Table
Location	TL_LOCATION_VW	Define Business Rules, Manage Human Resources, Setup, Location Table Task values are based on setID for HR business unit.

Department ID	TL_DEPT_TBL_VW	Define Business Rules, Manage Human Resources, Setup, Department Table Not applicable when using commitment accounting. Task values are based on setID for HR business unit.
Jobcode	TL_JOBCODE_VW	Define Business Rules, Manage Human Resources, Setup, Jobcode Table Task values are based on setID for HR business unit.
Position Number	POSITION_DATA	Develop Workforce, Manage Positions, Use, Position Data Table
Product	TL_PRODUCT_TBL	Define Business Rules, Define Time and Labor, Setup2, Product Table Not applicable when using commitment accounting.
Customer	TL_CUSTOMER	Define Business Rules, Define Time and Labor, Setup2, Customer Table
Account Code	ACCT_CD_CA_VW	Define Business Rules, Define Payroll Process, Setup1, Account Code Table Used when commitment accounting in use. (Commitment Accounting Flag is set to Yes for the account codes.)
	TL_ACCT_NONCA_V	Define Business Rules, Define Payroll Process, Setup1, Account Code Table Used when commitment accounting does not apply. (Commitment Accounting Flag is set to No for the account codes.)
PC Business Unit	TL_BUS_CA_PC_VW	Display: Define Business Rules, Define Time and Labor, Setup2, PC Business Unit Add/update: Define Business Rules, Establish Business Units, Use N-Z, Projects Definition Used only if PeopleSoft Projects is installed and commitment accounting is used. Choices are restricted to business units that are compatible with the project ID from the Account Code table.
	BUS_UNIT_PC_VW	Same as above without commitment accounting.

Business Unit PF	BUS_UNIT_TBL_PF	Display: Define Business Rules, Define Time and Labor, Setup2, Business Unit PF Add/update: Define Business Rules, Establish Business Units, Setup, Performance Measurement Used only when PeopleSoft Enterprise Performance Management is installed and Projects is not.
Project	PROJ_TEAM_DVW	Display: Define Business Rules, Define Time and Labor, Setup2, PC Project. Add/update: Manage Projects, Maintain Projects, Use, Project General, Team Detail Used when PeopleSoft Projects installed, commitment accounting is not used, and team membership is enforced for all projects as designated on the business unit PC. Users can select only active projects to which time reporter is assigned.
	TL_PROJ_PC_VW	Same as above except used when team membership is not enforced. User can choose any projects within the business unit.
	TL_PROJECT	Define Business Rules, Define Time and Labor, Setup2, Project Used when PeopleSoft Projects is not installed and commitment accounting isn't used.
Activity	TL_PROJ_ACTV_VW	Add/update: Define Business Rules, Define Activities, Manage Projects, Maintain Projects, Use, Activity General Display: Define Business Rules, Define Time and Labor, Setup2, PC Activity ID Used when PeopleSoft Projects is installed. Choices are restricted to active activities.
	TI_FS_ACTV_VW	Add/update: Configure ABM, Setup, Activities, Define Activities Display: Define Business Rules, Define Time and Labor, Setup2, FS Activity Used when PeopleSoft Enterprise Performance Management is installed and Projects is not. Choices are restricted to active activities.

	TL_ACTIVITY	Define Business Rules, Define Time and Labor, Setup2, Activity ID Used when neither PeopleSoft Projects nor PeopleSoft Enterprise Performance Management is installed. Choices are restricted to active activities.
Resource Type	TL_PROJ_RTYPE_V	Add/update: Define Business Rules, Structure Projects, Use L-Z, Resource Types Display: Define Business Rules, Define Time and Labor, Setup2, Resource Type Used only when PeopleSoft Projects is installed.
Resource Category	TL_PROJ_CATG_V2	Add/update: Define Business Rules, Structure Projects, Use L-Z, Resource Categories Display: Define Business Rules, Define Time and Labor, Setup2, Resource Category Used only when PeopleSoft Projects is installed. If the resource category is related to resource type as defined on the Business Unit PC field.
	TL_PROJ_CATG_VW	Same as above, except table used when the resource category is not related to the resource type as defined on the Business Unit PC field.
Resource Subcategory	TL_PROJ_SUB_V2	Add/update: Define Business Rules, Structure Projects, Use L-Z, Resource Subcategories Display: Define Business Rules, Define Time and Labor, Setup2, Resource Subcategory Used only when PeopleSoft Projects installed. Table used when the resource subcategory is related to the resource category as defined on the Business Unit PC field.
	TL_PROJ_SUB_V	Same as above, except table used when the resource subcategory not related to the resource category as defined on the Business Unit PC field.
Task	TL_TASK	Define Business Rules, Define Time and Labor, Setup2, Task
User Fields 1 - 5	TL_USER_FIELD_1-5	Define Business Rules, Define Time and Labor, Setup2, User Field1-5



If you are not using PeopleSoft Projects or Enterprise Performance Management with Time and Labor, you may want to define your PeopleSoft security so that users see only the applicable menu items. See the *PeopleTools PeopleBook* for more information.

Defining Task Values in PeopleSoft Time and Labor

PeopleSoft Time and Labor is delivered with empty prompt tables for the Customer, Task, Product, Project, Activity, and five user-defined fields. If you want to track any of this information, follow the instructions in this section to define each set of valid values.

Customer Page

Usage	Use the Customer page to create and view codes for customers. For example, employees such as account managers may need to account for their time based on the customers with whom they spend it.
Object Name	TL_CUSTOMER
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Customer
Prerequisites	None
Access Requirements	Enter up to 10 alphanumeric characters for the customer code.

Customer page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.

Task Page

Usage	Use the Task page to create and view codes for specific tasks. For example, employees such as software developers may need to account for their time based on the tasks (coding, meetings and so on) they perform.
Object Name	TL_TASK
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Task.
Prerequisites	None.
Access Requirements	Enter up to 10 alphanumeric characters for the task code.

Task page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Product Page

Usage	Use the Product page to create and view codes for products. For example, employees such as software developers may need to account for their time based on the products they spend time developing. If you use commitment accounting, the system will use the product codes associated with the account code.
Object Name	TL_PRODUCT_TBL
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Product
Prerequisites	None.
Access Requirements	Enter up to 10 alphanumeric characters for the product code.

Product

Product: KUETBL

View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active + -

*Description: Furniture - End Table

Short Description: End Tbl

Product page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Creating Project Codes

Project codes identify projects. You might use the project code PRODTEST, for example, to identify the project called Project Testing. The page you use to create project codes depends on whether PeopleSoft Projects is integrated with PeopleSoft Time and Labor:

- If you're using PeopleSoft Time and Labor without PeopleSoft Projects, use the Project page to create project codes.
- If you're using PeopleSoft Projects, define project codes in the Projects application. You can then use the PC Project Descr page in PeopleSoft Time and Labor to view the codes but not to change them.

If you're using commitment accounting, PeopleSoft Time and Labor will use the project codes provided by the Account Code table.

Project Page

Usage	If you're using PeopleSoft Time and Labor without PeopleSoft Projects, use the Project page to create and view codes for projects. Do not use the Projects page if you're using commitment accounting.
Object Name	TL_PROJECT
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Project.
Prerequisites	None.
Access Requirements	Enter up to 10 alphanumeric characters for the project code.

Project page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Creating Activity ID Codes

Activity codes identify activities. For example, Schedule Production or Move Raw Material might be typical activity codes. The page you use to create activity codes depends on whether PeopleSoft Projects and/or Enterprise Performance Management are integrated with PeopleSoft Time and Labor.

- If you're using PeopleSoft Time and Labor without PeopleSoft Projects or Enterprise Performance Management, use the Activity ID page described below to create project codes.
- If you're using PeopleSoft Projects, you define activity codes in that application. You can then use the PC Activity ID pages in PeopleSoft Time and Labor to view the codes but not to change them.
- If you're using PeopleSoft Enterprise Performance Management (without PeopleSoft Projects) you define activity codes in the Enterprise Performance Management application. You can then use the View FS Activity page in PeopleSoft Time and Labor to view the codes but not to change them.

Activity ID Page

Usage	If you are using PeopleSoft Time and Labor without PeopleSoft Projects or Enterprise Performance Management, use the Activity ID page to establish codes for activity IDs.
Object Name	TL_TASK
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Activity ID
Prerequisites	None.
Access Requirements	Enter up to 10 alphanumeric characters for the activity ID code.

Activity ID page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.

Creating User Fields

If you'd like to report time against task elements that are not delivered with PeopleSoft Time and Labor, you can define values for up to five User Fields. The maximum length varies by user field:

User Field 1	10 alphanumeric characters
User Field 1	10 alphanumeric characters
User Field 1	15 alphanumeric characters
User Field 1	20 alphanumeric characters
User Field 1	20 alphanumeric characters



If you want to re-label the user fields, see the instruction in your *PeopleTools PeopleBook*.

User Field 1 Page

Usage	Use the User Fields page to create your custom task-reporting elements.
Object Name	TL_USER_FIELD#_PNL, where # equals 1, 2, 3, 4, or 5
Navigation	Define Business Rules, Define Time and Labor, Setup 2, User Field 1.
Prerequisites	None.
Access Requirements	Enter the alphanumeric code for the user field. The maximum number of characters you can enter varies by user field.

User Field 1

User Field 1: SAMPLE

View All First 1 of 1 Last

*Effective Date: 08/25/2000 *Status: Active + -

*Description: sample

Short Description: sample

User Field 1 page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.

Displaying Task Codes Defined in PeopleSoft Projects and Enterprise Performance Management

Prompt tables defined in PeopleSoft Projects and/or Enterprise Performance Management are available to PeopleSoft Time and Labor through our Publish and Subscribe technology. If you're using PeopleSoft Projects or Enterprise Performance Management, you can view the prompt values in PeopleSoft Time and Labor but not change them. To add or delete values, you must update the appropriate PeopleSoft Projects or Enterprise Performance Management page.



For more information about integrating PeopleSoft Time and Labor with PeopleSoft Projects or Enterprise Performance Management, see Integrating with PeopleSoft Financials.

View Business Unit PC Page

The PC Business Unit pages display business unit information defined in PeopleSoft Projects, if this application is installed.

Usage	If PeopleSoft Projects is installed, you can use the View PC Business Unit page to display business unit criteria defined through PeopleSoft Projects.
Object Name	TL_BUS_UNIT_TBL_PC
Navigation	Define Business Rules, Define Time and Labor, Setup 2, PC Business Unit,
Prerequisites	Business units must be defined in PeopleSoft Projects.
Access Requirements	You must select the code for the business unit you want to display.

View Business Unit PC	
Unit:	US003
Description:	US003 CALIFORNIA OPERATIONS
Short Desc:	US003
Currency Code:	USD
Rate Type:	CRRNT
Dynamic Edit Tables	
Category Edit Option:	Independnt
Category Edit Table:	PROJ_CATG_TBL
SubCategory Edit Option:	Independnt
SubCategory Edit Table:	PROJ_SUBCAT_TBL
Accounting Periods	
Calendar ID:	01

View Business Unit PC page



For more information about the fields on the Project Description page, see your PeopleSoft 8 Projects PeopleBook.

PC Project Descr Page

Usage	If PeopleSoft Projects is integrated with PeopleSoft Time and Labor, you can use the PC Project pages to display project codes defined through PeopleSoft Projects. If PeopleSoft Projects is installed, you can use the Project Description page to display project codes created through PeopleSoft Projects.
Object Name	TL_PROJECT_PC
Navigation	Define Business Rules, Define Time and Labor, Setup 2, PC Project
Prerequisites	Project codes must be defined in PeopleSoft Projects.
Access Requirements	Enter the business unit and the project/grant number.

PC Project Descr **Team Members**

Unit: US003 Project: BUILDING Building

Project Type: 00000 Enforce Project Team? ☐

View All First 1 of 1 Last

Date/Time Stamp: User ID:

Long Descr:

View All First 1 of 1 Last

Effective Date: 08/25/2000 Sequence: 0 Start Date: Percent Complete:

Status: End Date: Priority: 0

PC Project Descr page (PC Project Description page)



For more information about the fields on the PC Project Descr page, see the PeopleSoft 8 Projects PeopleBook.

Team Members Page

Usage	If PeopleSoft Projects is installed, you can use the Team Members page to display project information created through PeopleSoft Projects. The Team Members page is the second page in a two-component.
Object Name	PROJECT_TEAM_01
Navigation	Define Business Rules, Define Time and Labor, Set-up2, PC Project.
Prerequisites	Project codes must be defined in PeopleSoft Projects.
Access Requirements	Enter the business unit and the project/grant number.

PC Project Descr **Team Members**

Unit: US003 Project: BUILDING Building

View All First 1 of 1 Last

Team Member	Name	Project Role	Email Notify for Status Change	Start Date	End Date
1			☐		

Team Members page



For more information about the fields on the Team Members page, see the PeopleSoft 8 Projects PeopleBook.

View Project Activity Page

Usage	If PeopleSoft Projects is installed, you can use this page to view the activity codes defined in Projects but not to change them.
Object Name	PC_PROJ_ACTIVITY
Navigation	Define Business Rules, Define Time and Labor, Setup 2, PC Activity ID, View Project Activity
Prerequisites	Activities must be defined in PeopleSoft Projects.
Access Requirements	Enter the business unit and the project/grant number.

View Project Activity

Unit: US003 Project: BUILDING Building

Project Activity Detail View All First 1 of 1 Last

Activity Info Manager Info Project Info

Activity ID	Description
EXCAVATION	Excavation

View Project Activity: Activity Info tab (Activity Information tab)



For more information about the fields on the View Project Activity tabs, see the PeopleSoft 8 Projects PeopleBook.

View Project Activity: Manager Info Tab

View Project Activity

Unit: US003 Project: BUILDING Building

Project Activity Detail View All First 1 of 1 Last

Activity Info Manager Info Project Info

Activity ID	Activity Manager	Name
EXCAVATION		

View Project Activity: Manager Info tab (Manager Information tab)

View Project Activity: Project Info Tab

View Project Activity

Unit: US003 Project: BUILDING Building

Project Activity Detail View All First 1 of 1 Last

Activity Info Manager Info Project Info

Activity ID	Description	Percent Complete	Start	Finish	Actual Start	Actual Finish
EXCAVATION		0.00	02/23/2000	02/23/2000		

View Project Activity: Project Info tab (Project Information tab)

View Project Resource Type Page

Usage	Use the View Project Resource Type page to view resource type codes defined in PeopleSoft Projects.
Object Name	PROJ_RES_DEFN
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Resource Type.
Prerequisites	Resource types must be defined in PeopleSoft Projects.
Access Requirements	Enter the setID and resource type.

View Project Resource Type

SetID: HC Resource Type: AFUDC

View All First 1 of 1 Last

Effective Date: 01/01/1995 Status: Active

Description: AFUDC Interest

View Project Resource Type page

Resource type codes are applicable only if you're using PeopleSoft Projects. You can use the Resource Type page to view any resource codes defined in PeopleSoft Projects but not to update them.



For more information about the fields on this page, see the PeopleSoft 8 Projects PeopleBook.

View Project Resource Category Page

Usage	Use the View Resource Category page to view resource category codes defined in PeopleSoft Projects.
Object Name	PROJ_CATG_DEFN
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Resource Category
Prerequisites	Resource categories must be defined in PeopleSoft Projects.
Access Requirements	Enter a setID and a resource category.

View Project Resource Category

SetID: HC Resource Category: ADMIN

View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Description: Administration

Project Resource Category page

Resource category codes are applicable only if you're using PeopleSoft Projects. You can use the Resource Category page to view any resource category codes defined in PeopleSoft Projects.



For more information about the fields on this page, see the PeopleSoft 8 Projects PeopleBook.

View Project Resource Sub Catg Page

Usage	Use the View Resource Sub-Catg (sub-category) page to view resource sub-category codes defined in PeopleSoft Projects.
Object Name	PROJ_SUBCAT_DEFN
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Resource Sub-Category
Prerequisites	Resource sub-categories must be defined in PeopleSoft Projects.
Access Requirements	Enter the setID and resource sub-category.

View Project Resource Sub Catg

SetID: HC Resource Sub Category: KEYBD

View All First 1 of 1 Last

Effective Date: 10/03/1996 Status: Active

Description: Keyboard

View Project Resource Sub Catg page (View Project Resource Sub-Category page)



For more information about the fields on this page, see the PeopleSoft 8 Projects PeopleBook.

View Business Unit PF Page

Usage	Use the View Business Unit PF page to view business unit codes defined in PeopleSoft Enterprise Performance Management.
Object Name	TL_BUS_UNIT_TBL_PF
Navigation	Define Business Rules, Define Time and Labor, Setup 2 Business Unit PF
Prerequisites	You must define business units in Enterprise Performance Management.
Access Requirements	Enter the code for the business unit.

View Business Unit PF

Unit: CORP1

Description: Corp 1

Short Desc: Corp 1

Base Currency: USD As of Date: 01/01/1900

Rate Type: CRRNT

Default Properties

Calendar ID: 01

Last Batch Number: 23

View Business Unit PF page

Business Unit PF codes are applicable only if you are using PeopleSoft Enterprise Performance Management and you are not using People Soft Projects. You can use the Business Unit PF page to view any business units defined in Enterprise Performance Management but not to update them.



For more information about the fields on this page, see the *PeopleSoft Enterprise Performance Management PeopleBook*.

View FS Activity Page

Usage	If PeopleSoft Enterprise Performance Management is installed, you can use this page to view, but not change, the activity codes defined in Enterprise Performance Management.
Object Name	FS_ACTIVITY_TBL_1
Navigation	Define Business Rules, Define Time and Labor, Setup 2, FS Activity
Prerequisites	Activities must be defined in PeopleSoft Enterprise Performance Management.
Access Requirements	Enter the setID and activity ID.

View FS Activity page



For more information about the fields on the View FS Activity page, see the *PeopleSoft Enterprise Performance Management PeopleBook*.

Creating Task Profiles

Once you've created task templates and set up codes for the task entities you plan to use, you're ready to create task profiles. Task profiles enable you to specify default values for the task elements on the task template. You select the specific companies, departments, projects, and other tasks to which you want to allocate a person's reported time. You also specify how to

distribute reported time across tasks: by quantity, by percentage, or by distributing time equally across all tasks.

General rules for task profiles are as follows:

- You can create multiple task profiles from the same task template.
- You can assign multiple task profiles to a taskgroup however, all of the profiles must be based on the same template that's linked to the taskgroup.
- Task profiles are optional. If you do not want to use this functionality, you can attach the predefined Nontask task profile to the taskgroup you will assign to time reporters who are exempt from task profile reporting.

Task Profile Page

Usage	Use the Task Profile page to define a task profile.
Object Name	TL_TASK_PROFILE
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Task Profile
Prerequisites	You must have defined the task template ID.
Access Requirements	Enter up to 10 alphanumeric characters for the task profile ID.

Task Profile

Task Profile ID: KUTSKPRF1A View All First 1 of 1 Last

***Effective Date:** 01/01/1980 ***Status:** Active + -

***Description:** Services Task Profile 1 **Short Description:** Svcs 1 ☐ Send To TCD

***Task Template ID:** KUTSKPRFT1 Prod, Cust, Task, BU, Activity Change Task Template

Allocation Type

☐ Allocation by Quantity ☒ Allocation by Percentage ☐ Allocation Equally All Tasks

Allocation Detail - At least one row is required. View All First 1-2 of 2 Last

TL Fields **Projects Fields**

Allocation Amt	Product	Customer	Task
50.000000	KUHARC	CUST1	KUCNF
50.000000	KUSOFT	CUST2	KUIMP

Task Profile page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Send to TCD

Select this checkbox if you want to make the profile available to one or more time collection device (TCD). (You must also select the Send Task Profiles option on the TCD Type Definition page. The Taskgroup field on the TCD Setup page determines which profiles are sent to the TCD.)

Task Template ID

Select the task template associated with this task profile. If you are not interested in task-level reporting, you can select the value **PS Non Task** in this field.

If you need to associate a different task template with this task profile, you can change your selection. See the explanation of the **Change Task Template** button.

Change Task Template

Click this button only if you wish to change the task template associated with this task profile. All task data will be cleared from the **Allocation Detail** tabs. You can then select a different template from the **Task Template ID** field.



If you clear the task profile detail, you may invalidate any validated and paid time that has been reported using this task profile.

Allocation Type

Time and labor can be reported in quantities of hours, units, or amounts. You define how you want the reported quantity to be allocated to tasks. (Each task is represented by a row of task entities on the **Allocation Detail** tabs.)

Allocation by Quantity

Select this option if you want to enter a quantity (hours, units, or amount) for each task. The system will then convert the number you enter into a percentage, based on the total quantity you enter for all tasks. This option is similar to the **Allocation by Percentage** option, but rather than entering a percentage you enter a number that the system converts to a percentage.

For example, you might specify that 2 hours are to be reported to Task1 and 6 hours to Task 2. The system then converts the hours into percentages: 25% to Task1 and 75% to Task 2. When an employee reports time, such as 10 hours, the system will allocate 25% of the 10 hours to Task1 and 75% to Task 2.

- Allocation by Percentage

Select this option if you want to specify the percentage of hours, units or amounts the system should allocate to each reported task.
- Allocation Equally All Tasks

Select this option if you want the system to allocate hours, units, or amounts equally among all the tasks you report. The system determines the allocation when time is reported or created.

Allocation Detail



The template you select in the **Task Template ID** field determines the tabs and fields that appear in the **Allocation Detail** section of this page.

Insert a row for each task (that is, the combination of task-related entities) to which you want to allocate time. For example, the sample page specifies that 50 percent of a time reporter’s time will be allocated to the product, customer, and task identified on the first row, and 50 percent of the time will be reported to the combination of tasks reported on the second row.

- Allocation Amt (allocation amount)

The number you enter in this field depends on the option you selected in the **Allocation Type** group box.

If you selected the **Allocation by Quantity** option, enter the number the system should use to determine how to allocate the reported quantity (hours, units, or amount) to the task row you’re about to define. The system will convert the number into an allocation percentage.

For example, say you enter 2 on the first task row and 6 on the second task row. When time reporters enter their time, the system will automatically assign 2/8 (or 25%) of the reported time to the first set of tasks and 6/8 (or 75%) of the reported time to the second set of tasks.

If you selected the **Allocation by Percentage** option, enter the percentage of hours, units, or amounts that should be allocated to the task row you’re about to define.

If you selected the **Allocation Equally All Tasks** option, the **Allocation Amt** field doesn’t appear. The system will automatically distribute the reported quantity equally across all task rows.

Now, select the appropriate value for each of the task-related fields in the row. The system will dynamically adjust the prompt tables for some fields based on commitment accounting and the presence of other PeopleSoft applications.

The following table lists all tabs that can appear on the Task Profile page, along with all fields that can appear on each tab.

Tab Name	Fields
HR Fields	Company, Business Unit, Location Code, Department, Job Code, and Position Number.
TL Fields	Product, Customer, Task
Account Fields	Account Code, and related ChartFields if commitment accounting is used.
Projects Fields	PC Business Unit or Perf Meas Business Unit, Project/Grant, Activity ID, Resource Type, Resource Category, Resource Subcategory, depending on which Financials products are integrated with PeopleSoft Time and Labor.
User Fields	User Field 1, User Field 2, User Field 3, User Field 4, User Field 5.



For more information about the valid values that users can enter in these fields, see *Creating and Viewing Task Values* later in this section.

Defining Taskgroups

A taskgroup represents a group of time reporters with similar time and task reporting requirements. Taskgroups identify the default time reporting template, task template, and task profiles that are valid for members of the taskgroup. The task template you link to the taskgroup determines which task profiles you can attach.

Every time reporter must be associated with a valid taskgroup. You assign an individual to a Taskgroup using the *Create Time Reporter Data* page or the *Maintain Time Reporter Data* page.

Creating a Taskgroup for Non-task Reporting

To simplify the set up required for non-task reporting, PeopleSoft Time and Labor is delivered with a taskgroup, task template, and task profile, each named PSNONTASK.

If you're not interested in collecting task data, you can create a taskgroup and select PSNONTASK for both the task template and the default task profile. Then select the time reporting templates that identify the additional time elements you're interested in.

Modifying a Taskgroup

Once you save a taskgroup, you cannot change the commitment accounting option. You can change the time reporting templates, the task template ID, and inactivate task profiles associated with the taskgroup; however, these changes will trigger the Referential Integrity process when you run Time Administration.



For more information about referential integrity, see Referential Integrity.

Taskgroup Page

Usage	Use the Taskgroup page to create taskgroups.
Object Name	TL_TASKGROUP_TBL
Navigation	Define Business Rules, Define Time and Labor, Setup 2, Taskgroup.
Prerequisites	You must have created time reporting templates for elapsed and punch time. Unless you plan to use the nontask template, you must also have created the task template and profile.
Access Requirements	You must enter the name of the taskgroup.

Taskgroup

Taskgroup: KUTSKGRP3

View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Task Grp for Template and Prfl Short Description: Taskgrp 3

☐ Commitment Accounting

Clear Task Profile Detail

Task Template ID: KUTSKPRFT3 BU HR, Loc, Task

Time Reporting Template ID

*Elapsed: KUTRTP1 ETime Rptg Template/Profile

*Punch: KUTRTP2 PTime Rptg Template/Profile

Default Task Profile ID: KUTSKPRF3A Retail Task Profile 1

Valid Task Profiles - Only one can be checked as the default. View All First 1-2 of 2 Last

*Task Profile ID	Description	Status	Set As Default
KUTSKPRF3A	Retail Task Profile 1	Active	☒ + -
KUTSKPRF3B	Retail Task Profile 2	Active	☐ + -

Taskgroup page

The following elements are common to multiple pages in this application and are defined at the front of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Description, Short Description.**

Status

The status of the taskgroup appears in this field. If you change the status to **Inactive**, and the taskgroup is already assigned to time reporters, you will not be able to inactivate the effective-dated row.

Commitment Accounting

Select this check box if your organization uses commitment accounting for this taskgroup. Selecting this option restricts the task templates you can select from in the **Task Template ID** field.

Note. Once you save the taskgroup, you cannot change the commitment accounting option.

For more information about commitment accounting, see *Managing Commitment Accounting*.

Clear Task Profile Detail

Click this button if you've already attached task profiles to this taskgroup (in the **Valid Task Profiles** group box) and now wish to change the task template ID.

If you're in update or correction mode, the system will change the status of all task profiles listed in the **Task Profile ID** grid to **Inactive**. When you add new task profiles, the inactive profiles will be displayed after the active profiles when you access the page after saving the data.

The Referential Integrity process will be triggered if the system is in production (the Production Environment option on the TL Installation Page is selected) when you click the **Clear Task Profile Detail** button.

Task Template ID

Specify the task template you want to associate with this taskgroup. This is a required field. If you selected the **Commitment Accounting** check box on this page, the prompt table will list only those task templates defined for commitment accounting. The template you select will determine which task profiles you can attach to this taskgroup.

If you're not using task reporting, select **PSNONTASK**.

Default Task Profile ID

This field displays the name of the task profile that has been selected as the default for this taskgroup. (You select the default using the Task Profile ID grid.)

During the Time Administration process, the system will use this task profile if you have not selected a task profile ID on the time reporter's Create Time Reporter Data page or the Maintain Time Reporter Data page.

Time Reporting Template ID

Both **Elapsed** and **Punch** are required fields. Use these fields to specify which time reporting templates apply to members of this taskgroup.



For more information about time reporting templates, see *Creating Time Reporting Templates*.

Elapsed

Select the time reporting template for reporting elapsed time. This is a required field.

If a time reporting template for elapsed time doesn't apply to the time reporters who will be assigned to this taskgroup, select **PSELP_NONE** from the prompt table.

Punch

Select the time reporting template employees in this taskgroup are to use when reporting punch time. This is a required field.

Select **PSPCH_NONE** from the prompt table if a time reporting template for punched time doesn't apply to the time reporters who will be assigned to this taskgroup, for example, elapsed time reporters who will never need to enter punch time.

Valid Task Profiles

Use the grid to attach one or more task profiles to the taskgroup. You will also select the default task profile for members of the taskgroup.

Task Profile ID

Select the default task profile(s) you want to associate with this task-group. The prompt table lists only those task profiles created with the template you selected in the **Task Template ID** field.

During the Time Administration process, the system will use the default task profile if you have not selected a task profile ID on the time reporter's Create Time Reporter Data page or Maintain Time Reporter Data Page.

Description

The description of the taskgroup you selected in the **Task Profile ID** field automatically displays here.

Status

When you add a task profile ID to the grid, the status automatically defaults to **Active**. The status changes to **Inactive** if you change the task template. You cannot delete a task profile ID from the grid; however, you can change the status to **Inactive**.

Set As Default

You must select one task profile as the default for the taskgroup. This is the profile the system will use for any taskgroup members who don't have their own individual task profile defined on the Create Time Reporter Data page. Select this checkbox if you want this task profile to be the default profile.

CHAPTER 6

Defining Schedules

Scheduling is a mechanism that communicates workforce attendance expectations and facilitates the planning and compensation of time. In PeopleSoft Time and Labor, you can define 3 main types of schedules: punch, elapsed, and flex. Punch schedules include punch detail such as In, Out, Meal, Break, and Transfer. Elapsed schedules show the duration of time to be worked—for example, 8 hours on Monday. Flex schedules can be used when a time reporter has some flexibility as to when they begin and end their workday.

Creating schedules for time reporters is a two-part process: creating schedule calendars and assigning time reporters to schedule calendars.

In this section, we discuss how schedules are used and the details of creating schedule calendars in PeopleSoft Time and Labor. We discuss workday overrides, assigning schedule calendars to time reporters, and viewing schedule calendars in other sections.



For more information about assigning schedules, see [Assigning Schedules](#). For more information on overriding scheduled workdays and viewing schedules, see [Managing Schedules](#).

Understanding Work Schedules

Work scheduling in PeopleSoft Time and Labor provides several functions. The main goals of work scheduling are:

- To provide a facility to create, view, and manage a time reporter's schedule.
- To communicate work expectations to time reporters.
- To allow managers to manage work expectations.
- To allow estimation of labor cost based on scheduled time.
- To provide data that Time Administration can use to evaluate reported time.
- To provide scheduled information that Time Administration can use to create payable time for exception reporters
- To provide a facility to accept time reporters' schedules from external systems.
- To provide punch schedule information that can be sent to time collection devices.



Scheduling does not administer workforce scheduling. It does not create time and does not apply rules.

Understanding Schedule Calendars

A schedule calendar is a range of dates that has specified work and nonwork time.

<i>Date Under Report</i>	<i>Workday ID</i>	<i>Description</i>
17 December 2000	OFF	Off
18 December 2000	KUELPPDAY1	Elapsed 8 Hour Day
19 December 2000	KUELPPDAY1	Elapsed 8 Hour Day
20 December 2000	KUELPPDAY1	Elapsed 8 Hour Day
21 December 2000	KUELPPDAY1	Elapsed 8 Hour Day
22 December 2000	KUELPPDAY1	Elapsed 8 Hour Day
23 December 2000	OFF	Off

Schedule calendar setup is generally only done during implementation or when there are additions or changes to your existing schedules. Schedule calendars comprise four smaller components, and we have broken down the process of building a schedule calendar into its components.

To Create Schedules Calendars:

1. Create shifts.

Shifts are the most basic building blocks of work schedules and are used to create workdays. You can create elapsed, flex, and punch shifts.

2. Create workdays.

Workdays are daily work patterns built with shifts and are used to create work schedule templates.

3. Create schedule templates.

Schedule templates are sequential patterns of workdays and are used to build schedule definitions.

4. Create schedule definitions.

Schedule definitions allow the user to specify which template or combination of templates will be built into a schedule calendar.

5. Build schedule calendars.

Schedule calendars show the scheduled work hours over a period of time. The period varies depending on your organization. If your organization's work schedules are consistent over long periods, you can build schedule calendars covering long periods of time. If your organization's schedules change frequently, you'll probably want to build shorter schedule calendars.



For more information about assigning work schedules to time reporters, see [Assigning Schedules](#).

Understanding Shifts

A shift is the main building block for the workday and an aggregate for the set of Punch Types from which it is built. You create a shift by entering a Shift Type and the detail that you want in the shift. You can create three types of shifts.

Elapsed Shifts

You define a single elapsed punch entry for the shift. For example, you create an elapsed shift of eight hours. The eight hours is nonclock time. Elapsed shifts cannot exceed 24 hours.

Punch Shifts

You use punch shifts when you want to create shifts that define specific work times. Punch shifts are defined by an In punch and the first subsequent instance of an Out punch. There can be other punches, such as Break, Meal, or Transfer, between the In and Out punches. Punch times are associated with each punch. The duration of a punch can be entered, or you can let the system calculate the duration when the time for the next punch is entered.

Flex Shifts

PeopleSoft Time and Labor supports the concept of a flexible shift — a working arrangement that leaves some latitude for when the time reporter can begin and end the shift. You can enter core hours (required hours of work) according to your organization's business rules. You can also enter the weekly number of hours that the flexible shift requires. Flex shifts cannot exceed 24 hours.

Examples of Flex Shifts

<i>Type of Flex Shift</i>	<i>In Punch</i>	<i>Out Punch</i>	<i>Scheduled Hours</i>	<i>Flex Start</i>	<i>Flex End</i>	<i>Flex Weekly Hours</i>
1 Flex Band	06:00	18:00	8	09:00	15:00	40
2 Flex Range	06:00	19:00	8			40

<i>Type of Flex Shift</i>	<i>In Punch</i>	<i>Out Punch</i>	<i>Scheduled Hours</i>	<i>Flex Start</i>	<i>Flex End</i>	<i>Flex Weekly Hours</i>
3 Flex Core	00:00	23.59	8 (daily average)	09:00	15:00	40
4 Flex Core Plus	00:00	23.59	8	09:00	15:00	40

1. Time reporters may begin and end their workdays within a range of flexible hours in the morning and afternoon (begin any time between 06:00 and 09:00 and end any time between 15:00 and 18:00). Time reporters know that they must work 8 hours a day, 40 hours a week, and that they must work during the company-established core hours of 09:00-15:00. Time reporters can vary their begin and end times on a daily basis within the established flexible hours.
2. Time reporters may work any 8 hours during the day, within a range of flexible hours (that is, anytime between 06:00 and 19:00) and there is no company-defined core period. They must work 40 hours a week.
3. Time reporters may work any time during the week as long as they work 40 hours a week, and work during the company-established core hours (09:00-15:00). Time reporters can vary their begin and end times on a daily basis within the established flexible hours, and may vary the length of the workday as long as they meet the weekly 40-hour requirement.
4. Time reporters must work 40 hours a week, and work during the company-established core hours (09:00-15:00). Time reporters can vary their begin and end times on a daily basis within the established flexible hours, but may not vary the length of the 8-hour workday. This method effectively limits the time reporter to starting work between 07:00 and 09:00 and ending the workday between 15:00 and 17:00.

Shift Page

Usage	Use the Shift page to set up elapsed, flex, and punch shifts.
Object Name	SCH_SHIFT
Navigation	Define Business Rules, Define Time and Labor, Schedule, Shift
Prerequisites	None.
Access Requirements	Enter a Shift ID.

Shift

Shift ID: KUFLXSHF

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Flex Shift - 40 Hour Week

*Shift Type: Flex

Short Description: 40 Flex

Scheduled Work Hours: 12.00

Schedule Configuration Totals

Config 1:	0.00	Config 2:	0.00	Config 3:	0.00	Config 4:	0.00

Flex Shift Information

Core Begin: 9:00AM Core End: 3:00PM Weekly Hours: 40

Flex Start and End Detail

View All First 1-2 of 2 Last

Punch Type	Punch Time	Duration	Sch Cfg1	Sch Cfg2	Sch Cfg3	Sch Cfg4
1 In	6:00AM	12.00				
2 Out	6:00PM	0.00				

Shift page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Shift ID

The system displays the value you entered to access the page.

Effective Date

Enter an effective date for this shift. If you modify a previously-saved shift, there are a few limitations on the effective date you choose. You cannot change the effective date of the shift to a date earlier than the earliest effective date of all workdays that contain that shift. You cannot change the effective date to a date later than the start date of any schedule calendar in which it is used. You cannot change the effective date of a shift to a date later than the earliest effective date of all workgroups that have default schedule IDs that contain that shift.

Shift Type

Select the type of shift you are creating. Valid options include: ***Elapsed***, ***Flex***, ***Punch***.

If you change this field during Add mode, and punch detail has already been entered, then you will receive a warning that punch detail will be deleted if the type field is changed. The system deletes the punch details for all effective-dated rows. The Type field will be updated, for all effective-dated rows, to the new type (***Elapsed***, ***Flex***, or ***Punch***) you selected.

Once a shift is saved as one type, you cannot change it to another type of shift (for example, you can't change an elapsed shift to a punch shift).

If the value is ***Elapsed***, only the Elapsed punch types will display in the prompt. An elapsed shift can contain only one punch entry.

If the value is ***Punch***, In, Out, Break, Meal, and Transfer punch types can be entered. The Flex Shift Information group box does not appear on the page. Punch shifts require an In and Out punch to be saved.

If the value is ***Flex***, only In and Out punches can be entered. The Flex Shift Information group box appears and is available for entry. Flex shifts require an In and Out punch to be saved.

Scheduled Hours

This field displays the total amount of work time for the shift. For example, you may require a time reporter to punch in at 09:00 and punch out at 17:00 each workday, but the shift includes a one-hour lunch break for which the time reporter is not required to punch. The **Scheduled Hours** field will calculate 9 hours, but your organization is paying time reporters for 8 hours worked. In that case, the scheduled hours should be 8.

The **Scheduled Hours** field will be automatically calculated from the sum of the durations of punches in the grid—with the exception of Meal punches. You can also manually edit this number for Punch and Flex shifts. For an elapsed shift, the **Scheduled Hours** field will always equal the duration of the elapsed punch entry, and the field cannot be changed.

If you have modified a shift, the system will, at save time, check to see if that shift is used in any schedule calendars. If it is, then the schedule calendar will need to be refreshed. You can use the View Schedule Refresh page if you do not know if changes you are making will affect an existing schedule calendar.

If you make any changes that affect punch time or punch duration, the **Scheduled Hours** field will recalculate. You should review the **Scheduled Hours** field before you save your changes to be sure the field contains the correct data.

For flex shifts, it is especially important for the **Scheduled Hours** field to contain the number of hours for which time reporters are expected to work that shift. The reason is, for a flex shift, this field is used during Time Administration in determining the duration of time that is supposed to be worked for the shift.

Schedule Configuration Totals

PeopleSoft Global Payroll and Time and Labor share schedule setup pages and records. However, these fields are only used by the Global Payroll system.



For more information about Schedule Configuration fields in Global Payroll, see Using Schedules in your PeopleSoft Global Payroll PeopleBook.

Flex Shift Information

Core Start

Enter the begin time for the core period. The core period is the time during which time reporters are expected to be present at work, excluding meal and break time. This time must be later than the time of the In punch for the shift.

Core End

Enter the end time for the core period. The core period is the time during which time reporters are expected to be present at work, excluding meal and break time. This time must be earlier than the time of the Out punch for the shift.

Weekly Hours

Enter the weekly number of hours that this shift requires.

Detail Group Box

The label for this group box varies according to the Shift Type you have selected. There must be at least one line of punch detail for the shift to be saved.

Punch Type

In this PeopleBook, the terms *punch* and “*punch type*” will be used interchangeably. Note that you cannot have consecutive punches (except Transfer punches) of the same type. Valid **Punch Types** are:

In. An In punch marks the start of a work period—either at the beginning of a shift, or for a return to work after a break or meal. The first punch of a Punch or Flex shift must be an In punch.

Punch or Flex shift can not be saved if an In punch does not have a punch time and duration. The first punch of a Punch or Flex shift must be an In punch.

Transfer. Start of a work period that generally denotes a change in task and usually compensation-related characteristics.

Break. Start of a break period.

If you enter a Break punch, an In or a Transfer punch must immediately follow it for the system to save the page. For example, you can't have a Break punch followed by a Meal or Out punch.

Meal. Start of a meal period.

If you enter a Meal punch, an In punch or Transfer punch must immediately follow it for the system to save the page. For example, a Meal punch cannot be followed by a Break or Out punch.

Out. The last punch of a punch or flex shift must be an Out punch. An Out punch marks the start of unpaid, nonwork time. For punch periods with a punch type of **Out**, the **Duration** field is unavailable for entry. An Out punch can not be entered without an In punch preceding it somewhere in the shift (edit at save time). Punch or Flex shift can not be saved if an Out punch does not have a punch time. For a Punch and Flex shift, an Out punch must be entered for the page to save. No additional punches can be added to a shift after the Out punch row.

Elapsed. This punch type is only used if you create an Elapsed shift. The duration associated with this entry reflects the elapsed duration of the shift. An elapsed shift cannot be saved if an elapsed punch does not have a punch duration.

Punch Time

This field is used only for punch and flex shifts; all punches (except the Out punch) in punch and flex shifts must have a time and a duration. Enter the time this punch is scheduled to happen. The first punch time of a shift must always be entered. Subsequent punch times can be entered, or the system can calculate punch times based on the duration of the preceding punch.

If you change the time of a punch other than the last punch, the duration changes accordingly based on the new punch time and the subsequent punch time. In addition, if it is not the first punch, the duration of the previous punch changes based on the changed punch's new punch time.

If you enter a punch time, the system will calculate the duration based on the punch time of the previous row. If you enter a duration, the system will calculate this field for you on the next punch row.

Duration

This field displays the length of the punch in hours. It can be entered or calculated automatically by the system when the next punch time is entered. It is the duration of the punch period.

If you change the time of a punch, other than the last punch, the duration changes based on the new punch time and the subsequent punch time. In addition, if it is not the first punch, the duration of the previous punch changes based on the changed punch's new punch time.

If you delete a row, the duration of the punch above the deleted row changes to the difference between the punch time of that row and the punch time of the row that followed the deleted row.

The system displays a warning if a Punch or Flex shift is longer than 24 hours.

Sch Cfg 1-4 (schedule configuration)

These fields are for use with PeopleSoft Global Payroll. If you do not have this product installed, these fields will be unavailable for entry.



For more information about Schedule Configuration fields in Global Payroll, see Using Schedules in your PeopleSoft Global Payroll PeopleBook.

Understanding Workdays

A workday is the component of the schedule calendar that identifies which shift(s) will be worked on that day. As with shifts, workdays can be of three main types: Elapsed, Flex, or Punch. A workday will usually include one shift, but elapsed and punch workdays may contain more than one shift.

The reason for both the Shift and the Workday component being used to define a day of work is to allow for flexibility and efficiency setting up your schedules. For example, a school bus driver schedule might contain a combination of morning and afternoon shifts. Some people might only work mornings, some people might only work afternoons, and some people might work both mornings and afternoons. You can create three workdays that represent these different shift combinations using only the two shifts.

When you combine workdays to create Schedule templates, you will need a placeholder workday for time reporters' days off. PeopleSoft provides a workday that the system recognizes as an Offday (nonwork day). This system-delivered Off day can be viewed, but not edited.

Workday Page

Usage	Use the Workday page to define the shift(s) associated to the workday.
Object Name	SCH_WRKDAY
Navigation	Define Business Rules, Define Time and Labor, Schedule, Workday.
Prerequisites	You must define at least one shift.
Access Requirements	Enter a Workday ID.

Workday

Workday ID: KUFLXDAY1

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Flex Shift Day 6AM to 6PM Short Description: Flex 6-6

Start Time: 6:00AM Scheduled Hours: 12.00 *Workday Type: Flex

End Time: 6:00PM

Shift Information View All First 1 of 1 Last

*Shift ID	Description
1 KUFLXSHF	Flex Shift - 40 Hour Week

Workday page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Workday ID

The system displays the value you entered to access the page in this field.

Effective Date

Enter an effective date for this workday. If you modify a previously-saved workday, there are a few limitations on the effective date you choose. You cannot change the effective date of the workday to a date earlier than the earliest effective date of all shifts in the workday. You cannot change the effective date to a date later than the start date of any schedule calendar in which it is used. You cannot change the effective date of a workday to a date later than the earliest effective date of all workgroups that have default schedule IDs that contain that workday.

When a workday is modified, the system will check to see if that workday is used in any schedule calendars. If it is, then the schedule calendar will need to be refreshed. You can use the View Schedule Refresh Page if you do not know if changes you are making will affect an existing schedule calendar.

Start Time

This field displays the **Start Time** of the first shift for a **Punch** or **Flex** workday type. If the workday type is **Elapsed**, this field is blank.

End Time

This field displays the **End Time** of the last shift for a **Punch** or **Flex** workday type. If the workday type is **Elapsed**, this field is blank.

Scheduled Hours

This display-only field shows the number of work hours that are required for the workday. This value is summed from the **Schedule Hours** field for all shifts in the workday. A workday may be greater than 24 hours. For example, it may contain a 36-hour punch shift.

Workday Type

Select whether this workday will be **Elapsed**, **Flex**, or **Punch**. Elapsed and punch workdays can contain one or more shifts, but you may not combine different types of shifts in the same workday, and a shift cannot be used more than one time in the same workday.

If the value is **Elapsed**, only elapsed shifts can be used in the workday.

If the value is **Punch**, only punch shifts can be used in the workday.

If the value is ***Flex***, only flex shifts can be used in the workday.

If you change this field during Add mode and shift IDs have already been entered, you will receive a warning that shift IDs will be deleted if the type field is changed. Shift ID detail will be deleted for all effective dated rows, and the Type field will be updated, for all effective dated rows, to the same type as the effective dated row you are on when you make the change.

When a workday is saved as a particular type of workday (for example, elapsed), it can not be changed to another type (for example, punch).

End Time

This field displays the end time of the last shift for a punch or flex-type workday. If the workday consists of an elapsed shift, this field is blank.

Shift Information

This group box displays the shifts that comprise this workday. There must be at least one line of shift ID detail for the workday to be saved.

Shift ID

Enter the shifts you wish to add to this workday in this field.

Description

This field displays a description of the **Shift ID** you entered.

Creating Schedule Templates

A Schedule Template represents a pattern of work and nonwork days. This pattern is built by using the workdays you've created and a system-delivered Offday.

While the pattern is not yet associated to any dates, it helps to think of your organization's work patterns when creating the templates. For example, if some of your time reporters work 7 days a week, with Saturday and Sunday off, you can create a template that has one Offday, 5 workdays, and then one Offday.

You can create as many different templates as you need for your workday patterns. However, keep in mind that many patterns can be used for more than one schedule. For example, some of your time reporters work Monday through Friday 09:00-18:00, with Saturday and Sunday off; and some of your time reporters Tuesday through Saturday 09:00-18:00, with Sunday and Monday off. You can use the same seven-day template for both schedules: two Offdays and five workdays. Before you implement schedule templates, we recommend you thoroughly analyze the various workday patterns that your organization uses.



Because templates are not effective-dated, the impact of a change to a template is only seen when the schedule calendar is extended or rebuilt. You can disrupt the pattern of schedule calendars that use templates that have been changed, so plan carefully before making this change.

Template Page

Usage	Use the Template page to define a pattern of work and nonwork days.
Object Name	SCH_TMPLT
Navigation	Define Business Rules, Define Time and Labor, Schedule, Schedule Template.
Prerequisites	You must define at least one workday.
Access Requirements	Enter a Schedule Template ID.

Template

Schedule Template ID: KUSCHTPF1

*Description: Flex Schedule 8hr/Flex Sun-Sat Short Description: Flx 5-8 hr

*Template Type: Flex

Workday Information		View All	First	1-5 of 7	Last
*Workday ID	Description				
1 OFF	Off	+	-		
2 KUFLEXDAY1	Flex Shift Day 6AM to 6PM	+	-		
3 KUFLEXDAY1	Flex Shift Day 6AM to 6PM	+	-		
4 KUFLEXDAY1	Flex Shift Day 6AM to 6PM	+	-		
5 KUFLEXDAY1	Flex Shift Day 6AM to 6PM	+	-		

Template page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.



The template may not be modified if it is used in any schedule calendars that need to be refreshed. Link to view calendar refresh page.

Schedule Template ID

The system displays the value you entered to access the page in this field.

Template Type

Select whether this schedule template will be an elapsed, flex, or punch template.

If the value is ***Elapsed***, only Elapsed workdays and the offday can be used in the template.

If the value is ***Punch***, only Punch workdays and the offday can be used in the template.

If the value is ***Flex***, only Flex workdays and the offday can be used in the template.

You cannot combine different types of workdays in the same template. If you change the value in this field during Add mode, and the Workday Ids have already been entered, you will receive a warning that Workday Ids will be deleted if the type field is changed. If you choose to proceed, Workday ID detail will be deleted.

When a template is saved as a particular type of template (for example, elapsed), it can not be changed to another type (for example, punch).

Workday ID

Select the workdays that you want to add to this schedule template.

Description

This field displays a description of the **Workday ID** that you have added to this schedule template.

Understanding Offdays

It's important to understand how the system treats the Offday, a PeopleSoft-delivered workday with a Workday ID of **OFF**.

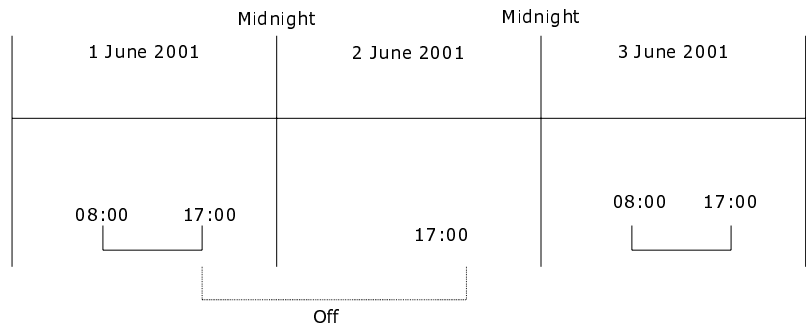
Building templates with Offdays

During the schedule calendar build process, the system recognizes the Offday as a 24-hour period of nonwork time. For an elapsed schedule, that means that for any date that is a scheduled Offday, the period between midnight and 23:59 is nonwork time.

Punch shifts are treated differently. The two examples below illustrate how three days of a template can be spread out over three or two calendar dates depending on the hours associated with the template workdays.

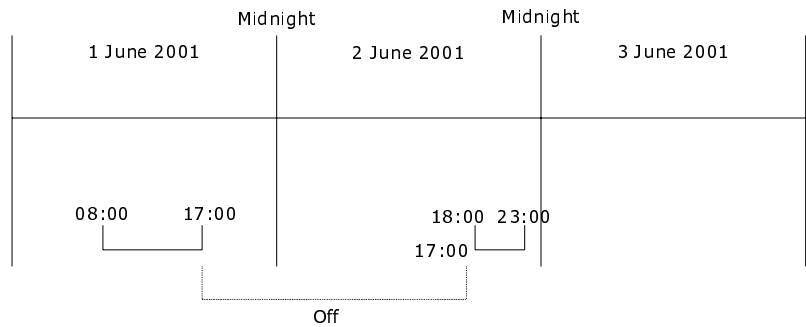
<i>Template Day</i>	<i>Workday ID</i>	<i>Hours of Shift associated with Workday</i>
Day One	DAYS	08:00-17:00
Day Two	OFF	(none)
Day Three	DAYS	08:00-17:00

If you include this template in a schedule definition and build a schedule calendar that begins 1 June 2001, the schedule calendar looks like this:



Template Day	Workday ID	Hours of Shift associated with Workday
Day One	DAYS	08:00-17:00
Day Two	OFF	(none)
Day Three	EVENINGS	18:00-23:00

If you include this template in a schedule definition and build a schedule calendar that begins 1 June 2001, the schedule calendar looks like this:



Saving templates with Offdays

If there are no Offdays in the template at save time, you will receive a warning that the template contains no Offdays. If there are only Offdays in the template at save time, you will receive a warning that the template contains only Offdays. There must be at least one row of workday ID detail for the template to be saved.

Creating Schedule Definitions

Schedule definitions are used to define one or more schedule templates that will be built out into a schedule calendar. Schedule definitions provide the flexibility to combine schedule templates into a pattern that can be used to produce a single schedule of work expectations over a period of time. This ability to pattern a schedule facilitates the generation of rotating work schedules.

For instance, the schedule definition could be composed of a template representing a 5-day, 08:00 to 17:00 workweek and a template representing a 5-day, 08:00 to 18:00 workweek. In addition, these templates can be set up to repeat a specified number of times before the next template is applied. We could specify that we will work four of the 5-day, 08:00 to 17:00 workweek templates followed by one of the 5-day, 08:00 to 18:00 workweek templates.

The reason for both the template and schedule component being used to define a schedule is to allow for flexibility and efficiency setting up your schedules. Using the example above, some of your time reporters might always work the 5-day, 08:00 to 17:00 workweek. Some of your time reporters might always work the 5-day, 08:00 to 18:00 workweek, and some of your time reporters might work a combination of the two workweeks, as mentioned above. You can create three schedules that represent these different template combinations using only the two templates.

Definitions are identified by a schedule ID. After you have created a schedule definition, you can assign a time reporter to the corresponding schedule ID. Keep in mind that you will not see schedule detail for that time reporter until the schedule calendar for that definition has been built.

Definition Page

Usage	Use the Schedule Definition page to identify one or more Schedule Templates that will ultimately be built into a schedule.
Object Name	SCH_DEFINITION
Navigation	Define Business Rules, Define Time and Labor, Schedule, Schedule Definition.
Prerequisites	You must define at least one schedule template.
Access Requirements	Enter a Schedule ID.

Definition

Schedule ID: KUSCHDFF1

*Description: Flex Schedule Definition Short Description: Flex Def

*Definition Type: Flex

Template Information View All First 1 of 1 Last

*Schedule Template ID	Description	Times Applied
KUSCHTPF1	Flex Schedule 8hr/Flex Sun-Sat	1

Definition page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.



The definition may not be modified if it is associated with any schedule calendars that need to be refreshed. [Link to view calendar refresh page.](#)

Schedule ID

The system displays the value you entered to access this page. It will carry through to become the Schedule ID for the schedule calendar created from this definition.

Definition Type

Select whether this will be an elapsed, flex, or punch Schedule Definition.

If you select is **Elapsed**, only Elapsed templates can be used in the definition.

If you select is **Punch**, only Punch templates can be used in the definition.

If you select is **Flex**, only Flex templates can be used in the definition.

You cannot combine different types of template in the same definition.

If this field is changed during Add mode, and **Schedule Template IDs** have already been entered, you will receive a warning that schedule template IDs will be deleted if the type field is changed. If you choose to proceed, Template ID detail will be deleted.

When a schedule definition is saved as a particular type (for example, elapsed), it cannot be changed to another type (for example, punch).

Template Information

Schedule Template ID

Enter the schedule template(s) you want to add to this schedule definition.

There must be at least one row of schedule template ID detail for the schedule definition page to be saved.

If a template ID is changed, the Times Applied value for that template changes to 1.

Description

The system displays a description of the **Schedule Template ID** you entered.

Times Applied

Enter the number of times you want the system to repeat this schedule template ID before it processes other schedule templates in the schedule definition. If there is only one template in the definition, this field can be left at one.

Building Schedule Calendars

You use this page to enter the information required to build Schedule Calendars from schedule definitions. The first time the calendar is built, you select the start and target end date for the calendar. When a calendar is extended, the system calculates the start date based on the previous build's end date. You can choose to accept that start date or override the start date. You still select the target end date. The Build Schedule Calendar process links schedule definitions to actual calendar dates and creates the specified schedule calendars for the range of dates you identify. You can build one or more schedule calendars at the same time.

Schedule calendars can also be extended—the calendar is built again using the system generated start date. They can be rebuilt—by overriding the system generated start date. And they can be refreshed—when one or more shifts or workdays used in the schedule calendar has been changed. The same page is used for all these scenarios, and the process is essentially the same. The different terminology is used to clarify what action you are taking with the schedule calendar.

Build Schedule Calendar Page

Usage	Use the Build Schedule Calendar page to tell the system to process work schedule components and build schedule calendars.
Object Name	SCH_RUNCTRL
Navigation	Define Business Rules, Define Time and Labor, Process, Build Schedule Calendar.
Prerequisites	You must create at least one schedule definition.
Access Requirements	Enter a Run Control ID.

Build Schedule Calendar

Run Control ID: SampleData1
[Report Manager](#)
[Process Monitor](#)

Schedule Calendars to Build/Refresh						First	1-2 of 2	Last
*Schedule ID	Description	Override Start Date	Start Date		Target End Date			
KUSCHDFF1	Flex Schedule Definition	☐	07/01/2001	Sunday	07/01/2002	Monday	+	-
KUSCHDFE2	Elapsed 10 Hour Day Definition	☐	07/01/2001	Sunday	08/01/2001	Monday	+	-

Build Schedule Calendar page

Run Control ID

The system displays the value you entered to access the page.

Schedule ID

Enter the **Schedule ID(s)** that you want to add to this **Run Control ID**. A **Schedule ID** may not be listed more than once on the page.

If the schedule calendar for the **Schedule ID** needs to be refreshed (meaning that a shift or workday in the schedule calendar has been changed), then all fields on the run control are automatically populated as necessary by the system and become unavailable for entry – except for target end date.

When a schedule calendar needs to be refreshed, the start date will be the effective date of the earliest change to shifts or workdays for that schedule, and the target end date must be equal to or greater than the last day or the existing calendar.

All shifts and workdays in the schedule ID(s) being built must have an effective date equal to or greater than the start date for their respective schedule IDs.

Description

A description of the **Schedule ID** you have chosen appears here.

Override Start Date

Select this check box to override the start date. This field is unavailable for entry if the schedule calendar has not yet been built. If you select this check box, the **Start Date** is available for entry.

Start Date

Enter the date the system should begin building the schedule calendar.

You must make sure your start date corresponds to the order that you have defined your templates, and placed the templates on your schedule definition. For example, if the first (or only) template in your schedule calendar assumes a Sunday start, then your schedule calendar build start date should be a Sunday.

If you override a schedule calendar start date without carefully planning the impact, you might disrupt the pattern of your schedule calendar or leave a gap in your schedule calendar.

[Day of Week]

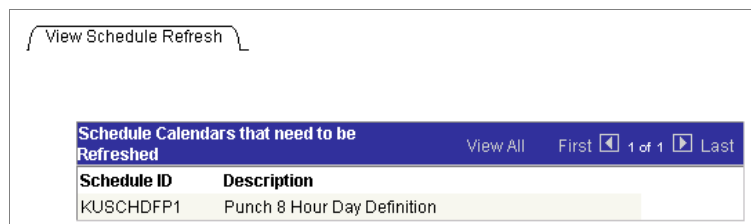
The system displays the day of the week corresponding to the date you entered.

Target End Date

Enter the minimum date to which you wish the schedule calendar to be built. Because the schedule definition has to be completed in its entirety, the schedule calendar may extend beyond the date you enter here. For example, you are building a schedule calendar from a definition that contains a seven-day template. You choose 31 December 2001 as the Target End Date of your schedule calendar. If 31 December 2001 is day five of your template, the schedule calendar will be built until 2 January 2002 to complete the last two days of the template.

View Schedule Refresh Page

Usage	Use the View Schedule Refresh page to view schedule calendars that need to be refreshed because a change was made to a shift or workday that the schedule calendar uses.
Object Name	SCH_CLND_REFRESH
Navigation	Define Business Rules, Define Time and Labor, Inquire, View Schedules to be Refreshed
Prerequisites	You must build at least one schedule calendar.
Access Requirements	None.



View Schedule Refresh page

This page contains a list of schedule calendars that need to be refreshed because a shift or workday that they use has been modified. The system displays a **Schedule ID** and **Description** for each schedule that needs to be refreshed.

View Schedule Calendar Page

Usage	Use the View Schedule Calendar page to view schedule calendars.
Object Name	SCH_CLND
Navigation	Define Business Rules, Define Time and Labor, Inquire, View Schedule Calendar

Prerequisites	You must build at least one schedule calendar.
Access Requirements	Enter a Schedule ID.

View Schedule Calendar

Schedule ID: K0WRKSCH **Description:** KUWRKSCH

Schedule Calendar			View All	First	1-8 of 336	Last
Date Under Report	Workday ID	Description				
02/08/1999	K0WRK1	hours a day				
03/08/1999	K0WRK1	hours a day				
04/08/1999	K0WRK1	hours a day				
05/08/1999	K0WRK1	hours a day				
06/08/1999	K0WRK1	hours a day				
07/08/1999	OFF	Off				
08/08/1999	OFF	Off				
09/08/1999	K0WRK1	hours a day				

View Schedule Calendar page

The system displays the schedule calendar and the dates for which it has been built. Specifically, it shows the workday associated to each day of the schedule.

Importing Third-party Schedules

PeopleSoft Time and Labor has the ability to accept schedules that have been created outside of the system, either from a third-party workforce scheduling system or another source. The SCH_ADHOC_DTL record serves as a repository for this information. These schedules can be viewed just like the schedules you can create within the Time and Labor system. They can also be processed in Time Administration if you set up rules that run against this scheduled information.

When importing third-party schedule information, populate the Sched Source field with a value of "I" so that the data is recognized as having come from an import. This will ensure the correct precedence processing. Imported schedule information takes precedence over schedule calendar information and online Workday Override information. Keep in mind that when you import schedule information, you will not be able to make online Workday Overrides on the dates for which you have imported information.



For more information about modifying records and tables, refer to your PeopleTools PeopleBook.

CHAPTER 7

Establishing Static and Dynamic Groups

Several online and batch processing functions in PeopleSoft Time and Labor rely on the use of groups. Groups are comprised of time reporters who meet a set of selection criteria that you define. When you run a process or access certain Time and Labor pages, the system determines the time reporters who will be processed or displayed, based on the group you select. For example, to access the Manage Exceptions by Group page, you select the group of time reporters you want to review.

This section describes how to create and update Dynamic and Static Groups in PeopleSoft Time and Labor. It also describes the security features you can use to restrict users from accessing sensitive data for members of all or selected groups.



For more information about group security features, see *Establishing Time and Labor Security*.

Understanding Static and Dynamic Groups

To establish a group, you define the set of criteria that time reporters must meet to be selected as members. For example, you can establish time reporter groups based on specific criteria such as company plus location.

Groups can be either static or dynamic, the main distinction being the method you use to update group membership. Membership in static groups does not change unless you add or remove members manually or change the selection criteria. Membership in dynamic groups is updated automatically when you run a batch process or use the system's refresh feature.

Time reporters can belong to several groups simultaneously, depending on your reporting needs. A time reporter may belong to a group consisting of people on the 4th floor and also belong to a group that consists of managers.

You can base your selection criteria on data contained in up to six records and their related fields. The records are: EMPLOYMENT, JOB, PERSONAL_DATA, SCH_ASSIGN, TL_EMPL_DATA, GP_PYGRP.

Security Features

PeopleSoft Time and Labor provides two security features that protect sensitive time reporter data.

- **Group Creation Security.**

With this feature you can prevent users who are associated with particular Row Security Permission Lists from creating groups based on records and fields that contain personal time reporter data.

- **Group Security.**

You can use Group Security to define which Row Security Permission Lists have access to the time reporters in each group. If you choose to use Group Security rather than Departmental Security for a particular permission list, everyone who uses PeopleSoft Time and Labor must belong to a group.



For more information about group security, see *Establishing Time and Labor Security*.

Taskgroup Borrowing

When you create a Static or Dynamic Group, you can choose a taskgroup for group members. The system will use the selected taskgroup when time is reported for group members through the Mass Time Reporting page. That is, the taskgroup assigned to the group takes precedence over a taskgroup assigned directly to a time reporter through the Maintain Time Reporter Data Page.

Time and Labor Functions that Use Groups

The online functions that use groups are Mass Time Reporting, Group Schedule Assignment, Approving Payable Time by Group, and Manage Exceptions by Group. The batch processes are Time Administration and Batch Approval. When generating a TimeCard report or Scheduled Hours report, you have the option of selecting the groups you want to include in the reports.



A basic knowledge of SQL may be helpful when defining your groups.

Creating Group Creation Security

When you create Dynamic and Static Groups, you define the criteria that time reporters must meet to be included in the group. PeopleSoft enables you to prevent users who are associated with particular row security permission lists from creating Dynamic and Static Groups that are based on sensitive data such as compensation rate or birthdate.



For more information about Row Security Permission Lists and system security, see *Establishing Time and Labor Security*.

Use the Group Creation Security page described in this section, to identify the records and fields that are available to users associated with a given row security permission list when creating and viewing groups. You can designate:

- Which of up to six records users can access to define the selection criteria for group membership.
- The fields within the six records users can access.

Records You Can Use to Create Groups

You can grant access to fields within the following six records (tables):

JOB

EMPLOYMENT

PERSONAL_DATA

SCH_ASSIGN

TL_EMPL_DATA*

GP_PYGRP**

* TL_EMPL_DATA is available only when the *Time and Labor* option is selected on the Installation Table - Products Page.

**GP_PYGRP is available only when if *Global Payroll Core* is selected on the Installation Table - Products Page.

Group Creation Security Page

Usage	Use the Group Creation Security page to prevent some row security classes from creating groups that are based on sensitive data.
Object Name	TL_GRP_FLD_SEC
Navigation	Define Business Rules, Define Time and Labor, Enroll, Group Creation Security
Prerequisites	None
Access Requirements	Enter the name of the Row Security Permission List.

Group Creation Security

Row Security Permission List: ALLPANLS Refresh Record Security Allow Full Access Remove All Access

Record View All First 1 of 6 Last

Record (Table) Name: EMPLOYMENT Allow Record Access Remove Record Access

Field Name	Accessible
APPOINT_END_DT	☒
BARG_UNIT	☒
BENEFIT_RCD_NBR	☒
BUSINESS_TITLE	☒
CMPNY_SENIORITY_DT	☒

Group Creation Security page

Row Security Permission List

The name of the Row Security Permission List you selected to access the page appears in this field.

Refresh Record Security

When you click the **Refresh Record Security** button, the system retrieves all records and fields that you have authority to access (as determined by the row security permission list assigned to you). It clears any access instructions that were previously defined for the row security permission list identified on this page.

This refresh feature is appropriate when:

You've added fields to records to the selected six records and now want to grant users access to the new fields when they create groups. For example, if you add fields to the PS_JOB table, then click this button, the system retrieves all fields in PS_JOB including the ones you added.

You install PeopleSoft Global Payroll after using this page to define security. When you click the button, Time and Labor retrieves the GP_PYGRP record.

Warning: If you click the **Refresh Record Security** button after you've granted access to certain records and fields, all access will be cleared for you to redefine.

Allow Full Access

Click the **Allow Full Access** button to enable users associated with the row security permission list to access all six records when creating and viewing groups. The system automatically selects all fields for all records you have authority to access, per the row security permission list assigned to you.

Remove All Access

Click the **Remove All Access** button to prevent all users associated with the row security permission list from using any of the six records and related fields as selection criteria when creating groups. Users are also prevented from viewing groups whose membership is based on these records. The system clears all check boxes for all six records.

Record**Record (Table) Name**

This field identifies the name of the record you're viewing. Records are displayed alphabetically by name.

Allow Record Access

If you want users to be able to access all fields in the record that is currently displayed, click the **Allow Record Access** button. The system automatically selects the **Accessible** check box to the right of each field name.

Remove Record Access

To prevent users from accessing all fields in the record that is currently displayed, click the **Remove Record Access** button. The system automatically clears the **Accessible** check box to the right of each field name.

Record Field Accessibility**Field Name**

The name of the field within the record.

Accessible

If selected, this check box indicates that users have the ability to include the field within the selection criteria they specify when creating groups.

Forming Static Groups

A Static Group is comprised of users who meet the selection criteria you define on the Selection Criteria page. Group membership remains static unless you manually remove members, or change the selection criteria.

Use the following pages to create and maintain static groups:

- Use the Selection Criteria Page to define the criteria for selecting group members. You can also select a taskgroup to be used for members during Mass Time Reporting.
- Use the Current Group Members Page to see a list of the time reporters in the group, remove all or selected group members, and to add comments about the group.
- Use the Security by Group Page to give users associated with selected Row Security Permission Lists the authority to view and update time for members of the group.

Selection Criteria Page

Usage	Use the Selection Criteria page to specify the criteria for selecting group members.
Object Name	TL_GROUP_S1
Navigation	Define Business Rules, Define Time and Labor, Enroll, Static Group
Prerequisites	You must set up Group Creation Security before you can create groups.
Access Requirements	Enter the Group ID. You can enter up to five alphanumeric characters for a new Group ID.

Selection Criteria Current Group Members Security by Group

Group ID: KUST2 *Description: Punch Type Employees Short Description: Punch

Taskgroup for Time Reporting: []

Group Parameters

Group 1: [] [] Group 2: [] [] Add to Group

Select Parameters View All First 1 of 1 Last

	*Record:	*Field Name	SetID	*Operator	Value
WHERE	TL_EMPL_DATA	TIME_RPTR_IND		=	P

SQL Object: FROM %SQL(TL_GRP_FROM_BASE)%SQL(TL_GRP_FROM_TL) WHERE %SQL(TL_GRP_BATCH_WHERE_BASE,%P(1)) AND %SQL(TL_GRP_BATCH_WHERE_TL,%P(1)) AND (TL_EMPL_DATA.TIME_RPTR_IND = 'P') Add to Group View SQL

Static Group - Selection Criteria page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description** and **Short Description**.

Group ID

The Group ID you entered to access the page appears in this field.

Taskgroup for Time Reporting

This field relates to the Mass Time Reporting feature. You can select a taskgroup that you want the system to apply when a user enters time for the members of this group through the Mass Time Reporting page. You might want to use this feature when a group of time reporters is working on a temporary project or assignment.

The taskgroup you enter in this field takes precedence over the taskgroup assigned to time reporters on the Maintain Time Reporter Data page.

For more information about taskgroups, see PeopleSoft 8 Time and Labor, “Defining Task Reporting Requirements”.

Group Parameters

If you are forming a new group, and want it to include the same members as an existing static group, or the same members plus or minus the members of another static group, you can complete the **Group Parameters** fields.

Group 1

In the **Group 1** field, select the name of the group whose members you want to include in the new group.

In the field to the right, indicate if you want to include or exclude members of a second group:

Select **Minus** if you want to exclude all members of the group you select in the Group 2 field.

Select **Plus** if you want to include all members of the group you select in the Group 2 field.

Group 2

If you selected **Minus** or **Plus** in the field to the left, select the name of the group whose members you want to include or exclude.

Add to Group

Click the **Add to Group** button to add members to the group based on the criteria you’ve selected.

Note. You must select the **Add to Group** button to add time reporters to the group.

Select Parameters

Use the fields in the **Select Parameters** group box to define the selection criteria for adding members to the group. For example, you may want to add only those people who work in a particular location or job. The system will use the criteria you enter to generate the WHERE clause of a SQL select statement. Your WHERE clause can contain up to 254 characters.

If you also complete the **Group 1** or **Group 2** field, the system will include all time reporters who meet the Group Parameters plus all time reporters who meet the criteria you define in the following fields.

(	Select a bracket type. The system processes the statement in brackets before it processes the rest of the SQL WHERE clause. You can select a single open bracket (or up to five open brackets (((((.
Record	Select a record name. Only records with access given in the Group Creation Security Page are available. This is the record from which you can choose any field.
Field Name	Select a field name. Only fields with access given in the Group Creation Security pages will be available. This field can now be defined with any valid value as part of your selection criteria.
SetID	If you select Job in the Record field and one of the fields listed below in the Field Name field, select the SetID with which the field is associated. In all other cases, the SetID field is unavailable for entry.
	SAL_ADMIN_PLAN GRADE STEP SALARY_MATRIX_CD DEPTID JOBCODE LOCATION
Operator	If you want to perform a mathematical operation, select the appropriate symbol. Valid entries are: <, <=, <>, =, >, >=, and LIKE . If you select LIKE , you can type in a partial value in the Value field. For example, the letter S .

Value

Select a value for the field you chose for the **Field Name**.

If you selected **LIKE** as the operator, do not enter quotation marks or the % sign in the **Value** field.

This field is case sensitive. Enter the value exactly as is was defined when added to the database. As an example, if you want to enter an employee ID that is set up as KC0001 in your database, type KC0001, not kc0001, Kc0001, and so on.

If entering a date, be sure to enter the proper date format for your environment. For example, to select January 1, 2000 as the date, enter 00-JAN-01 if using Oracle; enter 2000-01-01 if using SQL Server.

For more information about valid values, see Prompts With Dependencies.

)

Select the closing bracket type.

(unlabeled)

If you want to add another parameter to your selection criteria (the WHERE clause), select **AND** or **OR**.

SQL Object

The system displays the WHERE clause in this field when you click the **Add to Group** button.

Add to Group

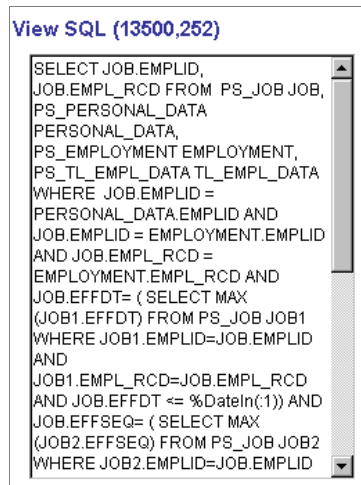
Click **Add to Group** to add the time reporters that fit the criteria created to this Static Group. This button will also update the MetaSQL in the **SQL Object** field.

Note. You must select the **Add to Group** button to add time reporters to the group.

View SQL

Click the **View SQL** link to view the SQL code generated by the WHERE clause.

View SQL Page



View SQL page

Prompts With Dependencies

In some cases, the Value field on the Selection Criteria page does not provide a list of valid values to choose from. This is because the field name you selected, by itself, does not give the system enough information to retrieve the appropriate set of values. That is, the values for the selected field are dependent on the values for one or more other fields.

The following table lists the fields whose values are dependent on other fields. While you can type a value for any of these fields in the **Value** field, the system may not return the results you expect, if the value you enter is not unique.

Record	Field Name	Table	Dependencies
EMPLOYMENT	TIME_RPT_LOC	TIMERPT_LOC_TBL	COMPANY
JOB	ACTION_REASON	ACTN_REASON_TBL	ACTION
	CONTRACT_NUMBER	CNT_ACTIVE_VW	EMPL_ID
	HOLIDAY_SCHEDULE	HOLIDAY_VW	REG_REGION
	PAYGROUP	PAYGROUP_TBL	COMPANY
	EMPL_TYPE	PAYGRP_EMPLTYPE	COMPANY, EMPL_TYPE, PAYGROUP
	GRADE	SAL_GRADE_TBL	SAL_ADMIN_PLAN, SETID

	STEP	SAL_STEP_TBL	GRADE, SAL_ADMIN_PLAN, SETID
	REG_REGION	REG_STANDARD _VW	OPRCLASS
	REVIEW_RATING	REVIEW_RATING_TBL	RATING_MODEL
PERSONAL_DATA	BIRTHSTATE	BIRTHSTATE_VW	BIRTHCOUNTRY
TL_EMPL_DATA	TASK_PROFILE_ID	TL_TASKGRP_PROF	TASKGROUP

Viewing the Members of a Static Group

Current Group Members Page

Usage	Use the Current Group Members page to view a listing of the members of the static group you select.
Object Name	TL_GROUP_S2
Navigation	Define Business Rules, Define Time and Labor, Enroll, Static Group, Current Group Members
Prerequisites	None
Access Requirements	Enter a Group ID.



You can also access the Current Group Members page from the Administer Workforce menu (Capture Time and Labor, Inquire, View Time Reporters in Group).

Selection Criteria Current Group Members **Security by Group**

Group ID: KUST2 Punch Type Employees

Sort By: EmplID Remove All Remove

EmplID	Empl Rcd Nbr	Name	Delete Row
KC0003	0	Rogers,Cynthia A	☐
KC0004	0	Reid,Charles M	☐
KU0010	0	Santos,Antonio	☐
KU0020	0	Stevenson,Christelle	☐
KU0035	0	Fung,James	☐

Comments:

Static Group – Current Group Members page

Group ID

The Group ID you entered to access this page appears in the **Group ID** field. A description of the group appears to the right.

Sort By:

Select **EmplID** to sort members by Employee ID or select **Name** to sort members alphabetically by last name.

Delete Row

If you want to remove a member from the group, select the **Delete Row** checkbox to the right of the member's name. This field works in conjunction with the **Remove** button.

Remove All

To remove all time reporters from the group, click the **Remove All** button.

Remove

To remove selected time reporters from the group, select the **Delete Row** check box to the right of the time reporter's name and click the **Remove** button.

Setting Up Security by Static Group

Row Security Permission Lists define a set of data permissions for users associated with a particular Permission List. Use the Security by Group page to give users who are assigned to specific Row Security Permission Lists the ability to view and edit time reporting data for the time reporters who belong to a particular group.



You use the same Security by Group page to define security access to a Static Group and a Dynamic Group.

Static Group - Security by Group Page

Usage	Use the Security by Group page to specify which Row Security Permission Lists can view and edit time reporting data for this group of time reporters.
Object Name	TL_GRP_SECURITY
Navigation	Define Business Rules, Define Time and Labor, Enroll, Static Group, Security by Group
Prerequisites	Group Creation Security. Create Static Group.
Access Requirements	Enter a Group ID.

Static Group - Security by Group page

Group ID:

The Group ID you entered to access this page appears in the Group ID field. A description of the group appears to the right.

Row Security Permission List

Select the Row Security Permission List you want to associate with this group. In doing so, you are granting users who are associated with the Row Security Permission List the authorization to edit and view data for the time reporters in the group.

Class Descr (Class Description)

The description of the Row Security Permission List you selected appears in this field.

Understanding Dynamic Groups

Membership in a Dynamic Group is updated automatically by the Time Administration process and by other processes that use Dynamic Groups. When the batch process is initiated, all the time reporters who satisfy the Dynamic Group's attributes at the time of execution are assembled for processing. The batch programs use the actual date the program is run in order to determine which time reporters satisfy the group selection criteria.

You can also use the refresh feature to update group membership—automatically removing time reporters who no longer meet the selection criteria and adding those who do. This enables these groups to be used in many online processes.

Use the following pages to create and maintain Dynamic Groups:

- Use the Selection Criteria Page to define the criteria for selecting group members. You can also select a taskgroup to be used for members during Mass Time Reporting.
- Use the Potential Group Members Page to preview the list of time reporters who will be included in the group, should you refresh the group or run the Time Administration process.
- Use the Security by Group Page to give users associated with selected Row Security Permission Lists the authority to view and update time for members of the group.
- Use the Current Group Members Page to see the list of time reporters in the group after the refresh process is complete.

Selection Criteria Page

Usage	Use the Selection Criteria page to establish the criteria that you want to use to select members of the group.
Object Name	TL_GROUP_D1
Navigation	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group
Prerequisites	You must set up Group Creation Security before you can create groups.
Access Requirements	Enter the Group ID. You can enter up to five alphanumeric characters for a new Group ID.

Selection Criteria Potential Group Members Security by Group Current Group Members

Group ID: KUDY2 *Description: USA Employee Dyn Group Short Description: USA TR's

Last Refresh: 05/06/2000 14:24 Taskgroup for Time Reporting: [Dropdown]

Select Parameters View All First 1 of 1 Last

	*Record	*Field Name	SetID	*Operator	Value
WHERE	TL_EMPL_DATA	WORKGROUP		LIKE	KU

SQL Object:

```
FROM %SQL(TL_GRP_FROM_BASE)%SQL(TL_GRP_FROM_TL) WHERE %SQL
(TL_GRP_BATCH_WHERE_BASE,%P(1)) AND %SQL(TL_GRP_BATCH_WHERE_TL,%P(1)) AND (
TL_EMPL_DATA.WORKGROUP LIKE 'KU%')
```

Create SQL View SQL

Selection Criteria page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description** and **Short Description**.

Group ID

The Group ID you entered to access this page appears in this field.

Last Refresh

The date and time the group membership was last refreshed.

Taskgroup for Time Reporting

This field relates to the Mass Time Reporting feature. You can select a taskgroup that you want the system to apply when a user enters time for the members of this group through the Mass Time Reporting page. You might want to use this feature when a group of time reporters is working on a temporary project or assignment.

The taskgroup you enter in this field takes precedence over the taskgroup assigned to time reporters on the Maintain Time Reporter Data page.

For more information about taskgroups, see PeopleSoft 8 Time and Labor, “Defining Task Reporting Requirements”.

Select Parameters

Use the fields in the **Select Parameters** group box to define the selection criteria for adding members to the group. For example, you may want to add only those people who work in a particular location or job. The system will use the criteria you enter to generate the WHERE clause of the SQL select statement. A WHERE clause can contain up to 254 characters.

(	Select a bracket type. The system processes the statement in brackets before it processes the rest of the SQL WHERE clause. You can select a single open bracket (or up to five open brackets ((((((.
Record	Select a record name. Only records with access given in the Group Creation Security Page are available. This is the record from which you can choose any field.
Field Name	Select a field name. Only fields with access given in the Group Creation Security pages will be available. This field can now be defined with any valid value as part of your selection criteria.
SetID	If you select Job in the Record field and one of the fields listed below in the Field Name field, select the SetID with which the field is associated. In all other cases, the SetID field is unavailable for entry.
	SAL_ADMIN_PLAN GRADE STEP SALARY_MATRIX_CD DEPTID JOBCODE LOCATION
Operator	If you want to perform a mathematical operation, select the appropriate symbol. Valid entries are: <, <=, <>, =, >, >=, and LIKE . If you select LIKE , you can type in a partial value in the Value field. For example, the letter S.
Value	Select a value for the field you chose for the Field Name. If you selected LIKE as the operator, do not enter quotation marks or the % sign in the Value field. This field is case sensitive. Enter the value exactly as is was defined when added to the database. As an example, if you want to enter an employee ID that is set up as KC0001 in your database, type KC0001, not kc0001, Kc0001, and so on. If entering a date, be sure to enter the proper date format for your environment. For example, to select January 1, 2000 as the date, enter 00-JAN-01 if using Oracle; enter 2000-01-01 if using SQL Server. For more information about valid values, see Prompts With Dependencies.

)	Select the closing bracket type.
(unlabeled)	If you want to add another parameter to your selection criteria (the WHERE clause), select AND or OR .
SQL Object	The system displays the WHERE clause in this field when you click the Create SQL button.
Create SQL	Click the Create SQL button to update the SQL code that will be used to select group members.
View SQL	Click the View SQL link to access the View SQL Page where you can see the SQL code generated by the WHERE clause.

Viewing Members of Dynamic Groups

You can preview the list of time reporters that Time and Labor will select for your Dynamic Group based on the criteria you've established on the Selection Criteria page. This feature helps ensure that you've defined the correct selection criteria. When you're ready to create and save the group, you can use the Current Group Members Page or the Selection Criteria Page.

Potential Group Members Page

Usage	Use the Potential Group Members page to see the list of time reporters who currently meet the selection criteria for a Dynamic Group.
Object Name	TL_GROUP_D2
Navigation	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group
Prerequisites	You must enter your selection criteria for the group on the Selection Criteria page.
Access Requirements	Enter the Group ID.

Selection Criteria Potential Group Members **Security by Group** Current Group Members

Group ID: KUDY2 USA Employee Dyn Group [View Current Group](#)

Sort By: EmplID

Group Member View		
EmplID	Empl Rcd Nbr	Name
0		

Find | View All First 1 of 1 Last

Comments:

Potential Group Members page

Group ID

The Group ID you entered to access this page appears in this field. The group's description appears to the right.

Sort By

Select **EmplID** to sort time reporters by Employee ID or select **Name** to sort alphabetically by last name.

View Current Group

Click the **View Current Group** button to view a list of all time reporter who meet the selection criteria as of this moment.

Setting Up Security by Dynamic Group

Row Security Permission Lists define a set of data permissions for users associated with a particular Permission List. Use the Security by Group page to give users who are assigned to specific Row Security Permission Lists the ability to view and edit time reporting data for the time reporters who belong to a Dynamic Group.

Security by Group Page

The Security by Group Page you use for Dynamic Groups is the same as the page you use for Static Groups.



For more information about the Security by Group page for Static Groups, see Static Group - Security by Group Page

Viewing Refreshed Dynamic Groups

The refresh feature enables you to update membership in a Dynamic Group. When you invoke the process, the system removes time reporters who no longer meet the group selection criteria and adds time reporters who do.

We recommend that you use the Refresh Dynamic Group feature just before accessing any online page in which you access time reporters. This ensures that you see an up-to-date listing of the group members when the page is displayed.

It's not necessary to refresh dynamic groups before batch processing. Time and Labor automatically refreshes group membership before processing time.

Current Group Members Page

Usage	Use the Current Group Members page to see the current members of a Dynamic Group. You can also use this page to refresh group membership.
Object Name	TL_GROUP_LIST
Navigation	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group
Prerequisites	You must enter your selection criteria for the group on the Selection Criteria page.
Access Requirements	Enter the Group ID.



You can also access the Current Group Members page from the Administer Workforce menu (Capture Time and Labor, Inquire, View Time Reporters in Group).

Selection Criteria

Potential Group Members

Security by Group

Current Group Members

Group ID:

KUDY2

USA Employee Dyn Group

Refresh Dynamic Group Now

As Of Date:

05/06/2000

Last Refresh Date/Time:

05/06/00 14:24

Sort By:

Group Members			Find View All	First	1-7 of 7	Last
EmplID	Empl Rcd Nbr	Name				
KU0002	0	Baran,Charles				
KU0010	0	Santos,Antonio				
KU0015	0	Espinosa,Carmichael				
KU0020	0	Stevenson,Christelle				
KU0035	0	Fung,James				
KU0042	0	Johnson,Danny				
KU0042	1	Johnson,Danny				

Current Group Members page

Group ID	The Group ID you entered to access this page appears in this field. A description of the group appears to the right.
As Of Date	If you entered an As Of Date on the Refresh Dynamic Groups Page when you last refreshed this group, the date you entered appears in this field.
Last Refresh Date/Time	This field displays the date that group membership was last refreshed.
Sort By	Select EmplID to sort group members by Employee ID or select Name to sort members alphabetically by last name.
Refresh Dynamic Group Now	Click this button to refresh your Dynamic Group instantly. The system refreshes the membership of your Dynamic Group and lists the group members.

Group Members

EmplID (employee ID)	The employee ID of the group member appears in this field.
Empl Rcd Nbr (employee record number)	This field displays the employee record number for the group member.
Name	The group member's name appears on this field.

Refreshing Dynamic Groups

You can refresh more than one group at the same time using the Refresh Dynamic Groups page. The refresh process uses today's date or the *as of* date you specify to determine which time reporters meet your group selection criteria.

Refresh Dynamic Groups Page

Usage	Use the Refresh Dynamic Groups page to update membership in a Dynamic Group.
Object Name	TL_GROUP_LIST
Navigation	Define Business Rules, Define Time and Labor, Process, Refresh Dynamic Group(s)
Prerequisites	None.
Access Requirements	Enter up to 30 alphanumeric characters, without spaces, for the Run Control ID.

Refresh Dynamic Groups

Run Control ID: BENADMIN [Report Manager](#) [Process Monitor](#) [Run](#)

☒ Use Current Date

☐ Refresh All Dynamic Groups

Groups to be Refreshed		Find View All	First 1-2 of 2 Last
Group ID: KUDY1	Canadian Workgroup Dyn Group	+ -	
Group ID: KUDY2	USA Employee Dyn Group	+ -	

Refresh Dynamic Groups page

Run Control ID

The Run Control ID you entered to access this page appears in this field. A description of the group appears to the right.

Use Current Date

Select the **Use Current Date** check box if you want the system to select all time reporters who meet the selection criteria today.

As of Date

The **As of Date** field only appears if you clear the **Use Current Date** check box. Enter the date for which you want the group refreshed.

You can enter a previous date if you need to refresh the population of a group or groups for a prior date.

Refresh All Dynamic Groups

To refresh all Dynamic Groups, select this check box.

Group ID

Enter the Group ID of the group you want to refresh.

Process Monitor

Click to access the Process List page, where you can view the status of submitted process requests.

Run

Click to access the Process Scheduler request page, where you can specify where a process or job runs and the process output format.

CHAPTER 8

Setting Up Time Reporters

We use the term *time reporter* to refer to both employees and non-employees whose time is reported or generated through PeopleSoft Time and Labor. You must set up, or enroll, each person for whom time will be reported or created, as a time reporter. Employees and non-employees do not automatically participate in the Time and Labor system simply because they've been hired or added into the Human Resources database.

During the enrollment process, you assign a workgroup and a taskgroup to the time reporter as well as other values that will determine how the time reporter enters time and how Time and Labor processes the time. The enrollment process may also determine the comp time plans that are assigned to a time reporter.

This section describes how to set up time reporters and how to update their enrollment data if it changes. It also describes how to assign default schedules to time reporters if you want to override the schedule assigned to the time reporter's workgroup.

Time Reporter Data and Referential Integrity

When you make a change to one area of PeopleSoft Time and Labor, Referential Integrity makes sure the changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or employee related data that could invalidate related objects or values in the system.

The following tables describe Referential Integrity actions when certain changes, inactivations, or deletions are made to time reporter data.



For more information about the Referential Integrity feature within PeopleSoft Time and Labor see Understanding Referential Integrity in this PeopleBook.

Prevention of Inactivation or Deletion of Effective-Dated Rows

The following table lists the pages and conditions when the system will not allow the inactivation or deletion of effective-dated rows.

Page	Condition
Maintain Time Reporter Data	You cannot inactivate an effective-dated row if time has been reported for a date that is the same or after the effective date. You can insert a new effective-dated row to inactivate a time reporter when there is no reported or payable time on or after that date.
	If the Default from Workgroup check box for the Comp Plan Assignment is not selected on the TL Installation page, you cannot delete an effective-dated row that invalidates a comp plan association on the Comp Plan Enrollment page. You must inactivate the comp time plan associated with the time reporter on the Comp Plan Enrollment page before you delete the row on the Maintain Time Reporter Data page. Note. If the Default from Workgroup check box is selected, you can delete a row on the Maintain Time Reporter Data page.

Execute Edit Error Checking

You cannot change the minimum effective date on a page to be less than the minimum effective date of a field that acts as a prompt on this page.

Page	Prompts on Page
Create/Maintain Time Reporter Data	Workgroup Taskgroup TCD Group Rule Element 1 Rule Element 2 Rule Element 3 Rule Element 4 Rule Element 5

Nested Effective Dates

You cannot change the effective date of the prompt table to be greater than the effective date of the target table.

Prompt Table	Target Table
Workgroup	Create/Maintain TR Data

Prompt Table	Target Table
TCD Group	Create/Maintain TR Data
Taskgroup	Create/Maintain TR Data
Rule Element 1	Create/Maintain TR Data
Rule Element 2	Create/Maintain TR Data
Rule Element 3	Create/Maintain TR Data
Rule Element 4	Create/Maintain TR Data
Rule Element 5	Create/Maintain TR Data



For more information about how the system reacts on nested effective-dated tables, see Understanding Nested Effective-Dated Tables in this book.

Enrolling Time Reporters

When you enroll a time reporter in PeopleSoft Time and Labor you specify how the person will report time and how the system will process that time. You must assign:

- A taskgroup that identifies the default time reporting templates, task template, and task profiles to use for time reporting.
- A workgroup that defines the type of reporting the person will do (exception or positive), the rule program, TRC program, default time period, schedules, rounding rules, and the daybreaker options applicable to the time reporter. The workgroup can also determine the comp plan assigned to the time reporter, if any.

In addition, you can:

- Assign a TCD group that identifies the time collection devices the time reporter can use and a restriction profile ID that identifies which TCD punches are acceptable.
- Select time reporter's time zone if it is different from the base time zone defined in your PeopleTools Options page.
- Enter up to five rule elements you want to associate with the time reporter.
- Select a specific task profile, time reporting templates, and time period ID that will take precedence over those associated with the time reporter's default taskgroup and workgroup.

Navigating to the Time Reporter Data Pages

You enroll time reporters in PeopleSoft Time and Labor using the Create Time Reporter Data page. You can open this page through Time and Labor or by selecting the Time Reporter Data

link on several pages that you can access through the Administer Workforce (GBL and USF) menu and the Recruit Workforce (GBL and USF) menu in PeopleSoft Human Resources.

You update time reporter data through the Maintain Time Reporter Data page. You can access this page through PeopleSoft Time and Labor as well as by selecting the Time Reporter Data link on several pages that are accessible through the Administer Workforce (GBL) menu and the Administer Workforce (USF) menu of PeopleSoft Human Resources.

Create Time Reporter Data page

Usage	Use the Create Time Reporter Data page to enroll a time reporter into PeopleSoft Time and Labor.
Object Name	TL_EMPL_DATA1
Navigation	Define Business Rules, Define Time and Labor, Enroll, Create Time Reporter Data
Prerequisites	Employees must be hired into PeopleSoft Human Resources and have an Employee Status of <i>Active</i> status. Non-employees must be added to PeopleSoft Human Resources and have a Job Status of <i>Active</i> .
Access Requirements	Enter the employee ID.



You can also navigate to the Create Time Reporter Data page by clicking the Time Reporter Data link on various pages accessible through the Administer Workforce menu for PeopleSoft Human Resources. The Time Reporter Data link only appears if you've selected Time and Labor on the General Installation Table.

Create Time Reporter Data

Jones, Susan ID: K0G001 Empl Rcd#: 0

Person Type: Personnel Status: Employee **Badge Detail** Payable Time Start Date: []

View All First 1 of 1 Last

*Effective Date: 08/25/2000 *Time Reporter Status: Active ☒ Send Time to Payroll

Time Reporter Type Time Reporting Template

☒ Elapsed

☐ Punch

Commitment Accounting Flags

☐ For Taskgroup

☐ For Department

Time Period ID:

*Workgroup:

*Taskgroup:

Task Profile ID:

TCD Group:

Restriction Profile ID:

Rule Element 1:

Rule Element 2:

Rule Element 3:

Rule Element 4:

Rule Element 5:

Time Zone: PST Pacific Time, Tijuana

Create Time Reporter Data page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Person Type**, **Personnel Status**.



Use the Maintain Time Reporter Data page to make changes to data entered on the Create Time Reporter Data page.

Badge Detail

Click the **Badge Detail** button to access the Badge Detail page where you can view the badge information for this time reporter. You enter badge information in Administer Workforce (GBL) as a part of the hiring or data maintenance process for your time reporters.

The badge information is important for punch time reporters, who need this information to report time to the time collection device (TCD).

Payable Time Start Date

Enter the date on which you want the system to start creating payable time for the time reporter. This date is especially important for time reporters in a workgroup defined for exception time reporting who will have payable time created from schedules.

The date you enter in this field updates the Earliest Change Date (EARLIEST_CHGDT) field on the time reporter's TL_TR_STATUS record. This is the date the Time Administration process uses to determine the initial creation of payable time.

For example, if you enroll your time reporter with an effective date of 01/01/2000, but you don't want the system to start creating payable time for the time reporter until 02/01/2000, enter **02/01/2000** in this field.

If you do not select a date, the first time you run the Time Administration process for the exception time reporter, it will create payable time as of the Time and Labor enrollment date (the first effective date for the time reporter).

The Payable Start Date cannot be earlier than the date the time reporter is enrolled in Time and Labor.

For more information about how Time Administration uses the TL_TR_STATUS to determine the period of interest for rules processing, see Understanding Time Reporter Status.

Note. The **Payable Start Date** field does not appear on the Maintain Time Reporter Data page because it is only used once. If you change the first Effective Date for the time reporter on the Maintain Time Reporter Data page, the Referential Integrity process triggers the update of the Earliest Change Date.

Effective Date

The effective date must be the same as or after the hire date or, for non-employees, the add date.

Time Reporting Status

When you enroll a time reporter, the **Time Reporting Status** defaults to **active**. This signifies that time can be reported and generated for the time reporter.

Send Time to Payroll

Select this check box if you are integrating PeopleSoft Time and Labor with your payroll system and want this time reporter's payable time to be sent to payroll.

If you do not select this check box, the Time Administration process sets the status of the time reporter's payable time to *Needs Approval* when it converts the reported time to payable time. When the payable time is approved, the status is updated to *Closed* and published to PeopleSoft Projects, if you have this product installed.

For more information about payable time and payable time statuses, see PeopleSoft 8 Time and Labor, "Understanding Payable Time".

Time Reporter Type

Time Reporter Type identifies how the time reporter will be entering time. It does not affect the assignment of schedules. For example, you can assign a punch schedule to a time reporter designated as an elapsed time reporter.

Elapsed

Select the **Elapsed** option if your time reporter will be reporting time in durations of hours or partial hours.

Punch

Select the **Punch** option if your time reporter will be reporting start and stop times in precise instances of date and time, recorded in seconds, minutes, hours, day, month, year, and time zone.

Time Reporting Template

Time reporting templates define the types of information time reporters supply when reporting time. If you leave the **Elapsed** and **Punch** fields blank, the system will use the time reporting templates assigned to the time reporter's taskgroup.



For more information about time reporting templates, see Reporting Time.

Elapsed

Select the elapsed time reporting template you want to use for this time reporter, if different from the one assigned to the time reporter's taskgroup.

Punch

Select the punch time reporting template you want to use for this time reporter, if different from the one assigned to the time reporter's taskgroup.

Commitment Accounting Flags

The Commitment Accounting Flags only apply when you integrate our commitment accounting functionality with task reporting. These fields are not available for entry.

For Taskgroup is selected automatically if the taskgroup you chose for the time reporter in the **Taskgroup** field is defined for commitment accounting.

For Department is selected automatically if the time reporter's department is defined for commitment accounting in PeopleSoft Human Resources. (The Use Actuals Distribution check box is selected on the Department table, accessed through PeopleSoft Human Resources.) When this check box is selected, you must assign the task reporter a taskgroup that is also defined for commitment accounting.

Both flags must be automatically selected or unselected before you can save the Create Time Reporter Data page.

For more information about commitment accounting, see Managing Commitment Accounting.

Time Period ID

The system uses time periods to differentiate between reported time that falls within the current period and time that falls within a prior period.

Select a Time Period ID only if you want the system to use a different time period ID than that assigned to the time reporter's workgroup.

For more information about time periods, see PeopleSoft 8 Time and Labor, "Setting Up Your Basic Tables".

Workgroup

Select a workgroup for the time reporter. Workgroup is a required field. It identifies the default TRC program, rule program, holiday schedule, time reporting period, and other information the system will use when processing reported time for this person.

If you change the workgroup, and the Assign Workgroup Schedule field is set to “Yes” on the time reporter’s Assign Schedules page, the system deletes any workday overrides for the time reporter that are of a different type than the assigned schedule (that is, elapsed versus punch).

If you change the workgroup when the Default from Workgroup check box for Comp Plan Assignment is selected on the TL Installation page, comp plan enrollment is updated when there is a change in comp plan. The comp plan that is no longer in use is inactivated and the new comp plan becomes active as of the effective-dated change of the workgroup on the Maintain Time Reporter Data page.

For more information about workgroups, see PeopleSoft 8 Time and Labor, “Establishing Workgroups”.

Taskgroup

Taskgroup is a required field. It identifies the default task template, task profile, and time reporting templates the system will use when collecting and processing reported time for this time reporter.

If the time reporter’s department is set up for Commitment Accounting (the **For Department** check box under **Commitment Accounting Flags** is selected), you must assign a taskgroup that’s defined for commitment accounting. When you do so, the system will automatically select the **For Taskgroup** check box. Both the **For Department** and **For Taskgroup** check boxes must be selected or unselected before you can save the page.

You can choose **PSNONTASK** if this time reporter will never be reporting task information. (The system can still collect all the time reporting elements such as country, state, locality, badge ID, and time zone.)

For more information about taskgroups, see PeopleSoft 8 Time and Labor, “Defining Task Reporting Requirements”.

Task Profile ID

Select a task profile ID only if you want the system to use a different default task profile ID than that assigned to the time reporter's taskgroup. Task profiles define the tasks to which a person's reported time will be allocated automatically if task information is not reported.

For more information about task profiles, see PeopleSoft 8 Time and Labor, "Defining Task Reporting Requirements".

TCD Group (time collection device group)

If the time reporter will be using a time collection device, such as a time clock or badge scanner to report time, select the appropriate TCD group. The TCD group identifies the time collection devices the time reporter is authorized to use.

Note. When you set up a TCD, you associate it with one or more taskgroups. We recommend that you select one of the taskgroups that is associated with the TCD as the time reporter's default taskgroup in the **Taskgroup** field. If your default taskgroup is not associated with a TCD in your TCD Group, you will receive a warning message upon saving the page. In addition, all reported task information will be associated with a borrowed taskgroup.

For more information about TCD groups, see Using Time Collection Devices.

Restriction Profile ID

This field applies only if the time reporter will be using a time clock device to report time. A restriction profile identifies the when to allow or disallow punches to occur in conjunction with the time reporter's schedule.

Select a Restriction Profile ID in this field only if you want to apply a different restriction profile than that assigned to the time reporter's TCD Group.

For more information about restriction profile IDs, see Using Time Collection Devices.

Rule Elements 1-5

You can assign up to five rule elements to a time reporter. When you run the Time Administration process, the system retrieves the values of the time reporter's rule elements and makes the values available for rules processing. This feature enables you to tailor your rules to a specific population of time reporters.

For more information about Rule Elements, see *Defining and Using Rule Elements within Rules*.

Time Zone

Select the time zone in which the time reporter will be entering time.

This field defaults to the base time zone you defined through PeopleTools Utilities.

For more information about the base time zone, see *Creating Time Zone Offsets*.

Badge Detail Page

Usage	Use the Badge Detail page to display badge information entered for the time reporter.
Object Name	TL_BADGE_SEC
Navigation	Define Business Rules, Define Time and Labor, Enroll, Create Time Reporter Data
Prerequisites	Enter the badge information using the Badge page in PeopleSoft Human Resources.
Access Requirements	Select the Badge Detail button on the Create Time Reporter Data page or the Maintain Time Reporter Data page.

Badge Detail				
View All First 1 of 1 Last				
Effective Date	Status	Badge Type	Badge Number	Comment

Badge Detail page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status.**



For more information about the fields on this page, see the Badge page.

Maintaining Time Reporter Data

Use the Maintain Time Reporter page to update information you entered on the Create Time Reporter Data page and to view a time reporter's group memberships. Although the Maintain Time Reporter Data page looks very similar to the Create Time Reporter Data page, you can only use it to update time reporter data that is maintained in PeopleSoft Time and Labor.

Changes that Trigger Referential Integrity

Updates to the Workgroup, Taskgroup, Task Profile ID, and Rule Element fields on the Maintain Time Reporter Data page trigger a referential integrity check when you run the Time Administration process in Time and Labor. Referential integrity triggers the Time Validation process that re-evaluates reported or payable time that may be invalidated by a change in Workgroup, Taskgroup or Task Profile ID. Exceptions are generated for invalid time.



For more information about referential integrity, see Referential Integrity.

Maintain Time Reporter Data Page

Usage	Use the Maintain Time Reporter Data page to update enrollment information for time reporters who have already been set up in PeopleSoft Time and Labor.
Object Name	TL_EMPL_DATA1
Navigation	Define Business Rules, Define Time and Labor, Enroll, Maintain Time Reporter Data
Prerequisites	Enroll your time reporters in the system using the Create Time Reporter Data page.
Access Requirements	Enter the employee ID.



You can also navigate to the Maintain Time Reporter Data page by clicking the Time Reporter Data link on various pages accessible through the Administer Workforce menu for PeopleSoft Human Resources.

Maintain Time Reporter Data page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Person Type**, **Personnel Status**.

Group Membership

Click the **Group Membership** button to access the Group Membership page where you can see the list of groups in which the time reporter is currently enrolled.



Most of the elements on the Maintain Time Reporter Data page are the same as those on the Create Time Reporter Data page. Descriptions are provided below for those elements that trigger referential integrity when updated, and elements that when changed, produce other consequences you should be aware of. For more information about the elements not documented below see the Create Time Reporter Data page.

Time Reporter Status

If you change a time reporter's status to **inactive**, time can no longer be reported or generated for the time reporter.

Updating a person's status in PeopleSoft Human Resources has no effect on the Time Reporter Status. So, if a time reporter is terminated, you can update the employee status through PeopleSoft Human Resources, and then process any reported time for which the time reporter has not yet been paid. After the time is processed, you can change the time reporter status to **inactive** on the Maintain Time Reporter Data page to prevent additional time from being reported or generated.

Send Time to Payroll

Changing the Send Time to Payroll option after payable time has been created for this time reporter may impact the payable time. See Impact of Changing the Send Time to Payroll option for details.

Workgroup

If you change the Workgroup value assigned to the time reporter, the next time you run the Time Administration process, the system will verify that the TRCs associated with the reported time belong to the TRC program associated with the new workgroup for the date reported.

Note. We recommend that you limit changes in workgroup assignments to the start date of a new period. Changes made in the middle of a period may cause weekly or bi-weekly rules associated with a time reporter to produce unpredictable results. For more information, see Understanding Workgroup Transfers.

Taskgroup

If you change the Taskgroup value assigned to the time reporter, the next time you run the Time Administration process, Referential Integrity will validate that any task entities reported on or after the change date are associated with the new taskgroup.

For more information about referential integrity, see Understanding Referential Integrity.

Task Profile ID

If you change the Task Profile ID value assigned to the time reporter, the next time you run the Time Administration process, the system will verify that the task profile, if any, reported through the weekly elapsed time page is associated with the employee's default task group as of the date reported.

For more information about referential integrity, see Understanding Referential Integrity.

TCD Group (time collection device group)

If you change the TCD Group assigned to the time reporter, use the TCD interface to resend the employee information setup data to the time collection devices.

For more information about communicating changes to your time collection devices, see Sending Time to Your Time Collection Device.

Restriction Profile

If you change the Restriction Profile ID assigned to the time reporter, use the TCD interface to resend the employee information setup data to the time collection devices.

For more information about communicating changes to your time collection devices, see Sending Time to Your Time Collection Device.

Group Membership Page

Usage	Use the Group Membership page to view the list of groups the time reporter is assigned to.
Object Name	TL_GRP_MEMBERSHIP
Navigation	Define Business Rules, Define Time and Labor, Enroll, Maintain Time Reporter Data
Prerequisites	The time reporter must be assigned to one or more static or dynamic groups.
Access Requirements	Select the Group Membership button on the Maintain Time Reporter page.

Group Membership		
View All First 1-2 of 2 Last		
Group ID	Description	Group Type
KUDY2	USA Employee Dyn Group	Dynamic
KUST2	Punch Type Employees	Static

Group Membership page

Group ID

The Group ID appears in this field.

Group Description

The description you assigned to the group appears in this field.

Group Type

The Group Type can be either Dynamic or Static:

Dynamic groups are comprised of time reporters who met the group selection criteria as of the time you last refreshed the dynamic group. Time reporters are automatically added and removed from dynamic groups as their ability to match the selection criteria changes.

For more information about refreshing group membership, see Refreshing Dynamic Groups.

Static groups are comprised of time reporters who met a specific set of criteria at the time the group was established. Time reporters stay assigned to a static group unless you remove them.



For more information about groups, see Establishing Static and Dynamic Groups.

Impact of Changing the Send Time to Payroll Option

The following table shows how a change to the Send Time to Payroll option on the Maintain Time Reporter Data page can impact a time reporter's payable time.



For more information about payable status, see Understanding Payable Time.

<i>Payable Status of Payable Time</i>	<i>Impact of Changing Send to Payroll flag to NO</i>	<i>Impact of Changing Send to Payroll flag to YES</i>
Estimated – Ready for Payroll	Time remains in Estimated status. It will not be picked up by a payroll system, set to Closed status, or published to PeopleSoft Projects.	Not applicable.
Needs Approval	Payable status is set to Closed during online or batch approval.	Payable status must be set to Approved to be picked up by a payroll system.
Approved – Goes to Payroll	The payable status will not be set to Closed nor will the time be published to PeopleSoft Projects. You can use SQL to change the payable status, and then manually publish the time to Projects.	Not applicable.
Closed	Time remains in Closed status. If the time has been Closed as a result of being paid but not labor-distributed, and you want to adjust it, you must make a manual adjustment within your payroll system. Be sure to make a record-only adjustment in Time and Labor to keep the data in both applications synchronized.	The Time Administration process will not set the payable status to Approved, therefore the time cannot be sent to a payroll system. You can use SQL to change the status to Approved. If you change the status to Approved, and the time is picked up by a payroll system, it can be published to PeopleSoft Projects a second time. If there's a difference between the Estimated Gross Amount that was originally published and the newly calculated amount, only the difference will be published.
Rejected by Payroll	Time Administration will not set the payable status to Closed, therefore, another payroll system can retrieve the time. You can use SQL to set the status to Closed.	Not applicable.

<i>Payable Status of Payable Time</i>	<i>Impact of Changing Send to Payroll flag to NO</i>	<i>Impact of Changing Send to Payroll flag to YES</i>
Sent to Payroll Taken – Used by Payroll Paid – Labor Distributed Paid – Labor Diluted	Time has already been accepted by your payroll system; however, if payment has not yet been issued and you need to make adjustments, you can enter adjustments through your payroll system. Be sure to make record-only adjustments in Time and Labor to keep the date in both applications synchronized.	Not applicable.

Assigning and Viewing Compensation Plans

We offer you two ways to enroll time reporters into the Compensatory Time (Comp Time) Off Plans you define in Time and Labor. You choose which method you want to use through the TL Installation page (time and labor installation page):

- If you select the Default from Workgroup check box (under Comp Plan Assignment) Time and Labor will automatically assign time reporters to the comp time plan linked to their workgroup, if any. The comp time plan and its status will be displayed on the Comp Plan Enrollment page described in this section; however you will not be able to make any changes on this page. If you change the comp time plan associated with the time reporter's workgroup or assign the time reporter to a different workgroup (through the Maintain Time Reporter Data page), resulting in a new comp plan assignment, the system automatically updates the Comp Plan Enrollment page.
- If you don't select the Default from Workgroup check box on the TL Installation page, you can assign a time reporter directly to one or more comp time plans using the Comp Plan Enrollment page.

You can view all active and inactive comp time plans for a time reporter through the View Comp Plans pages.



Enrollment records are not affected if you clear the Default from Workgroup check box after comp time plans are assigned to time reporters. However, you will gain the ability to edit the Comp Plan Enrollment page.



For more information about creating compensation plans, see Establishing Comp Time Plans. For more information about assigning compensation plans to workgroups, see Establishing Workgroups and the TL Installation page.

Comp Plan Enrollment Page

Usage	If you've set up the system so that time reporters are automatically assigned to the comp time plans attached to their workgroup, use this page to view the comp time plans that have the same effective date. If you've set up the system so that you can directly assign time reporters to comp time plans, you can use this page to enroll a time reporter in one or more comp time plans.
Object Name	TL_EMPL_COMP
Navigation	Define Business Rules, Define Time and Labor, Enroll, Comp Plan Enrollment
Prerequisites	None.
Access Requirements	Enter the employee ID.

Comp Plan Enrollment

Stevenson, Christelle ID: KU0020 Empl Rcd#: 0

View All First 1 of 1 Last

*Effective Date: 09/25/1982

Valid Compensatory Time Off Plans for Time Reporter View All First 1 of 1 Last

*Compensatory Time Off Plan:	*Status:
KUCTOP2 Allow Negative Hours/Expire	Active ☒

Comp Plan Entry Defaults from Time Reporter's Workgroup and cannot be changed or added

Comp Plan Enrollment page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Empl Rcd#, Status.**

Effective Date

This field displays the date on which the time reporter's enrollment in the plan becomes effective.

If the comp time plan was assigned to the time reporter's workgroup, the date the workgroup was assigned to the time reporter appears in this field. (If you subsequently change the plan assigned to the workgroup, or change the time reporter's workgroup assignment, the field reflects the date on which the new plan takes effect.)

Compensatory Time Off Plan

Select the comp time plan you want to assign to the time reporter. You can assign more than one comp time plan to a time reporter as long as the plans do not share any of the same comp time TRCs (time reporting codes that have the Effect on Comp/Leave option set to CT Earned or CT Taken.)

This field is unavailable for entry if the Default from Workgroup check box is selected on TL Installation page. In this case, you'll see the following message at the bottom of the page: "Comp Plan Entry Defaults from Time Reporter's Workgroup and cannot be changed or added".

Status

The **Status** field indicates if the time reporter is currently associated with the comp time plan. Valid values are **active** and **inactive**.

The system automatically changes the status to **inactive** if the comp time plan associated with the task reporter's workgroup changes to inactive. It also changes the status to **inactive** if the time reporter's workgroup assignment is changed on the Maintain Time Reporter Data page, and the change results in a different comp plan for the time reporter.

View Comp Plans Page

Usage	Use the View Comp Plans page to view the history of comp time plan assignments for a specific time reporter. The page lists the plans in which the time reporter is currently active as well as those in which the time reporter is no longer active.
Object Name	TL_TR_COMP_PLAN_VW
Navigation	Define Business Rules, Define Time and Labor, Inquire, View Time Reporter Comp Plans
Prerequisites	The time reporter must be enrolled in a comp time plan.
Access Requirements	Enter the employee ID.

View Comp Plans

Stevenson,Christelle ID: KU0020 Empl Rcd#: 0

Compensatory Time Off Plan Participation			
Effective Date	Status	Compensatory Time Off Plan	Description
09/25/1982	Active	KUCTOP2	Allow Negative Hours/Expire

View Comp Plans page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID**, **Empl Rcd#**, **Effective Date**, **Status**, **Description**.

Compensatory Time Off Plan The name of the comp time plan appears in this field.



If a time reporter switches comp time plans, the change will be represented by three rows of data on the View Comp Plans page: one row for the original plan with a status of **active**; a second row for the original plan with a status of **inactive**, and a third row for the new plan with a status of **active**.

Assigning Schedules

All time reporters will have a schedule assignment that is either the workgroup default schedule or an explicit schedule other than the workgroup default. When a person is hired in HR, they are given a schedule assignment to use the workgroup default schedule. If you want a time reporter to have a schedule assignment other than the workgroup default, there are two ways to change the assignment. One is on an individual basis on the Assign Schedules page. The other is to use the Group Schedule Assignment process.

On the Assign Schedules page, you can assign a schedule to a single time reporter. You can also designate that the system should use the time reporter's workgroup default schedule. Depending on your access security, you can view a time reporter's schedule history on this page.

Using the Group Schedule Assignment process, you can assign a schedule to one or more time reporters simultaneously. You can assign the schedule to a Static or Dynamic group that you have already created, or you can create a selection of individual time reporters (who may not have anything else in common) solely for the purpose of assigning them the same schedule. After running the Group Schedule Assignment process, you can view the time reporters' new schedule assignment using the Assign Schedules page.

When you assign a schedule to a time reporter, the system deletes any Workday Overrides for that time reporter that are of a different type than the schedule assignment (for example, Elapsed instead of Punch), and have a date greater than or equal to the new assignment. This is to retain the data integrity of the work schedule.



For more information about Workday Overrides, see [Override Scheduled Workday Page](#).

New schedule assignment will also trigger the Referential Integrity process to have any reported or payable time with a date greater than or equal to the date of the new assignment be reevaluated by Time Administration. This is to make corrections where necessary due to payable time being created from scheduled time and where rules are run against scheduled time.

Time reporters with multiple jobs can have a schedule assignment for each job. However, you should check the assignments to be sure you are not scheduling the time reporter to any concurrent hours. The system will not check for overlapping hours from multiple schedule assignments.



For more information about how to set up schedules and how schedules are used in PeopleSoft Time and Labor, see [Defining Schedules in Time and Labor](#).



For the assignment of schedules, the Workforce_Sync Message must be active on the PERSON_DATA Message Channel , which is delivered with our Application Messaging feature.



For more information about Message and Message Channel setup, see [Using the EIP Catalog](#).

Assigning Individual Schedules

You use this page to assign a long-term schedule to a time reporter. If you wish to change a schedule for only one day, use the [Override Scheduled Workday Page](#).

Assign Schedules Page

Usage	Use this page to assign a time reporter's long-term schedule.
Object Name	SCH_ASSIGN
Navigation	Define Business Rules, Define Time and Labor, Enroll, Assign Work Schedule

Prerequisites	You must create at least one schedule definition.
Access Requirements	Enter an EmplID and an Empl Rcd Nbr.

Assign Schedules

Christelle Stevenson ID: KU0020

Job Title: Sr Payroll Clerk

Schedule Assignments

Details

Effective Date	Assign Workgroup Schedule	Schedule	Description
09/25/1982	No	KUSCHDFP1	Punch 8 Hour Day Definition

Assign Schedules page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**.

The system displays the time reporter's name, ID, and job title.

Assign Workgroup Schedule

Select whether the system should use the time reporter's workgroup default schedule.

Schedule

If you select "Yes" in the Assign Workgroup Schedule field, the system displays the time reporter's default Workgroup Schedule. If you select "No," you will enter the schedule that you wish to use.

Description

The system displays the description of the Workgroup Schedule or other **Schedule** you selected entered.

Assigning Group Schedules

When you want to assign a schedule to a group of time reporters, most of who are in a Static or Dynamic Group, you can select that Group ID and then selectively exclude any time reporters to whom the schedule assignment does not apply. You can also selectively include time reporters who share the same schedule assignment, but do not belong to the Group ID you've entered. If the group of time reporters who will share this schedule assignment have nothing in common, you can select them individually by EmplID.

Group Schedule Assignment Page

Usage	Use this page to assign a long-term schedule to a group of time reporters.
Object Name	SCH_GRP_ASSIGN
Navigation	Define Business Rules, Define Time and Labor, Process, Group Schedule Assignment
Prerequisites	You must create at least one schedule definition.
Access Requirements	Enter a Run Control ID.

Group Schedule Assignment

Run Control ID: BENADMIN [Report Manager](#) [Process Monitor](#) [Run](#)

Effective Date: 08/25/2000 [BT](#) *Schedule ID: KUSCHDFE2 [Q](#) Elapsed 10 Hour Day Definition

Time Reporter to Include				View All	First	1-3 of 3	Last
EmplID:	Empl Rcd#:	Group ID:	*Include/Exclude Indicator:				
KC0001 Q	0 Q	KUDY2 Q	Include				+ -
KC0003 Q	0 Q		Exclude				+ -

Group Schedule Assignment page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Effective Date.**

Schedule ID

Select the schedule that you are assigning. The system displays a description of the schedule you select.

EmplID

Select the time reporter that you want to include in or exclude from this Group Schedule Assignment.

Empl Rcd#

Select the appropriate value for this time reporter.

Group ID

Select the group for which you would like to assign a schedule.

CHAPTER 9

Establishing Time and Labor Security

As a time manager, you'll want to protect confidential information stored in your Time and Labor system. To do this, you can set up PeopleSoft system-level security as well as Time and Labor security for time reporters. This section covers procedures for using the security features in Time and Labor to limit access to time reporting data.

Understanding Row Security Permission Lists

Permission lists, which are created through PeopleTools and assigned to User Profiles, define users' sign-on times, page access, PeopleTools access, and a variety of other authorizations. Row Security Permission Lists define the set of data permissions you can grant to users who are associated with a particular Permission List.

In PeopleSoft Time and Labor you can define row security permission lists that give the users affiliated with selected permission lists the authority to:

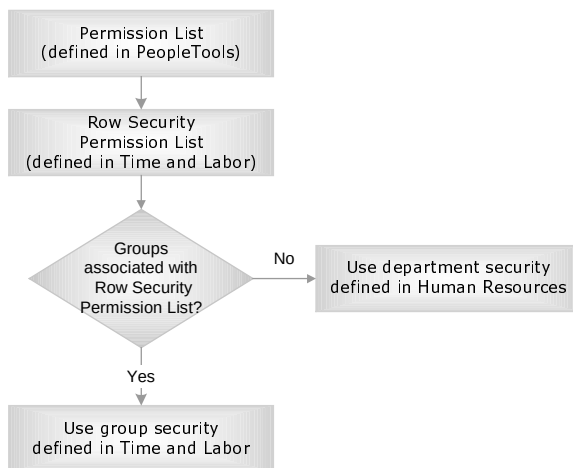
- Enter or update time reported in a previous period.
- Make use of the Time and Labor system date if the system is not in production mode.
- View and enter data for time reporters who belong to the static or dynamic groups you specify. We refer to this feature as *group security*.

Group Security versus Department Security

When you open the Mass Time page, the TL Launch Pad, or any other page through which you can enter or display time, the list of time reporters you can access depends on whether you are using the group security feature in Time and Labor or department security.

- If you're using group security, you can view and enter time for all members of the groups that are assigned to your row security permission list. Groups can be assigned to your row security permission list through the Row Security Permission List page described in this section or the Security by Group page described in Establishing Static and Dynamic Groups.
- If you're not using group security, that is, you do not have groups assigned to your row security permission list, Time and Labor defaults to the department security. Department security is derived by determining the Department ID you are assigned to and then seeing who you have access to in your department and the departments that are set up as children on your Departmental Security Tree.

The diagram below shows when Time and Labor uses group security or department security to determine which time reporters a user can access.



Row security permission lists determine the use of group security or department security



For more information about Permission Lists and how you assign them to users, see Permission Lists in the *PeopleTools PeopleBook*. For more information about Department Security, see Administering Security in the *PeopleSoft Application Fundamentals PeopleBook*.

Before You Begin

If you plan to use group security, you can create groups before or after you define the other data permissions for row security permission list. If you choose to create groups first, follow the procedures in the Establishing Static and Dynamic Groups section of this book.

Setting Up Row Security Permission Lists

You can use the Row Security Permission List page to define whether users who are associated with a selected Permission List can:

- Make prior period adjustments.
- Make prior period adjustments within a limited timeframe only.
- See an informational message for prior period adjustments upon accessing the Weekly Elapsed Time or Weekly Punch Time reporting pages for a prior period.
- Edit data for certain groups of time reporters.

Row Security Permission List Page

Usage	Use the Row Security Permission List page to create security that limits a user's ability to access and update data for groups of time reporters.
Object Name	TL_SECURITY_PNL
Navigation	Define Business Rules, Define Time and Labor, Enroll, TL Permission List Security
Prerequisites	You must create groups and establish group security. See Establishing Static and Dynamic Groups for more information.
Access Requirements	Enter the name of the Row Security Permission List. (The Row Security Permission inherits the name of the Permission List.)

Row Security Permission List
Row Security Users

Row Security Permission List: ALLPANLS

Security by Permission List

Edit Prior Period Time ☒ Days Grace Allowed: Prior Period Message Display ☐

Use TL System Date ☒ TL System Date: 06/01/2000

Group Access
Find | View All First 1-4 of 4 Last

*Group ID:		Group Type Indicator:	
KUDY1 Q	Canadian Workgroup Dyn Group	Dynamic	+ -
KUDY2 Q	USA Employee Dyn Group	Dynamic	+ -
KUST1 Q	Elapsed Time Reporters	Static	+ -
KUST2 Q	Punch Type Employees	Static	+ -

Row Security Permission List page

Row Security Permission List

The Row Security Permission List that you selected to access this page appears here.

Security by Permission List

Edit Prior Period Time

Select **Edit Prior Period Time** if you want to give users associated with this permission list the ability to enter prior period adjustments for members of the groups you identify in the **Group Access** box below.

A prior period adjustment is an entry of time that's made for a date that falls before the begin date of the time reporter's current period.

To determine if the time you're entering represents a prior period adjustment, the system refers to the time reporter's time period ID. It then looks at the Time Period Calendar to determine the begin and end date of the time period in which the adjustment falls. Any entry made for a date that's before the begin date of the current period is considered a prior period adjustment.

For example, assume today is 16 August, 2000 and you want to enter time for 1 August, 2000. The person for whom you're reporting time is assigned a weekly time period. Time and Labor looks at the Time Period Calendar to determine that today's date falls within the weekly time period with these dates: 6–18 August. In this case, any time reported before August 6 (the begin date of the current period) is considered a prior period adjustment.

Note. You assign time period IDs to time reporters through the Maintain Time Reporter Data page. If none is specified, the system defaults to the time period ID assigned to the time reporter's workgroup.

Days Grace Allowed

This field appears only when you select the **Edit Prior Period Time** check box. Use this field if you want to limit the period of time during which users can enter prior period adjustments.

Enter the number of days you want the system to use to calculate the earliest date for which users can enter adjustments. During time reporting, the system subtracts your number from the current date. It then compares the resulting date to the Time Period Calendar to find the start date of the time period that the date intersects.

As an example, assume the following:

Days Grace Allowed = 30

Current date = 21 June, 2000

Time period = weekly

Date for which time is to be reported = 15 May, 2000

First, Time and Labor subtracts the grace period from the current date: 21 June, 2000 – 30 days = 23 May, 2000. Next, it looks at the Time Period Calendar to determine the start date of the weekly time period in which 23 May, 2000 falls—in this case 21 May, 2000. Therefore, users will be able to enter or edit time for any date greater than or equal to 21 May, 2000.

If you leave the **Days Grace Allowed** field empty, users can enter or edit time in any prior period.

Prior Period Message Display

Select this field if you want the following message to appear above the blue title bar on the Weekly Elapsed Time and Weekly Punch Time page when a user accesses the page for a prior period *“Reported time on or before xx/xx/xxxx is for a prior period.”* (xx/xx/xxxx represents the applicable date).

Note. If you select **Prior Period Message Display**, but do not select **Edit Prior Period**, users who access the Weekly Elapsed Time page for a prior period will see the message, but will not be able to edit time. (All quantities will read 0.000000.)

Use TL System Date

This field is available for testing purposes and appears only when the system is not in production mode (that is, the Production Environment check box on the TL Installation page is not selected). It enables you to select a date that the system will consider as the current date so that you can test the functionality you define for prior period adjustments.

TL System Date

The TL System Date field only appears when you select the **Use TL System Date** check box. Enter the date you want the system to consider as the current date for testing purposes.

Group Access

The Group Access area of the page identifies the groups of time reporters that users associated with this permission list can access. That is, it defines the set of time reporters for whom users can view, update, and delete time reporting data.

If you do not select any groups, access to time reporter data will be controlled by your organization's Department Security. Users will be able to enter and update time reporting information for those people within their own department and any subsidiary departments.



For more information about department security, see *Administering Security* in the *PeopleSoft Application Fundamentals PeopleBook*.

Group ID

Select the Dynamic or Static Group of time reporters that you want users associated with this permission list to be able to access.

Group Type Indicator

This field indicates whether the group you selected is a Dynamic Group or a Static Group.

Dynamic Groups are comprised of time reporters who met the group selection criteria as of the time you last refreshed the dynamic group. Time reporters are automatically added and removed from dynamic groups as their ability to match the selection criteria changes.

For more information about refreshing group membership, see *Refreshing Dynamic Groups*.

Static Groups are comprised of time reporters who met a specific set of criteria at the time the group was established. Time reporters stay assigned to a static group unless you remove them.

Viewing Users Assigned to a Row Security Permission List

You can use the Row Security Users page to view the list of user IDs associated with any row security permission list that's being used in Time and Labor.

Row Security Users Page

Usage	Use the Row Security Users page to view the User IDs associated with a particular row security permission list.
Object Name	TL_ROWSEC_MEMBERS
Navigation	Define Business Rules, Define Time and Labor, Enroll, TL Permission List Security, Row Security Users
Prerequisites	This is the second page of the Row Security Permission List component. You must complete the Security by Row Security Permission List page first.
Access Requirements	Enter the name of the Row Security Permission List.

Row Security Permission List Row Security Users

Row Security Permission List: ALLPANLS

Users in Row Security Permission List [Find](#) | [View All](#) First 1-2 of 2 Last

User ID	Description
KU0081	
PSEM	

Row Security Users page

The system displays the **User ID** and **Description** of each member of this Row Security Permission List.



You assign row security permission lists to User ID's through the User Profiles component you access through the PeopleTools menu.

Creating Rules in Time Administration

Time Administration provides you with four separate online tools for creating, maintaining, and applying your organization's compensation, task, and exception rules to both reported and scheduled time: templates, actions and conditions, SQL objects, and user exits. This section contains detailed information about how to use the rule creation tools in PeopleSoft Time and Labor, instructions on how to combine rule objects into rules, as well as a methodological section with recommendations on rule design, and a brief overview of the batch process that executes rules.

Understanding Time Administration

Although the processes involved in Time Administration are complex and varied, the Time Administration module can be reduced to two main components:

Create Rules	Create Rules consists of the online tools that enable you to create, compile, and apply rules to reported and/or scheduled time.
Batch Processing	Time Administration Batch Processing applies your rules to time reporter data and generates payable time from reported and/or scheduled time.

Create Rules

Create Rules consists of the following online tools for rule definition. These tools were designed to accommodate a wide variety of rule creation needs as well as different levels of rule complexity.

Templates

You can use templates to quickly create a variety of rules you want the Time Administration program to execute when processing reported and/or scheduled time—such as compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing. There are over 40 rule templates delivered with the product.

For more information on templates and how they are used, see *Using Templates to Create Rules*.

Actions and Conditions

Actions and Conditions enable you to define actions and conditions independently of one another and then join them to create rules. Because actions and conditions are independent of one another, once you've defined them, you can combine them in new ways to create additional rules without having to engage in unnecessary or repetitive work. You cannot perform select actions or subqueries when using Actions and Conditions, so if your rule requires either of these, you should use SQL Objects.

For more information on actions and conditions, see *Using Actions and Conditions to Create Rules*.

SQL Objects

SQL objects are the most flexible PeopleSoft Time and Labor rule creation tools. You can use SQL objects to create rules using select statements, insert statements, update statements, delete statements, table joins, and subqueries.

For more information about SQL objects, see *Using SQL Objects*.

User Exits

With delivered rule templates and rule objects (Actions, Conditions, and SQL objects), you should be able to build rules that address most of your business needs. You'll only need to use a user exit when a particular business rule cannot be accommodated by delivered rule templates or rule objects.

You can use user exits to add highly complex functionality to your Time and Labor system. With user exits, you can add PeopleCode and Application Engine sections to your regular Time and Labor processing. Also, if you want to build a very complex Time and Labor rule, you have the option of creating the rule in Application Engine and adding a user exit that calls the rule during processing.

When you write user exits, you need to add AE sections to the AE program `TL_TA_RULES`. You can use all the AE constructs supported by PeopleTools (SQL, PeopleCode, looping constructs like Do When, Do While, and so on).

For more information on user exits, see *Using SQL Objects*. For more information about Application Engine programming, see *Application Engine* in your PeopleTools documentation.

Assembling Rule Objects, Components and Elements into Rules

When you use the Actions and Conditions or SQL Objects pages, you won't be creating full-fledged rules, but the building blocks of rules—what we refer to as *rule components*. To define a complete rule, you'll need to link these components to other components, place them in the proper order for processing, and specify the period of interest for the resulting rule. In addition, you'll need to group rules into Rule Programs and then link these rules to your time reporters through workgroups. Creating a complete rule involves the following steps:



Template built rules are fully defined rules. The following steps apply to rules created using actions and conditions and SQL objects.

To complete your rule definition:

1. Define the rule.

The first step in rule creation is to define the elements of each rule using Actions and Conditions or SQL Objects.

2. Define the rule period.

To define the data requirements for your rule, you need to specify the period of interest for the rule using the Define Rule Header page. Valid periods include PeopleSoft-delivered periods and any time periods that you have created using the Time Period pages. The system uses time periods to determine the amount of time on which the rule will act. Will it act on a day's worth of data, a week, or a month of time? The Time Administration program also uses the time period to determine which reported time to load into the working tables during processing.

3. Define rule steps.

Once you have specified the period of time on which your rule will act, you must order the individual rule components into rule steps using the Define Rule Steps pages. These steps determine the processing order of the components. It is important to note that SQL processes the records in sets. Rule steps must be properly ordered for set processing. You might find it helpful to review delivered rule templates (with the rule ID prefix of TEMPLATE) to see how rule steps are organized for set processing. It is recommended that you test the SQL statement for each rule step to ensure that it produces the desired results before continuing with the next step. You should test the SQL for each rule step using your database query tool. You may need to replace Meta-SQL with platform specific SQL before testing the SQL statement.

4. Assign the rule to a rule program.

After you organize your rule components in the proper order to create a fully formed rule, you need to add your rules to a rule program using the Rule Program and Program Detail pages. The rule program specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules.

5. Attach the rule program to a workgroup.

The final step in defining a rule is to assign the Rule Program containing your rules to a workgroup. To do this you'll use the Workgroup page. The Rule Program determines which rules can be processed for the time reporters in the workgroup—if a rule does not exist in the Rule Program associated with a workgroup, no member of the workgroup can be processed using that rule.

How Are Rules Created?

All rules in Time and Labor are written in SQL—whether you use PeopleSoft delivered templates to build your rules, actions and conditions, or SQL objects. However, because you will probably create most of your rules using templates, and the templates already contain the basic logic, underlying structures, and all the SQL you need, you don't have to be a SQL expert to create rules. Even so, it will help to have a good understanding of SQL—particularly if you use actions and conditions or SQL objects to define your rules, since these tools give you more direct access to SQL logic and language. In addition, to properly create, test, and troubleshoot your rules, you will need to understand the structure of a SQL statement as well as the basic procedures for converting business rules into SQL rules.

SQL Actions and Conditions

At their simplest level, rules are built out of series of SQL actions and conditions. Conditions are the criteria that must be met in order for a specific action to take place; actions are what a rule does when its conditional criteria have been met. Take the classic example of overtime pay for hours worked over 8:

Example

Condition/action: If the time reporter works more than eight hours in a day, then create a halftime premium for every hour worked over eight.

In this example, the condition is “If a time reporter works more than eight hours in a day,” while the action is “then create a halftime premium for every hour over eight worked.” If you had to translate this rule into SQL language compatible with the Time and Labor system, this is what the initial coding steps might look like:

```

--- AE STEP: 1 -----
-----

--- Truncate TL_IPT2.

DELETE FROM PS_TL_IPT2


--- AE STEP: 2 -----
-----

--- Truncate TL_WRK01.

DELETE FROM PS_TL_WRK01


--- AE STEP: 3 -----
-----

--- Truncate TL_WRK02.

DELETE FROM PS_TL_WRK02
```

```

--- AE STEP: 10 -----
-----

--- SQL_ID: TEMPL010_S10

--- Identify daily records with total hours > Daily Threshold Hours (Specified
by the customer).

INSERT INTO PS_TL_WRK01

(DUR

, EMPLID

, SEQ_NBR)

SELECT

A.DUR

, A.EMPLID

, MIN(A.SEQ_NBR)

FROM PS_TL_IPT1 A

WHERE 8 < (SELECT SUM(B.TL_QUANTITY)

FROM PS_TL_IPT1 B

WHERE B.EMPLID = A.EMPLID

AND B.DUR = A.DUR

AND B.SEQ_NBR <= A.SEQ_NBR

AND B.PUNCH_TYPE IN ('0', '1', '3', '4', '5')

AND B.TRC IN ('HOL', 'MEAL', 'REG', 'SPCL', 'STAR'))

AND A.PUNCH_TYPE IN ('0', '1', '3', '4', '5')

AND A.TRC IN ('HOL', 'MEAL', 'REG', 'SPCL', 'STAR')

AND EXISTS (SELECT 'X'

FROM PS_TL_CALENDAR J

WHERE J.PERIOD_ID = 'PSWEEK'

AND J.START_DT <= A.DUR

AND J.END_DT >= A.DUR)

GROUP BY A.DUR, A.EMPLID

```

ORDER BY A.DUR, A.EMPLID

If you were to use the Daily Threshold templates provided by PeopleSoft Time and Labor to create the overtime rule above, all you would need to do is specify the threshold (the maximum number of hours) that a time reporter can log before they begin earning overtime; the time reporting code (TRC) representing the type of time you are measuring (for example, regular hours); and the appropriate time reporting code to use for overtime pay. The template will automatically generate the SQL on which the rule is based. For example, Template010 says:

When a time reporter reports time under time reporting code **a** and the sum of hours is greater than **b** in the specified period (**c**), then all hours in excess of **b** will be under TRC **d**.

To create your rule, you open Template010, enter values for variables a, b, c, and d, then save the new rule under a unique rule ID. You then add the rule to a rule program on the Rule Programs page and assign the rule program to a workgroup.

What do Rules Do?

In PeopleSoft Time and Labor, rules specify how work and nonwork hours should be measured, processed, and paid. They tell the system what to do with reported or scheduled time and how to do it. For example, suppose a time reporter reports 1 hour of time on a given day as mealtime. This time may not be meaningful in its raw form. Before this time can become payable time, you need to tell the system how to process it. Is it paid time? Is the meal covered by a meal allowance? Is the time reporter's meal paid if he works less than four hours in a day? The rules you create in Time Administration answer these questions. They give time meaning from a compensation, project costing, or project planning perspective.

You can create many different kinds of rules to satisfy many different purposes using Time Administration's online pages. These rules include (but are not limited to) the following types:

Daily Threshold	An example of a daily threshold rule is one that specifies that if a time reporter works more than a certain number of hours on a given day, any hours in excess of this limit should be tagged with a time reporting code (TRC) for overtime. For example, this would enable you to pay a time reporter overtime for any work exceeding 8 hours in a day.
Specific Day	An example of a specific day rule is one that states that if a time reporter reports hours that exceed a certain limit for all jobs on a specific day, the system should automatically tag all the hours reported with a special time reporting code (TRC). This would enable you to designate a special rate of pay for that day.

Period Threshold	An example of a period threshold rule is one that specifies that if a time reporter works more than a limited number of hours in a week (or a rolling 7-day period), those hours exceeding the limit should be tagged with a time reporting code (TRC) for overtime. For example, this would allow you to pay a time reporter overtime for any work exceeding 40 hours in a week.
Guaranteed Hours for Nonscheduled Days	A guaranteed hours rule, is one that specifies that if a time reporter is required to work on a nonscheduled day (or a day off), the system should automatically record a specific minimum number of hours for that time reporter. It should also tag those hours with a time reporting code indicating that the employee is to receive a premium. If the time reporter works more than the minimum, all hours worked should be tagged with the same TRC. This allows you to guarantee payment for a minimum number of hours.
Holiday Rule	An example of a holiday rule, is one that specifies that if a time reporter reports hours on a scheduled holiday, as well as on the day before and the day after the holiday, the system should tag all hours worked on the holiday with a holiday time reporting code (TRC) to designate a special holiday pay rate. You could also create a holiday rule that specifies that if a holiday exists in a given week and a time reporter reports hours on the holiday, the system should automatically create a special holiday TRC in the amount of the employee's average daily hours over the past 10 days.
Consecutive Days	An example of a consecutive days rule is one that specifies that if a time reporter works a certain number of days in a row, then all hours on days that are greater than or equal to the 7 th day should be paid using a special time reporting code (TRC)—until the time reporter receives his/her first day off.
Missing Punch	An example of a missing punch rule is one that instructs the system to automatically enter a specific punch if a time reporter forgets to punch in or out. So for example, if a time reporter does not punch out for a specific break, the system will automatically record the break anyway.

Exception	An example of an exception rule is one that specifies that if a time reporter reports more than a certain number of hours (for a specific task, job, or all jobs combined), then the system should create an exception. Such a rule can be used to warn managers when time reporters are reporting an excessive number of hours. Another type of exception rule can be created to warn managers when time reporters are working an excessive number of hours without a break.
Approval Required	An example of an approval required rule is one which specifies that all time reported to a certain time reporting code (say one associated with a specific task or job) requires manager approval before being paid. Such a rule allows you to control who gets paid for each type of work.
Attendance	An example of an attendance rule is one that specifies that if a time reporter clocks in more than a certain amount of time after the scheduled start time, an exception should be created. This class of rules enables you to establish attendance tracking.
Default	An example of a default rule is one that specifies that any time reported without a specific time reporting code (TRC) should automatically be assigned the default code Reg (Regular Pay).



In addition to the rules described here, you can create many other kinds of rules using PeopleSoft Time and Labor's online tool set. These rules and the tools used to define them are discussed in greater detail in the following sections.

Batch Processing

The batch process in PeopleSoft Time and Labor is the process that generates payable time. Among other things, it executes the rules you define using Time and Labor's online tools for rule creation, selects the appropriate time reporters for processing, combines time reporters into batches for efficient processing, determines the period to process, and calculates prior period adjustments.

Batch Processing Steps

The batch process in PeopleSoft Time and Labor consists of the following steps.

To run the Time and Labor Batch Process:

1. Determine time reporters to process.

This process determines which time reporters should be processed based on the parameters you set on the Process Time Admin Page. This process can determine whether a time reporter's information has changed since the last run of Time Administration and only process the reporters who enter new information. Depending on your selection on the run control page, you can process entire workgroups, exclude certain individuals from those workgroups while processing everyone else, or select individuals from one or more work groups to avoid processing large numbers of employees.



For more information about how to use the Run Control page to set batch processing parameters, see Step 1 - Determine Time Reporters to Process.

2. Separate time reporters into batches.

Processing in PeopleSoft Time and Labor is based on set processing rather than on row-by-row processing. This means that when Time Administration processes and applies rules to time reporter data, it does not process one time reporter at a time. Instead, it gathers all employees with the same basic rule profiles and processing requirements and processes them together as a set.

In PeopleSoft Time and Labor, the Create Batches process is responsible for creating these processing sets. It does this by taking the list of time reporters created by the Determine Time Reporters to Process function and organizing them into batches based on the following two characteristics: common work group affiliation and common month and year.



You must determine the number of transactions to process in a set by selecting a batch size parameter on the TL Installation Page. If the size of the set is too small, too much effort is used to prepare the SQL contained in your processing rules. If the set is too large, the SQL statements that make up your Time Administration rules will not be executed at the optimal rate. You will need to determine the optimal size of your batches based on your operating environment and some trial-and-error runs.



For more information about the Create Batches process, see Step 2 - Combine Time Reporters Into Batches.

3. Build rule map.

This process constructs a "rule map" to determine how far back into the past and forward into the future Time Administration must go to retrieve, for each batch, the data needed to run each individual rule in a time reporter's Rule Program and the maximum amount of data encompassing the entire group of rules in the Rule Program.

In this documentation, we'll refer to the time span between the farther point back in the past

and the furthest point forward as the *final period of interest*. The final period of interest can expand and shrink in response to different factors, including prior period adjustments and how far into the future time reporters enter time data.

In addition to determining the period of interest, the Rule Map stores information on the application engine (AE) section containing the rules that must be processed for each batch of time reporters.



For more information on how the system builds rule maps and determines periods of interest, see Step 3 - Build Rule Map.

4. Retrieve time reporter profile.

This process extracts employee data for each batch of time reporters from different tables in the HRMS system and loads it into a single working table—TL_PROF_WRK—that you can refer to each time you need basic employee data within a rule. Thus, rather than having to refer to multiple tables, you can look to a single table containing data on the employees in each of your batches for the period of interest defined by the Build Rule Map process.



For more information on this process, see Step 4 - Build Time Reporter Profiles.

5. Punch matching.

This process selects all appropriate punches for processing and applies punch rounding rules, day breaker logic, and calculates the duration of each punch through punch matching. This process feeds the matched punches to the next step in the batch run—Create Intermediate Payable Time (Step 6).



For more information on this process, see Step 5 - Punch Matching.

6. Create Intermediate Payable Time.

This process loads all reported and scheduled time for the period of interest for all time reporters who need to be processed into a temporary working data store called Intermediate Payable Time. This working data store is made up of five working tables (TL_IPT1—TL_IPT5). This process loads data into the first instance of the IPT table (TL_IPT1). The Time Administration batch process applies rules to the time reporter data stored in these working tables. It also applies any default task information to this data.



In your Time and Labor rules, you'll be manipulating data contained in the Intermediate Payable Time tables. Rules are applied to data in these tables rather than to data in scheduled or reported time in order to protect the integrity of the source tables. The IPT tables are the working tables where the system processes (applies) the actual rules.



For more information on this process, see Step 6 - Create Intermediate Payable Time.

7. Attendance Tracking

This process tracks attendance violations committed by punch time reporters, including Tardies, Long Lunches, Early Outs, and Long Breaks, and triggers recommended actions to be logged in the Attendance Action (TL_ATTEND_ACT) table in response to these violations.



For more information about this process, see Step 7 - Track Attendance.

8. Process rules.

This process uses the "Rule Map" created in Step 4 to call the appropriate AE section for each rule and each period of interest. Each rule is processed for every time reporter to whom the rule applies at the same time.



For more information about this process, see Step 8 - Process Rules.

9. Perform post-rules processing.

Once rules execution is complete, the system carries out the following additional processing steps. The system:

- Validates the data generated as a result of rules processing—specifically task data and TRC data.
- Updates each time reporter's task profile.
- Checks leave and comp time balances.
- Applies post rules rounding to processed time data.
- Calculates estimated gross amounts.



For more information on this process, see Step 9 - Perform Post Rules Processing.

10. Prior period adjustment processing.

This process generates offsets in response to changes in Reported Time and effective-dated information that affects Payable Time.



For more information on this process, see Step 10 - Process Adjustments.

11. Update Payable Time.

This process takes the final results of Intermediate Payable Time processing and inserts them into the Payable Time table. At this point the distribution process makes the data available to payroll or other subscribers to Time and Labor.



For more information on this process, see Step 11 - Update Payable Time.

12. Process Exceptions.

This process updates the exceptions table TL_EXCEPTION to include any new exceptions generated during the current batch run. When this table has been updated, you can go to the Manage Exceptions page to approve or resolve exceptions.



For more information on this process, see Step 12 - Process Exceptions.

13. Update TR Status.

In this final step of the Time Administration run, the system resets the values in the TL_TR_STATUS record for each processed time reporter to reflect the fact that the time reporter does not need to be reprocessed unless there are changes to data that may affect payable time. If a time reporter has unresolved exceptions—in other words, if there is an exception on the TL_EXCEPTION table—the values in the TL_TR_STATUS record will not be reset.



For more information on how and when the system updates the TL_TR_STATUS table, see Step 13 - Update TR Status.

Rule Methodology

When you create rules in Time Administration, you are translating your organization's business rules into SQL statements that the system can understand. While the Time Administration pages enable you to implement rules, they are not design tools. So, before you enter any information in these pages, you'll need to design and organize your rule steps, consider the SQL involved, and decide which Time Administration options you'll use. In this section we provide guidelines for understanding, designing, and organizing your rule steps. At the end of this section, we provide an example that outlines more explicitly how to enter rule steps into the system.



Use the simplest building blocks when creating your rules. Whenever possible, use or modify the delivered rule templates rather than creating new actions and conditions or SQL objects to define your own rules.

Design and Organize Rule Steps

The first thing you need to do is determine whether you can use one of the delivered rule templates or if you will need to create either actions and conditions or SQL objects. Consider which rules or parts of rules will be reused. If you can use part of a rule repeatedly or in many ways, you will want to create an action or condition or SQL object so that you can reuse that part of the rule.

Think about dependencies—what should be checked or processed first. If you want to act on a subset of data or the results of a query, you have to define that data or subquery first. If you only want to act if a certain condition exists, you must create the statement to determine if the condition is true before inputting the action. If you want to perform multiple actions on a single row, you must think about processing order. You will specify and order your rule steps on the Define Rule Steps page.

Avoid broad or redundant querying/processing. For optimal performance, create conditions that retrieve the fewest possible records and still satisfy your data needs. For example, specifying certain column names in your Select statements is more efficient than selecting all. Use the logical operator IN instead of OR, since IN is processed faster than OR.

If you want to create a rule that concerns a certain period of time, you must define a valid rule period ID for use in that rule.

Use all the tools available to you. When possible, use PeopleSoft-delivered objects. Create value lists instead of multiple conditions. Several working tables are delivered within rules, but you can create your own working tables. They must be temporary tables.



Do not modify delivered working tables. If any of the delivered working tables are modified, template-built rules will abort or generate unexpected results.

Translating Business Rules into SQL Rules

Before you create rules in PeopleSoft Time and Labor you should have a clear idea of how you manage both time and time reporters in your organization. You should have your business rules in front of you as you begin—whether they are embedded in union contracts, the terms of employment you provide to new hires, or in government documents and legislation. Certain terminology in these documents will have counterparts in particular SQL conditions and actions. Words such as *update*, *replace*, and *substitute* frequently imply the SQL action *update*. Words such as *where*, *if*, *when*, and *in case of* imply dependencies and conditions.

Using Working Tables Within Your Rules

Before Time Administration can execute a rule, it must move the time reporter data needed to run the rule from scheduled and reported time into a data store known as Intermediate Payable Time. Rules are applied to information in the data store rather than to data in scheduled or reported time in order to protect the integrity of the source data. The Intermediate Payable Time data store is made up of the following five tables:

- TL_IPT1
- TL_IPT2
- TL_IPT3
- TL_IPT4
- TL_IPT5

In addition to the Intermediate Payable Time tables, you can access a number of other working tables in the system. Most of these working tables start with the prefix TL_WRK.



You can create your own working tables if you need to store data temporarily, but they must be temporary tables.

Rules for Using Working Tables

When you create rules in Time Administration, you should keep the following things in mind:

Time Administration automatically loads much of the data you need to execute your rules into the Intermediate Payable Time table TL_IPT1. In your rules, you can move data back and forth between this table and the other Intermediate Payable Time tables. For example, your rule could move time data from TL_IPT1 to TL_IPT2, apply a specific TRC to this time, and then update the original row of data in TL_IPT1 with the new TRC associated data.

When creating rules, you need to decide when and how to move data from TL_IPT1 to other working tables. After your rules process and modify the data in these other tables, you need to return any processed data you want to send to Payable Time back to TL_IPT1--the table where you found the original, raw data. That is, you need to push the data in its final form—the form in

which you want it to be sent to Payable Time—back to TL_IPT1. If the data does not exist in TL_IPT1, it will not become part of Payable Time.

You must always truncate (or clear) working tables prior to moving data into them. This is to insure that the data that may be left over in those tables from previous rules processing does not interfere with or corrupt the new data. To truncate any working table you can use the %TruncateTable command, which is included in the list of Meta-SQL commands supported by PeopleSoft. However, you should never truncate or delete the data in TL_IPT1—it contains time data in raw form that is needed to execute your rules. If you delete this data your rules will be left with nothing to process.

You can move data from external tables (nonworking tables) into your working tables. However, if you do not plan to process or modify this data, but only need to verify it (in a condition statement, for example), you should consider reading the external tables directly rather than moving large quantities of information into the working tables. The reason for this is that moving large quantities of data into TL_IPT1 could affect processing speed.



Important! You should never modify delivered working tables.

Example

The following example illustrates how you might go about translating a business rule into a SQL rule, and how the resulting SQL rule moves data from TL_IPT1 to other working tables in the system. Let's suppose that your business rule states: All hours worked in excess of 40 hours in any one week shall be paid at the rate of 1.5 times the employee's applicable hourly rate.

The first step is to rewrite the business rule in a simpler sentence. If possible, translate business concepts into PeopleSoft Time and Labor terms. For example, you recognize that the rate of 1.5 times the normal rate implies a different (overtime) TRC. You can rewrite this business rule as: Replace all hours in excess of 40 in a week with TRC "OT 1.5."

Next, you will determine what type of action you want the system to take. Most business rules will require an insert or update and may require subqueries to determine more precisely which rows to affect. This example requires the update action.



Note. If your business rules require you to store the original rows and just add rows where the TRC changes, you would create an insert action.

Then you will consider what conditions exist in your statement. In our example, "in excess of 40 hours" and "in one week" are conditions.

To accomplish this rule, you need 7 steps. Steps 1-2 are actions; Steps 3-7 are SQL objects.

Step 1 — Delete TL_IPT2 (truncate working table)

Step 2— Delete TL_IPT3 (truncate working table)

Step 3 — Insert affected row (Friday, 10, 46, REG) into TL_IPT2 with hours over threshold and new TRC.

Step 4 — Insert rows after affected row (Saturday, 6, 52, REG) into TL_IPT3.

Step 5 — Calculate TL_QTY-TL_QTY in work record (TL_IPT2). Update row (Friday, 10, 46, REG becomes Friday, 4, 40, REG) in TL_IPT1.

Step 6 — Insert new row (Friday, 6, 46, OT1.5) into TL_IPT1 with new sequence number.

Step 7 — Update TL_IPT1 TRC with 'ot1.5' where exists in TL_IPT3.

Data in IPT1

(The shaded rows in the following tables represent Intermediate Payable Time created by these rule steps. Changes to the original TL_IPT1 data are bolded.)

<i>Day</i>	<i>Hours</i>	<i>Total week hours</i>	<i>TRC</i>
Monday	8	8	REG
Tuesday	10	18	REG
Wednesday	8	26	REG
Thursday	10	36	REG
Friday	10	46	REG
Saturday	6	52	REG

Data in IPT2

<i>Day</i>	<i>Hours</i>	<i>Total week hours</i>	<i>TRC</i>
Friday	4	40	REG
Friday	6	46	OT 1.5

Data in IPT3

<i>Day</i>	<i>Hours</i>	<i>Total week hours</i>	<i>TRC</i>
Saturday	6	52	OT 1.5

Data in IPT1 after processing

Day	Hours	Total week hours	TRC
Monday	8	8	REG
Tuesday	10	18	REG
Wednesday	8	26	REG
Thursday	10	36	REG
Friday	4	40	REG
Friday	6	46	OT1.5
Saturday	6	52	OT1.5



Note. This simple example ignores the TRC. A more complicated example could also include a daily rule run before this and might also create overtime.

Using Value Lists within Rules

In situations where you want the condition or action clause of a rule to apply to multiple values, rather than a single value—such as multiple TRC codes, multiple shifts, or multiple task groups—you should consider creating value lists rather than defining multiple conditions.

For example, you may have a rule that tells the system to create premium time when time reporter reports more than 40 hours to time reporting codes **Regular**, **Sick**, **Vacation**, and **Holiday**. Before you create this rule, you set up a TRC value list and add the TRCs for **Regular**, **Sick**, **Vacation**, and **Holiday**. When Time Administration executes the rule, it will refer only to the four TRCs in your list. Another example: say you want to restrict the punch types that can follow an In punch. You can create a value list that includes only those punch types you deem valid. You can then use Rule Template240 to create a rule that generates an exception when an invalid punch type follows an In punch. Value lists can be used within template-built rules.

The following table shows each type of list you can create and where the values are defined.

Type of Value List	Where Values are Defined
Companies	PS_COMPANY_TBL
Dept Ids	PS_DEPT_TBL
Employee Statuses	Translate Values for EMPL_STATUS
Employee Types	Translate Values for EMPL_TYPE
Grades	PS_SAL_GRADE_TBL

<i>Type of Value List</i>	<i>Where Values are Defined</i>
Jobcodes	PS_JOBCODE_TBL
Paygroups	PS_PAYGROUP_TBL
Position numbers	PS_POSITION_DATA
Punch Types	Translate Values for PUNCH_TYPE
Steps	PS_SAL_STEP_TBL
Shifts	PS_SCH_SHIFT_TBL Shifts page
TCD Groups	PS_TL_TCDGRP_TBL TCD Group
Taskgroups	PS_TL_TASKGRP_TBL Taskgroup page
TRCs	PS_TL_TRC_TBL TRC Setup page
Union Codes	PS_UNION_TBL
Workgroups	PS_TL_WRKGRP_TBL Workgroup Setup page

Value List Page

Usage	Use the Define Value List page to group together various codes for rules processing.
Object Name	TL_VALUE_LST_PNL
Navigation	Define Business Rules, Define Time and Labor Rules, Setup 1, Define Value List
Prerequisites	Before you can create lists, you might need to define a code for each item you want to add to the list. The types of codes you need to create determine which page to use.
Access Requirements	Enter the List ID and select the list type.

Value List

List ID: KULEAVETRC	List Type: TRC
Description: D	Short Description: D

Value List Detail

Value Group	Description	
KUCT1	Services Comp Time Taken Plan	-
KUCT2	Retail Comp Time Taken	-
KUCT3	Hosp Comp Time Taken Plan	-
KUMLO	Reported Leave Time	-
KUVAC	Vacation Time-off	-
+		

Value List page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

List ID The unique ID you assigned to this list appears in this field.

List Type The type of list you are creating is displayed in this field. The table below shows each type of list you can create.

Value List Detail

Value Group Select the values you want to include in your list. Press the add button to add another value to the list.

Defining and Using Rule Elements within Rules

If you need to control how and when rules are applied to different groups of time reporters, you should consider using rule elements. You can define up to five rule elements to represent any type of data you want, and then use these elements within the conditions you create for your rules.

Rule elements can be associated with time reporters two different ways:

- By assigning rule elements directly to time reporters on the Create Time Reporter Data page or the Maintain Time Reporter Data page.
- By positively reporting rule elements when entering time.

Example

Assume you define a rule element called Jobs. You also create the following values for Jobs: HOST, CASHIER, ASST MGR, WAITER. Now, you build a rule that creates a premium if a worker positively reports the value ASST MGR for Rule Element 1. As an alternative, you might build your rule so that the system creates a premium whenever time is reported by a person for whom the value, ASST MGR, has been entered in the Rule Element 1 field on the Create/Maintain Time Reporter Data page.



Both the Time Reporting Template page and the Rapid Time Template page include options to override rule elements.

Rule Element Page

Usage	Use the Rule Element 1 to Rule Element 5 pages to create user-defined values that your rules can evaluate during the Time Administration process. For example, you might use Rule Element 1 to represent jobs and add descriptions (values) for Cashier, Host, and so forth.
Object Name	TL_RULE_ELEM#_PNL (where # equals 1, 2, 3, 4, or 5)
Navigation	Go, Define Business Rules, Define Time and Labor, Setup 2, Rule Element, Rule Element
Prerequisites	None.
Access Requirements	Enter up to ten alphanumeric characters for the name of the rule element.

Rule Element 1 page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.



If you want to re-label the rule element fields, see the instructions in your PeopleTools PeopleBook.

Using Meta-SQL Within Rules

Use Meta-SQL as an alternative to creating complex SQL commands on your own. Meta-SQL allows you to perform many SQL functions by giving you access to complex SQL operations in a shorthand form. Meta-SQL functions expand to platform-specific SQL statements. PeopleSoft Time and Labor uses Meta-SQL to interface with different database platforms. A Meta-SQL operand begins with a percent (%) sign and returns a scalar value.

Almost all Meta-SQL constructs that are visible in PeopleSoft Time and Labor are PeopleTools Meta-SQL constructs that are processed at run-time.



For more information about Meta-SQL you can use in your rules, see your PeopleTools PeopleBook.

Using Common HR Data in Your Rules

If you need to use HR or Time and Labor employee data within your rules, check to see whether the data exists in TL_PROF_WRK before creating multiple joins to tables in HR.

TL_PROF_WRK is a temporary table created at the beginning of the Time Administration batch run. It contains employee-related data retrieved from various HRMS and Time and Labor source tables effective as of the current run. Instead of accessing the various source tables to create a rule, you can create a single join to this table to retrieve information relating to all the time reporters you need to process.



Important! Do not alter the structure of TL_PROF_WRK. Time Administration references this table at different times during the batch run.

TL_PROF_WRK contains fields derived from the following source tables:

#	Field Name	Source	Description
1	EMPLID	TL_EMPL_DATA	Employee Identification Number
2	EMPL_RCD	TL_EMPL_DATA	Employee Record Number – to accommodate multiple jobs
3	NAME	PERSONAL_DATA	Employee Name
4	EFFDT	BADGE_TBL	Effective Date of the Badge

#	Field Name	Source	Description
5	BADGE_NBR	BADGE_TBL	Badge Number
6	HIRE_DT	EMPLOYMENT	Hire Date
7	REHIRE_DT	EMPLOYMENT	Re-hire Date
8	CMPNY_SENIORITY_DT	EMPLOYMENT	Seniority Date
9	SUPERVISOR_ID	EMPLOYMENT	Supervisor ID
10	WORKGROUP	TL_EMPL_DATA	Workgroup ID
11	PAYGROUP	JOB	Paygroup
12	EMPL_STATUS	JOB	Employee Status
13	REG_TEMP	JOB	Regular/Temporary Indicator
14	FULL_PART_TIME	JOB	Full-Time/Part-Time Indicator
15	EMPL_TYPE	JOB	Employee Type Indicator (Hourly, Salaried, etc.)
16	PER_TYPE	PERSONAL_DATA	Personnel Type Indicator
17	COMPANY	JOB	Company
18	JOBCODE	JOB	Job Code
19	LOCATION	JOB	Location
20	COMPRATE	JOB	Compensation Rate
21	UNION_CD	JOB	Union Code
22	DEPTID	JOB	Department ID
23	BUSINESS_UNIT	JOB	Business Unit
24	POSITION_NBR	JOB	Position Number



This table contains data on the employees in each batch of time reporters for the period of interest defined by the Build Rule Map process. Because it only contains data for the period of interest defined by the rule map process, you cannot use it as a source of human resources data for periods extending beyond the period of interest.



For more information on how Time Administration defines the period of interest, see Step 4 - Build Time Reporter Profiles.

Truncating Working Tables

When organizing your rule objects into rule steps on the Define Rule Steps page, your first action should be to truncate the working tables into which you will be transferring time reporter data from the Intermediate Payable Time table TL_IPT1. This is to insure that data that may have been left over in the working tables from previous batch processing does not corrupt the new data. To truncate a working table you can use the %TruncateTable command, which is included in the list of Meta-SQL commands supported by PeopleSoft. However, you should never truncate or delete the data in TL_IPT1—it contains time data in raw form that is needed to execute your rules.



For more information on how to truncate working tables using the %TruncateTable command, see the Define Rule Header: Rule Step Details Page.

Organizing your Rule Elements Into Rule Steps

When you sequence the components of a rule into data manipulation steps using the Define Rule Steps page, it is important that you organize the steps in a logical order. For example, if you need to compare daily reported time to daily scheduled hours, you will need to sum the daily reported time and scheduled time first. Although this could be done in a single step, we recommend that you keep each step relatively simple for maintenance and trouble shooting reasons.

Prioritizing Rules in a Rule Program

It is important to consider rule priority when there are dependencies between the rules in a rule program. Let's say that you've defined the following rules for your organization:

- Default TRC – to set any blank TRC to 'REG'
- Daily 8 – to pay overtime (OT1.5) for hours worked in excess of 8.0 per day.
- Daily 12 – to pay double time (OT2.0) for hours in excess of 12 per day.
- Weekly 40 – to pay over time (OT1.5) for hours worked in excess of 40 per week.

In this example, rules 2 through 4 evaluate time with a TRC of REG. In addition, rules 2 through 4 are replace type rules (in which REG will be reduced to the threshold number and a new TRC created for the excess hours). Based on this information, you will want to order your rule program as follows:

1. Default TRC – because other rules need to evaluate TRC REG.
2. Daily 12 – it needs to be executed before Daily 8 rule because if hours are over 12, REG will be set to 12. If the Daily 8 rule runs first, the Daily 12 rule will not generate any double time because all records with hours over 12 will be set to 8.0.
3. Daily 8 – because Daily 12 will reduce hours in excess of 12 to 12.

4. Weekly 40 – should be executed last because it needs to capture all the REG hours (including REG hours that have been reduced by daily rules and REG hours that have not been altered by daily rules).

Testing Your Rules

You should always test any rule you create using an interactive SQL tool — MS SQL Server Query Analyzer or another testing tool such as SQL*Plus. Otherwise, the system could generate incorrect results when it processes your rules.



Note. When testing a template-built rule, you may need to replace Meta-SQL with platform specific code and enter values for variables that users would normally insert into the template's condition and action statements through the template pages.



For more information about templates, see [Using Templates to Create Rules](#).

General Setup Steps

There are two setup steps that you need to carry out prior to creating rules if you are using either actions and conditions or SQL objects to define your rules:

1. You need to specify which tables (or records) you will be accessing in your rules and what SQL actions you want to allow or prevent your rules developers from performing on these tables. You'll do this using the Working Tables page.
2. If you create a condition that references a field that is not part of the record being updated, you need to define a relationship definition (or join) between the record you are updating and the external record. To do this you should use the TL Relationship Definitions page. Setting up a relationship definition eliminates the need for you to code this relationship manually. If you are creating rules using actions and conditions, it is mandatory that you set up this relationship definition beforehand (if you need to refer to external tables). This is because you cannot define a table join within the rule itself. If you are using SQL objects, you create a table join directly in the rule.

Understanding the Working Tables Page

Before creating rules using actions and conditions or SQL Objects, you must identify the tables (or records) you plan to access and the actions you want to allow or prevent rules developers from performing on these tables. For example, you may not want rules developers to delete certain tables--or even update rows in these tables--because they contain information that should not be altered. Using the Time Administration Working Tables page, you'll be able to control the type of access rules developers have to specific tables and how they use tables in their rules.

Working Tables Page

Usage	Use the Working Tables page to grant SQL access to tables in the T&L and HR systems.
Object Name	TL_TA_WORK_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Working Tables, Working Tables
Prerequisites	None.
Access Requirements	None.

Working Tables							
Load Record Fields							
Find View All First 17-24 of 384 Last							
Record (Table) Name	SQL Access Delete	SQL Access Insert	SQL Access Select	SQL Access Update	AE State Record	Time Admin Runtime Table	AE Program
TL_ACT_SUPVR	☒	☒	☒	☒	☒	☐	+ -
TL_ACT_TKPRF	☒	☒	☒	☒	☒	☐	+ -
TL_ACT_TKTMP	☒	☒	☒	☒	☒	☐	+ -
TL_ACT_TMPDL	☒	☒	☒	☒	☒	☐	+ -
TL_ACT_TRC	☒	☒	☒	☒	☒	☐	+ -
TL_ACT_TTHRS	☒	☒	☒	☒	☒	☐	+ -
TL_APPRV_AET	☒	☒	☒	☒	☒	☐	+ -
TL_APP_ITEM	☒	☒	☒	☒	☒	☐	+ -
View All First 17-24 of 384 Last							

Working Tables page

The tables listed in the **Record (Table) Name** column are the records/tables to which you can grant (or deny) SQL access. Although we have predefined access to many tables in the Time and Labor system, you can change the delivered settings and can insert new rows for additional tables that you need to access within your rules. All tables in the HRMS system are available for rules development. The only tables you do not have access to are Tools tables. The SQL Actions you can enable are:

SQL Access Delete

Click on **SQL Access Delete** if you want to be able to delete a field or row in the table listed in the **Record (Table) Name** field.

Note. If you use an Expression Text field to write free-form SQL, you can delete a table even though the table is defined with **SQL Access Delete** turned off on the Working Tables page.

SQL Access Insert	Click on SQL Access Insert if you want to be able to insert rows in the table listed in the Record (Table) Name field.
SQL Access Select	Click on SQL Access Select if you want to be able to select fields in the table listed in the Record (Table) Name field.
SQL Access Update	Click on SQL Access Update if you want to be able to update rows in the table listed in the Record (Table) Name field.

The Working Tables page contains the following additional fields:

AE State Record	The checkboxes in the AE State Record column allow you to specify which AE State Records rules developers should be able to access when they create SQL objects. If a State Record does not exist in the Working Tables page, it won't be available in the edit tables on the SQL Objects pages.

Note. The Working Tables page is delivered with many AE State records already available for use in SQL objects. If you create new AE State Records, you will need to enter rows for these records on the Working Tables page and specify those that you want to make available for use in your SQL objects.

Time Admin Runtime Table The checkboxes in the **Time Administration Runtime** column enable you to specify which temporary (working) tables used by the Time Administration batch process should be deleted during batch processing. Deletion can take place at several times—one is within the loop Time Administration runs for each batch, and the other is at the beginning of the entire TA process. If a runtime table does not exist in the Working Tables page and is not defined for deletion, it will not be truncated during the batch run.

Note. The Working Tables page is delivered with the runtime tables for Time Administration preselected for deletion. If you create new runtime tables, you will need to enter rows for these tables on the Working Tables page and specify the **AE Program** that they are part of.

AE Program

All runtime tables predefined for deletion are associated with an AE Program in the **AE Program** column of the Working Tables page. If you create your own runtime tables, you must assign these tables to their appropriate AE Program in the **AE Program** column.

Load Record Fields

If you add new records (tables) to the Working Tables page, you must click the **Initiate Field Load** button so that you can access specific fields in these records when creating rules in actions and conditions or SQL objects. If you enter new records on the Working Tables page but forget to click **Initiate Field Load**, the fields won't appear in the prompt tables on the Actions and Conditions or SQL Objects pages.

Warning! If you create new records in Time Administration you must add them to the Working Tables page and grant the appropriate level of access—otherwise the system does not know that they exist, and you can't access them in your rules.

Identifying Working Tables on the Working Tables Panel

All working tables that are truncated during batch processing must be identified on the Working Tables panel and marked as Time Administration Runtime tables. If a runtime table is not listed in the Working Tables panel and is not defined for deletion, it will not be truncated during the batch run. Note that the Working Tables panel is delivered with PeopleSoft delivered runtime

tables for Time Administration pre-selected for deletion (truncation). If you create new runtime tables, you will need to enter rows for these tables on the Working Tables panel and specify the **AE Program** they belong to.

TL Relationship Definitions

You define a relationship definition when you use a condition that references a field that is not part of the record being updated.

If a time reporter belongs to Union 'ABC' and reports more than 8 hours per day under TRC 'REG,' change 'REG' to 'DBL.'

The action for this statement is:

```
UPDATE PS_TL_IPT1
SET TRC = 'DBL'
```

The two conditions for this statement are:

```
WHERE PS_TL_IPT1.TRC = 'REG'
AND PS_JOB.UNION_CD = 'ABC'
```

But to identify the correct effective-dated row and sequence from the JOB table, we would need several additional lines of code comparing the EMPLIDs, EmplRCD#s, and dates in the TL_IPT1 and JOB tables. Setting up a relationship definition eliminates the need for you to code this relationship manually.

TL Relationship Definitions Page

Usage	Use the TL Relationship Definitions page to create relationships between tables.
Object Name	TL_RELATIONSHIP
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Relationship Definitions, TL Relationship Definitions
Prerequisites	You must load record fields on the Working Tables page.
Access Requirements	Enter a Left Record and a Right Record.

TL Relationship Definitions page

Left Record

This field displays the name of the left record you entered to access the page.

Right Record

This field displays the name of the right record you entered to access the page.

Fields

Join Fields 1-5

Enter the fields from each table that the system must use to create a relationship between the tables.

Using Templates to Create Rules

PeopleSoft Time and Labor is delivered with over 40 rule templates. You can use templates to create, quickly, a variety of rules you want the Time Administration program to execute when processing reported or scheduled time. You can create compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing.

Rules consist of condition and action statements. When using a template to create a rule, you enter values for the variables within the template's condition and action statements. For example, if you want to pay overtime when a time reporter reports more than 40 hours per week, you might use one of the Period Threshold templates to create your rule. The rule text of Template020 says something like this:

“When a time reporter reports time under time reporting code *a* and the sum of hours is greater than *b* in the specified period *c*, then all hours in excess of *b* will be paid using TRC *d*.”

To create your rule, you open Template020, enter values for variables a, b, c, and d, then save the new rule under a unique Rule ID. You then add the rule to a rule program on the Rule Programs page and assign the rule program to a work group. That's all there is to it.



For more information about rule programs, see Adding Rules to a Rule Program.

Delivered Templates

For a brief description of each of the rule templates delivered with PeopleSoft Time and Labor see the Template Descriptions chart at the end of this section.

Modifying Rules Created With Templates

Once you save a template-created rule and include it in a rule program, you cannot change the values in the action or condition statements. However, you can open a rule in Update mode, change the action or condition, and then save the rule under a new name. If you need to make changes to a rule that has already been included in a rule program, you will need to temporarily remove the rule from the rule program before you make any changes. After changes have been made, you can then re-associate the rule to a rule program. This safeguard protects the integrity of data that has already been generated by the original rule. After saving the new rule, be sure to update the appropriate rule program.

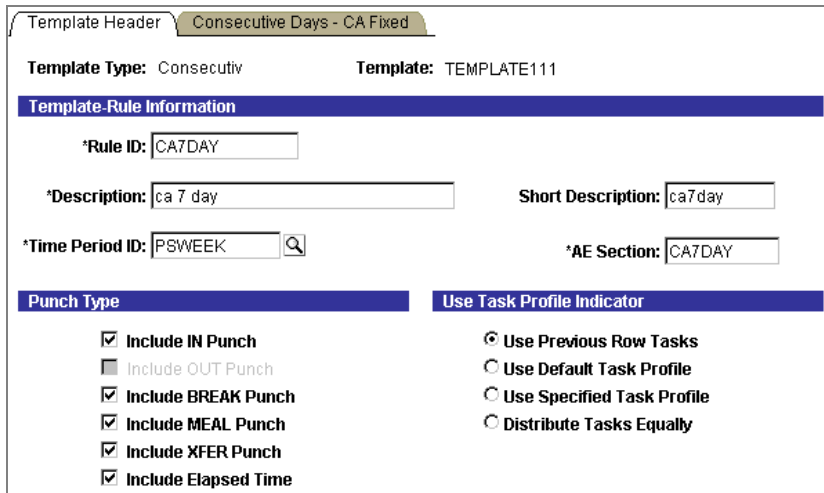
If you know SQL, and wish to modify the actual condition within a template—not simply the values within the conditional clause—you can use the Define Rules component to do so. You might do this, for example, if you want to add multiple conditions to a template-built rule. Be forewarned, however, that if you use a customized condition to build your rule, the only way you can view or make future changes to the rule is through the Define Rules component.

Creating a Header for a Template-Built Rule

You will use two pages to create a rule with a template: the Template Header page, described below, and a detail page that's specific to the type of rule you're creating. The detail page is described later in this section.

Template Header Page

Usage	Use the Template Header page to define or view general information for a rule.
Object Name	TL_TEMPLATE_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Template-Built Rules, Template Header
Prerequisites	None.
Access Requirements	Enter the Template Type, the name of the Rule Template, and the Rule ID.



Template Header

Consecutive Days - CA Fixed

Template Type: Consecutive Template: TEMPLATE111

Template-Rule Information

*Rule ID: CA7DAY

*Description: ca 7 day Short Description: ca7day

*Time Period ID: PSWEEK *AE Section: CA7DAY

Punch Type **Use Task Profile Indicator**

☒ Include IN Punch ☒ Use Previous Row Tasks

☐ Include OUT Punch ☐ Use Default Task Profile

☒ Include BREAK Punch ☐ Use Specified Task Profile

☒ Include MEAL Punch ☐ Distribute Tasks Equally

☒ Include XFER Punch

☒ Include Elapsed Time

Template Header page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.



Template-built rules are not effective-dated, however they are associated with an effective-dated rule program.

Template Type

This field displays the type of template you selected when accessing the page.

Template

This field displays the name of the template you selected when accessing the page.

Rule ID

The unique identifier you assigned to the rule appears in this field.

Time Period ID

The time period ID is used to determine the date range for the selection criteria of the rule. The Time Administration program also uses the time period to determine which reported time to load into the working tables during processing. (Values for the **Time Period ID** field are defined on the Time Period pages.)

Note. It is important that you select the appropriate Time Period ID for a rule. For example, let's say that a period rule is to evaluate 7 days worth of data. You want to make sure that the Time Period ID you specify contains 7 days (no more and no less) in order to produce accurate results.

For more information about Time Periods, see PeopleSoft 8 Time and Labor, “Setting Up Your Basic Tables”.

AE Section

Create a name for the application engine section you want to assign to this rule. You can enter up to eight alphanumeric characters. The Time Administration program requires a section name for processing.

Punch Type

In the **Punch Type** group box, select one or more punch types you’d like to apply the rule to and/or select **Include Elapsed Time**, when applicable. For example, if you’re creating an overtime rule, you may want to select **Include IN Punch**, **Include BREAK Punch**, **Include XFER Punch**. When a template applies only to Punch Time reporters, the option to **Include Elapsed Time** is not available.

Include IN Punch	The rule will be applied to In punches.
Include OUT Punch	The rule will be applied to Out punches.
Include BREAK Punch	The rule will be applied to Break punches.
Include MEAL Punch	The rule will be applied to Meal punches.
Include XFER Punch	The rule will be applied to Xfer punches.
Include Elapsed Time	The rule will be applied to Elapsed Time.

Use Task Profile Indicator

When you are defining a rule that will create rows of time, you must select a task profile indicator to tell the system which task-related data to associate with the new row. This feature applies only to rules that will create data. The options in this group box are not available if a rule will replace data or generate an exception.

Template020 is an example of a rule that can *create* data. It says: “When a time reporter reports time under time reporting codes (TRCs) (x) and the sum of hours is greater than (y) in a specified period (z), then all hours in excess of (y) will be paid under TRC (z). A new TRC will be created for each reported TRC affected by this rule.”

Template110 is an example of a rule that can *replace* data. It says: “When a time reporter reports more than (a) hours under TRCs (b) in a day for (c) consecutive days, then all time reported for day (c) will be paid under TRC (d).”

We’ll use Template020 and the reported time in the table below to illustrate how each option in this group box works. Assume we’re creating an overtime rule that says, if a person reports over 40 hours in a week, create all hours over 40 with the TRC named OT. (The shaded row in the following table represents the created time.)

Day	Hours	Department (Task data)	TRC
Monday	8	A	REG
Tuesday	8	A	REG
Wednesday	10	A	REG
Thursday	8	B	REG
Friday	10	B	REG
Friday	4	Varies per your selection	OT

In our example, the time reporter crosses the 40-hour boundary on Friday, so the system will create 4 hours as OT. The task-data it associates with the 4 hours (in this case, department), depends on the task profile indicator you select:

Use Previous Row Tasks

Select this option if you want the system to use the task-related data associated with the row of data where the condition was met.

Example: The 4 hours of OT will be associated with department B, since this was the department to which the 40th hour was reported.

Use Default Task Profile

If you select this option, the system will look at the time reporter's default task profile to determine which task-related data to associate with the new time.

Example: Let's say the default task profile says that time should be reported to department C. In this case, the 4 hours of OT will be associated with department C.

Use Specified Task Profile

When you select this option, a **Task Profile ID** field appears. You can select the task profile template you want the system to look at in order to determine which task-related data to associate with the new time.

Example: Let's say we select a task profile that says that time should be reported to department A. In this case, the 4 hours of OT will be associated with department A.

Distribute Tasks Equally

Select this option if you want the system to first determine the percentage of time the time reporter reported to each task, then use the same percentages to allocate the created time across the reported tasks.

Example: Of the 44 hours reported, 26 (or 60 percent) were reported to department A and 18 (or 40 percent) were reported to department B. (We're using round numbers here for simplicity.) The system will therefore allocate 60% of the 4 OT hours (or 2.40 hours) to department A and 40% of the 4 OT hours (or 1.60 hours) to department B.

Task Profile ID

This field appears only when you select the **Use Specified Task Profile** option. Select the task profile you wish to use.

You can click the links at the bottom of this page to access other pages within this component.



For more information about Task reporting, see [Defining Task Reporting Requirements](#).

Define Template - Built Rules Page

Usage	Use this page to define or view what the rule will do (the condition and the action). The page name depends on which template you're using.
Object Name	TL_TEMPLATExxx_PNL, where, xxx represents the template number you are viewing.
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Template-Built Rules.
Prerequisites	None.
Access Requirements	Enter the Template Type, the name of the Rule Template, and the Rule ID. When in Add mode, the Rule Template page appears. Click the second tab to access the detail page described here.

Template Header					
Consecutive Days - CA Fixed					
Rule Template: TEMPLATE111	Rule ID: CA7DAY ca 7 day				
Explanation: When a Time Reporter worked 7 consecutive days in the state of California and reported time under TRC(s) (1) SPECIFIED_TRC_LIST in a given workweek, the first 8.0 hours worked on the seventh day will be paid as overtime (time and a half) under TRC (2)SPECIFIED_TRC1, while hours worked on the seventh day in excess of 8.0 will be paid as double-time under TRC (3)SPECIFIED_TRC2. Update Rule Text Modify Conditions					
<table border="1"> <thead> <tr> <th>Criteria (Conditions)</th> <th>Result (Action)</th> </tr> </thead> <tbody> <tr> <td> TRC List: View List </td> <td> Overtime TRC: KUCE2 Q *Create/Replace: Replace v Double Time TRC: KUCE3 Q </td> </tr> </tbody> </table>		Criteria (Conditions)	Result (Action)	TRC List: View List	Overtime TRC: KUCE2 Q *Create/Replace: Replace v Double Time TRC: KUCE3 Q
Criteria (Conditions)	Result (Action)				
TRC List: View List	Overtime TRC: KUCE2 Q *Create/Replace: Replace v Double Time TRC: KUCE3 Q				

TL Templatexxx page (where xxx represents the template number)

Rule Template

The rule template name that you entered on the entry dialog box displays here.

Rule ID

The rule ID that you entered on the entry dialog box displays here.

Explanation

The **Explanation** field explains what the rule will do when you run the Time Administration process. The description includes both a condition and an action. You will use the fields described below to enter a value for each item in the explanation that is numbered and appears in uppercase type.

Update Rule Text

Click the **Update Rule Text** button if you want to see the values you've entered on this page inserted in the explanation of the rule as it appears in the **Explanation** field.

Modify Conditions

This button is available once a template-built rule has been saved. It takes you to the Define Rule Header Page, which you can use to modify the conditional clause of the rule. This feature is designed for users who have a good understanding of SQL.

If you use the Define Rule Header Page page to modify the condition within a template-built rule, you can no longer view the rule or change its values on the Template-Built Rules component. All future changes must be made through the Define Rules page.

Criteria (Conditions)

Use the fields in this group box to define the exact conditions that must be met to trigger the rule. You will enter a value for each of the numbered variables in the conditional clause of the explanation. The conditional clause (also known as the *Where* clause in SQL), often begins with

if or *when*. For example, the conditional clause in Template360 (shown in the page shot) contains two variables labeled (1) and (2):

If an elapsed time reporter doesn't report time to TRC (1) **SPECIFIED_TRC** for (2) **SPECIFIED_DURATION** days, create (3) **SPECIFIED_HOURS** hours of TRC (4) **SPECIFIED_TRC**. This template can be used to compensate employees reporting elapsed time for perfect attendance.

Variable in "If" Clause	Enter Value in This Field
(1) SPECIFIED TRC	TRC or TRC List field
(2) SPECIFIED DURATION	Days



The fields that appear in the Criteria (Conditions) group box vary by template. All fields that can appear are described below and are listed in alphabetical order.

Conditional Operator

This field appears only when using a template type of Guaranteed Hours. You can select one of the following values:

- < less than
- <= less than or equal to
- = equal to
- > greater than
- >= greater than or equal to

Daily Threshold

This field appears only when using a Daily Threshold template. Enter the number of hours in the day over which the rule will be triggered. For example, if you want the rule to be applied when a person reports over 10 hours a day, enter **10** in this field. You can enter partial hours, in decimal format, in this field as well.

Day of the Week

Select the desired day of the week or enter the number that represents the day you want: Sunday = 1, Monday = 2, and so on.

Days

Enter a number of days in this field.

Duration

Enter a number of hours in this field. Use decimals for partial hours. For example, enter **.25** for 15 minutes.

Employee Type

Select the type of time reporter to which you wish to apply the condition. Valid values are **Exception Hourly**, **Hourly**, or **Salaried**. (This field applies to both employees and non-employees.)

Grace Minutes	This field appears only when using a Schedule Deviation template. Enter a grace period, in minutes, for punching in early.
Grace Minutes Late	This field appears only when using a Schedule Deviation template. Enter a grace period, in minutes, for punching in late.
Hours	Enter a number of hours in this field. Use decimals for partial hours.
Minutes	Enter a number of minutes in this field.
Number of Days	Enter a number of days.
Period End Date	Enter an end date.
Period Start Date	Enter a start date.
Period Threshold	Enter a number or hours, units or an amount, as applicable.
Premium Zone End	Enter a start time in this field.
Premium Zone Start	Enter an end time in this field.
Punch Type	Enter the punch type to which the condition applies. Valid entries are <i>Elapsed, In, Out, Meal, Break, Transfer</i> .
Punch Type List	This field works in conjunction with the Punch Type field. You select a punch type list that defines which punch types can follow the punch type selected in the Punch Type field. For example, a punch type list may specify that only Meal and Out punches can follow an In punch. Punch type lists are defined on the Define Values List page. Once you select a list, you can click the View List button to see the list of punch types included in the list.
Shift List	Select the appropriate shift list. Shift lists are defined on the Define Value List page. Once you select a list, you can click the View List button to see the shifts included in the list.
TRC	Select the time reporting code (TRC) the condition applies to. TRCs are defined on the TRC Setup page.
TRC List	If the condition applies to more than one TRC, select the TRC list that defines the set of TRCs. TRC lists are defined on the Define Values List page. Once you select a list, you can click the View List button to see which TRCs are included in the list.

Use Value List

Select the value list to which the condition applies. Value lists, such as shift lists, TRC lists, employee status lists, are defined on the Define Values List page and identify a predefined set of valid codes. You can define up to 15 different types of value lists.

View List button

The **View List** button is only available when the page contains an option for punch type list, shift list, TRC list, or use value list. It displays the contents of the selected list.

Result (Action)

Use the fields in this group box to define the action you want the system to take when the condition is met. You will enter a value for each of the numbered variables in the action clause of the explanation. For example, the action clause for Template360 (shown in the page shot) contains two variables labeled (3) and (4):

If an elapsed time reporter doesn't report time to TRC (1)SPECIFIED_TRC for (2)SPECIFIED_DURATION days, create (3)SPECIFIED_HOURS hours of TRC (4)SPECIFIED_TRC. This template can be used to compensate employees reporting elapsed time for perfect attendance.

<i>Variable in "If" Clause</i>	<i>Enter Value in this Field</i>
(3)SPECIFIED HOURS	Hours
(4)SPECIFIED TRC	Time Reporting Code



The fields that appear in the Result (Action) group box vary by template. All fields that can appear are described below and are listed in alphabetical order.

Doubletime TRC

Select the time reporting code for double-time pay. TRCs are defined on the TRC Setup page.

Exception ID

Select the type of exception you want the system to generate when the rule is executed. You define exception IDs on the Define Exception page.

Guaranteed Hours

Enter a number of hours.

Hours

Enter a number of hours in this field.

Overtime TRC

Select the time reporting code for overtime. TRCs are defined on the TRC Setup page.

Quantity

Enter the number of hours or units.

Rate	Enter a monetary amount in this field.
Shift List	Select the appropriate shift list. Shift lists are defined on the Define Value List page. Once you select a list, you can click the View List button to see the shifts included in the list.
Task Profile ID	Select the appropriate task profile ID. Task profiles are defined on the Task Profiles page.
TRC	Select the time reporting code (TRC). TRCs are defined on the TRC Setup page.
View List button	The View List button is only available when the page contains an option for punch type list, shift list, TRC list, or use value list. It displays the contents of the selected list.

You can click the links at the bottom of this page to access other pages within this component.

Template Descriptions

Following is a list of the rule templates delivered with PeopleSoft Time and Labor. They are presented alphabetically by template type. The variables you can enter are bold and italicized.

Template Type	Template Name	Description or Example	Rule
Approval Required	Template180	All time reported to specific TRC or TRC list will require manager approval prior to being paid.	All time reported to TRC(s) (1)SPECIFIED_TRC or (2)SPECIFIED_TRC_LIST will require manager approval prior to being paid. This template can be used to require approval for time reported to a specific TRC or list of TRCs, rather than requiring approval for an entire workgroup.

Attendance	Template 360	If TR doesn't report SICK for x number of days, create y hours of comp time.	If an elapsed time reporter doesn't report time to TRC (1)SPECIFIED_TRC for (2)SPECIFIED_DURATION days, create (3)SPECIFIED_HOURS hours of TRC (4)SPECIFIED_TRC. This template can be used to compensate employees reporting elapsed time for perfect attendance.
Attendance	Template360A	If TR doesn't report any attendance violations for x number of days, create y hours of a TRC.	If a punch time reporter doesn't record an attendance violation for (1)SPECIFIED_NUMBER_OF_DAYS days, then create (2)SPECIFIED_HOURS hours of TRC (3)SPECIFIED_TRC for perfect attendance compensation. This template can be used to compensate employees reporting punch time for perfect attendance.
Attendance	Template360B	If TR doesn't report any attendance violations or report SICK for x number of days, create y hours of a TRC.	If a time reporter doesn't report time to TRC (1)SPECIFIED_TRC for (2)SPECIFIED_DURATION days, create (3)SPECIFIED_HOURS hours of TRC (4)SPECIFIED_TRC. This template can be used to compensate employees reporting elapsed time or punch time for perfect attendance.
Consecutive Days	Template110	If TR works x consecutive days, then all hours on day x pay specific TRC.(replace)	When a time reporter reports more than (1)SPECIFIED_HOURS hours under TRC(s) (2)SPECIFIED_TRC_LIST in a day for

			(3)SPECIFIED_DURATION consecutive days, then all time reported for day (3)SPECIFIED_DURATION will be paid under TRC (4)SPECIFIED_TRC.
Consecutive Days	Template111	If TR works x consecutive days, then all hrs < 8 on 7 th day get paid specific TRC, while all hrs > 8 on 7 th day get paid another specified TRC. (California 7 Day Rule) (replace)	When a time reporter worked 7 consecutive days in the state of California and reported time under TRC(s) (1)SPECIFIED_TRC_LIST in a given workweek, the first 8.0 hours worked on the seventh day will be paid as overtime (time and a half) under TRC (2)SPECIFIED_TRC1, while hours worked on the seventh day in excess of 8.0 will be paid as double-time under TRC (3)SPECIFIED_TRC2.
Consecutive Days	Template120	If TR works x consecutive days, then all hours on days >= x pay specific TRC.(replace)	When a time reporter reports more than (1)SPECIFIED_HOURS hours in a day under TRC(s) (2)SPECIFIED_TRC_LIST for (3)SPECIFIED_DURATION consecutive days, then all time reported for day (3)SPECIFIED_DURATION will be paid under TRC (4)SPECIFIED_TRC.
Daily Threshold	Template010	Pay OT for all hours in a day > x.	When a time reporter reports time under TRC(s) (1)SPECIFIED_TRCs and the sum of hours is greater than (2)SPECIFIED_HOURS hours in a day, then all hours in excess of (2)SPECIFIED_HOURS will be paid under (3)SPECIFIED_TRC TRC.
Default	Template130	Replace all hours reported without a time reporting code to x.	This rule will assign any hours without a Time Reporting Code (TRC) to TRC (1)SPECIFIED_TRC.

Exception	Template140	If TR reports hrs > x, then create an exception.	Create exception (1)SPECIFIED_EXCEPTION when a Time Reporter reports more than (2)SPECIFIED_HOURS total hours of TRC(s) (3)SPECIFIED_TRC_LIST for a day. This template can be used to warn a manager as to when time reporters are reporting an excessive amount of hours
Exception	Template150	If TR reports x OT hours for a period then create an exception.	Create exception (1)SPECIFIED_EXCEPTION when a Time Reporter reports more than (2)SPECIFIED_HOURS total hours of (3)SPECIFIED_TRC_LIST during the rule period. This template could be used as a rule to warn that a time reporter is approaching overtime for the specified period.
Exception	Template210	If TR reports x minutes past scheduled start time, create exception.	When a time reporter punches IN more than (1)SPECIFIED_MINUTES minutes after their scheduled IN punch, generate exception (2)SPECIFIED_EXCEPTION_ID.
Exception	Template230	Create Exception when time is reported and the TR's status is in the following list ('Deceased', 'Terminated', 'Suspended',...)	Create exception (1)SPECIFIED_EXCEPTION_ID when time is reported and the employee status is in the following list (2)SPECIFIED_EMPLOYEE_STATUS_LIST.

Exception	Template240	Valid Punch types to follow a punch type.	When a Punch Type of (1)SPECIFIED_PUNCH_TYP E is followed by one of the following Punch Types (2)SPECIFIED_LIST_OF_PU NCH_TYPES, generate exception (3)SPECIFIED_EXCEPTION_ID. This rule is to help ensure that time reporters have reported their clock time in correct punch type sequence (eg. an IN punch must always follow an OUT punch, etc). This rule could work in conjunction with Exception Template 250.
Exception	Template250	Create exception if TR reports x minutes > threshold for specified PUNCH_TYPE.	When a time reporter reports more than (2)SPECIFIED_HOURS hours for the following punch types (3)SPECIFIED_PUNCH_TYP E, create exception (1)SPECIFIED_EXCEPTION . This rule is to help ensure that a time reporter has no missing punches. For example, if your time reporters would never have more than 10 hours associated to an IN punch (because of Meals, Breaks, etc), then create a rule that would create an exception when an IN punch > 10 hours.
Exception	Template280	If TR works x number of hours without a break create an exception.	When a time reporter works more than (1)SPECIFIED_DURATION hours without a break, create exception (2)SPECIFIED_EXCEPTION. This template can be used to inform managers if Time Reporters are working too many hours without a break.

Exception	Template300	Average hours per week threshold – Rolling.	When a time reporter reported time under TRC(s) (1)SPECIFIED_TRC_LIST more than (2)SPECIFIED_AVERAGE_HOURS hours per week during the last (3)SPECIFIED_NUMBER_OF_WEEKS weeks, create exception (4)SPECIFIED_EXCEPTION_ID. Template 300 expects to have a Weekly rolling period ID assigned (eg. First period is Week 1 through Week 10, Second period is Week 2 through Week 11, etc).
Exception	Template310	Average hours per week threshold – Fixed.	When a time reporter reported time under TRC(s) (1)SPECIFIED_TRC_LIST more than (2)SPECIFIED_AVERAGE_HOURS hours per week during the last (3)SPECIFIED_NUMBER_OF_WEEKS weeks, create exception (4)SPECIFIED_EXCEPTION_ID. Template 300 expects to have a weekly rolling period ID assigned (eg. First period is Week 1 through Week 10, Second period is Week 2 through Week 11, etc).

Exception	Template320	Night work limits.	When the average number of hours worked per day between (1)SPECIFIED_START_TIME and (2)SPECIFIED_END_TIME reported under TRC(s) (3)SPECIFIED_TRC_LIST is greater than (4)SPECIFIED_HOURS hours during the last (5)SPECIFIED_NUMBER_OF_WEEKS weeks, create exception (6)SPECIFIED_EXCEPTION_ID.
Exception	Template330	Weekly rest period.	When the number of hours for an uninterrupted rest period in a period is less than (1)SPECIFIED_HOURS hours, create exception (2)SPECIFIED_EXCEPTION_ID.
Exception	Template340	Daily rest period.	When the number of hours between shifts (daily rest period) is less than (1)SPECIFIED_HOURS hours, create exception 2)SPECIFIED_EXCEPTION_ID..
Exception	Template350	In-work rest period.	When a time reporter worked at least (1)SPECIFIED_HOURS hours per day and did not take at least a total of (2)SPECIFIED_MINUTES minutes break, then create exception (3)SPECIFIED_EXCEPTION_ID.

Exception	Template400	Minors may not work hours > 18 in a week or hours > 3 in a day when school is in session. Minors may not work hours > 40 in a week or hours > 8 in a day when school is not in session.	Create exception (1)SPECIFIED_EXCEPTION when minors between the ages of 14 and 16 work more than (2)SPECIFIED_HOURS hours in the period (3)SPECIFIED_PERIOD (day, week, month) and school is in/out of session between (4)SPECIFIED_DATE1 and (5)SPECIFIED_DATE2 . This is an FLSA rule for minors that can be used when school is both in and out of session. The period for the rule is defined on the template header screen. When using this template it is recommended that an 'In Session' rule and an 'Out of Session' rule be created and added to the rule program. This will provide the system with the school in session dates required to properly evaluate minors reported time. Note. This will have to be updated annually for traditional schools and possibly quarterly for year-round schools.
Exception	Template430	IF TR reports VAC on a day that is in a future period, create exception.	Create exception (1)SPECIFIED_EXCEPTION when a TR reports TRC(s) (2)SPECIFIED_TRC for a future period.
Guaranteed Hours	Template030	If TR reports hours on nonscheduled day, then they are guaranteed x number of hours.	When a time reporter reports hours to TRC(s) (1)SPECIFIED_TRCs on an unscheduled day, and the sum of reported hours is (2)SPECIFIED_OPERATOR

			(3)SPECIFIED_HOURS hours, then replace the reported number of hours with (4)SPECIFIED_HOURS hours. This template can be used for 'Guaranteed Hours' rules.
Guaranteed Hours	Template031	If TR reports a specific amount of hours to a specific TRC, then they are guaranteed x number of hours.	When a time reporter reports hours to TRC(s) (1)SPECIFIED_TRCs, and the sum of reported hours is (2)SPECIFIED_OPERATOR (3)SPECIFIED_HOURS hours, then replace the reported number of hours with (4)SPECIFIED_HOURS hours. This template could be used to pay a guaranteed number of hours to a time reporter.
Holiday	Template060	Pay all TRs HOL for a holiday.	Pay the following time reporters (1)SPECIFIED_EMPLOYEE_TYPE (2)SPECIFIED_HOURS hours of TRC (3)SPECIFIED_TRC for holiday pay. This template can be used to pay holiday pay to all time reporters.
Holiday	Template070	Pay HOL for a holiday only if TR worked day before and day after holiday.	Pay the following time reporters (1)SPECIFIED_EMPLOYEE_TYPE (2)SPECIFIED_HOURS hours of TRC (3)SPECIFIED_TRC for holiday pay if they work the day before AND the day after the holiday. This template can be used to pay holiday pay to all time reporters based on their attendance around the holiday.

Holiday	Template071	Pay HOL for a holiday only if TR worked the day before or day after holiday.	Pay the following time reporters (1)SPECIFIED_EMPLOYEE_TYPE (2)SPECIFIED_HOURS hours of TRC (3)SPECIFIED_TRC for holiday pay if they work the day before OR the day after the holiday. This template can be used to pay holiday pay to all time reporters based on their attendance around the holiday.
Holiday	Template080	If TR works on a holiday, create X pay premium for each hour reported.	When the following time reporters (1)SPECIFIED_EMPLOYEE_TYPE report hours on a holiday, pay an additional (2)SPECIFIED_HOURS hour(s) of TRC (3)SPECIFIED_TRC for premium pay, based on each hour reported to (4)TRC . This template can be used to pay a premium for hours worked to all time reporters who work on a holiday.
Holiday	Template420	Pay Part Time TRs x hours of holiday pay where x is = AVG (hours worked per day) for specified period.	Pay part-time time reporters the average hours worked per day during the specified period using TRC (1)SPECIFIED_TRC. The Period ID selected for this rule should have an end date that falls on the Holiday. For example, to pay Holiday pay for 1/1/2005 based on average hours worked for the past two months, the Period ID should be 11/1/2004 through 1/1/2005.

Meal	Template160	If TR works more than x number of hours, then deduct y hours for meal.	When a time reporter reports at least (1)SPECIFIED_HOURS hours in a day and no meal has been reported, create a (2)SPECIFIED_DURATION hour meal with TRC (3)SPECIFIED_TRC. The Punch Type of MEAL must be selected on the primary page for this rule to work properly. This template can be used for automatic meal deductions. If two auto-meal deduct rules are created for one Rule Program, only one will apply.
Missing Punch	Template260	Update Duration for specified PUNCH_TYPE with user specified duration.	When a time reporter reports more than (1)SPECIFIED_DURATION hours for a(n) (2)SPECIFIED_PUNCH_TYPE punch, then update time reported to (3)SPECIFIED_DURATION hours.
Missing Punch	Template270	Update Duration for specified PUNCH_TYPE with scheduled out punch	When a time reporter works more than (1)SPECIFIED_DURATION hours for a(n) (2)SPECIFIED_PUNCH_TYPE punch, then update time worked to Scheduled Hours.
Period Threshold	Template020	Pay OT for all hours in a week > x.	When a time reporter reports time under TRC(s) (1)SPECIFIED_TRCs and the sum of hours is greater than (2)SPECIFIED_HOURS hours in the specified period, then all hours in excess of (2)SPECIFIED_HOURS will be paid under (3)SPECIFIED_TRC TRC.

Period Threshold	Template021	Pay OT for all hours in a week > x to the day the TR worked OT.	When a time reporter reports more than (1)SPECIFIED_HOURS hours under TRC(s) (2)SPECIFIED_TRC_LIST in a specified period, then all daily reported time greater than daily scheduled time will be paid under TRC (3)SPECIFIED_TRC.
Premium Zone	Template100	If TR works between x and y o'clock, then pay premium.	When a time reporter works between (1)SPECIFIED_START_TIME and (2)SPECIFIED_END_TIME, create a shift premium for only those hours worked within the specified time, to be charged to TRC (3)SPECIFIED_TRC.
Premium Zone	Template090	If TR clocks in between x and y o'clock, then pay premium.	When a time reporter punches IN between (1)SPECIFIED_START_TIME and (2)SPECIFIED_END_TIME, create a shift premium for all hours worked, to be charged to TRC (3)SPECIFIED_TRC. If the time reporter punches IN between the specified timeframe, this rule will create a TRC for all hours worked, even when the time reporter punches OUT after the specified timeframe.
Schedule Deviation	Template050	If TR works outside of scheduled workweek, pay premium.	When a time reporter reports hours on an unscheduled day, replace all reported hours with TRC (1)SPECIFIED_TRC. This template can be used to pay a premium to employees for working outside of their regular work-week.

Schedule Deviation	Template290	If TR works shift other than home shift, then pay specific TRC.	When a time reporter reports hours to a shift that is not their home shift, and the hours are reported to TRCs (1)SPECIFIED_TRC_LIST, then replace all the hours worked that day to TRC (2)SPECIFIED_TRC. When the IN punch is more than (3)SPECIFIED_GRACE_EARLY minutes early or (4)SPECIFIED_GRACE_LATE minutes late, based on their assigned schedule, all hours for that day's shift will be assigned to TRC (2)SPECIFIED_TRC. The time reporter must also work at least the amount of hours scheduled for this rule to be enacted.
Shift	Template190	Create Premium if TR works specified shift.	When a time reporter is scheduled to work in one of the following shifts (1)SPECIFIED_SHIFTS, create a shift premium of (2)SPECIFIED_AMOUNT for each full hour worked with TRC (3)SPECIFIED_TRC.
Specific Day	Template040	If hours exist on a specific day, then replace all hours with another TRC.	When a time reporter reports hours that exceed (1)SPECIFIED_HOURS hours on (2)SPECIFIED_DAY, then replace the reported TRC with TRC (3)SPECIFIED_TRC.
Task	Template170	If TR reports time for a specific TRC, then change tasks to x	When a time reporter reports time under TRC (1)SPECIFIED_TRC, then charge time to task profile (2)SPECIFIED_TASK_PROFILE. This template can be used to change how time is charged when reporting a specific TRC.

Using Actions and Conditions to Create Rules

The Actions and Conditions component enables you to create actions and conditions that you can then assemble into rules. Because actions are defined independently of conditions, once you've defined the individual actions and conditions that make up a rule, you can combine them in new ways to create additional rules without having to engage in unnecessary or repetitive work. One advantage of using actions and conditions is that they do not require a complete mastery of SQL. The Actions and Conditions pages were designed to guide you through the steps required to create actions and conditions and will automatically generate all the SQL needed to define your rules.

Creating a Header for an Action

Just as in the case of template built rules, you will use two pages to define an action: the Action Header page, and an Action Detail page that's specific to the type of SQL action you are defining. On the Action Header page you'll specify the action you want to perform (delete, insert or update), and identify the Target Record (Table) you want to perform the action on. If your action type is insert (from another table), you'll also need to specify the Source Record (Table) from which the insert is taking place.

Action Header Page

Usage	Use the Action Header page to define or view general information for a SQL action.
Object Name	TL_ACTION_PNL1
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Actions, Action Header
Prerequisites	None.
Access Requirements	Enter an Action ID.

The screenshot shows the 'Action Header' page with the 'Action Detail' tab selected. The 'Action ID' is 'TMPLT160_A01'. The 'Description' field contains 'Insert into IPT2' and the 'Short Description' field contains 'Insert int'. The 'Action Type' is set to 'Insert' and the 'Core Component' checkbox is checked. The 'Target Record (Table) Name' is 'TL_IPT2' and the 'Source Record (Table) Name' is 'TL_IPT1'. The 'Insert Src Ind' is set to 'From Another Table'. There is an 'Explanation' section with an SQL icon.

Action Header page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.

Some fields on the Action Header page display constantly while others display only in connection with the **Action Type** of *Insert*. The following elements always display:

Action ID

This is the value you entered to access the page.

Action Type

Specify the SQL action you want to perform. Valid values are:

Update. Select *Update* if you want to change an existing row of data. You will then need to identify a table to update in the **Target Record (Table) Name** field (defined below). In addition, you'll need to define the type and source of the data you want to use to update the target record on the Action Details pages.

Delete. Select *Delete* if you want to delete the data in a table. You will then need to identify a table to delete in the **Target Record (Table) Name** field (defined below).

Insert. Select **Insert** if you want to insert a row of data into a table. You will then need to identify a table into which to insert data in the **Target Record (Table) Name** field, and the source of the data in the **Source Record (Table) Name** field (defined below). In addition, if your **Action Type** is **Insert**, you'll need to further define the data you want to insert into the target record using the Action Details pages.

Core Component

This field is display-only and system-maintained. Several SQL objects are created by PeopleSoft and delivered with the PeopleSoft Time and Labor product. These objects are used in templates. If the object you are viewing was created by PeopleSoft, the system selects this check box to signify that you did not build the object. If you created this object, the system clears this check box. That means you cannot modify or save this object, but you can copy it and modify the copy.

Target Record (Table) Name

Enter the record (table) you want to delete, update, or perform the insert on. The records contained in the prompt table are those you made available for deletion, insertion, or updating on the Working Tables page.

Explanation

Use this expression text box to explain the action you are defining.

The following fields display only if you select an **Action Type** of **Insert**:

Source Record (Table) Name

This is the source record (table) from which you are taking data to perform the insert.

Insert Src Ind. (Insert Source Indicator)

This field enables you to specify the exact source of the data used to perform the **Insert**. Valid values are:

From Another Table. If you enter **From Another Table** in the **Insert Src Ind. (Insert Source Indicator)** field, the **Source Record (Table) Name** field becomes available for data entry. You must then enter the source record from which you are taking data to perform the insert. You'll then need to go to the Action Details pages to specify the source of the data that you want to enter into the Target Record (Table) fields.

From a List of Values. If you enter *From a List of Values* in the **Insert Src Ind.** field, the **Source Record (Table) Name** field becomes unavailable for data entry. You'll only need to enter the **Target Record (Table) Name** into which you are inserting the list of values. To define the exact values you want to insert in each field contained in this record, you'll need to go to the Action Details pages.



Click this button to view the SQL text of the action you are creating.



Note. You can click the links at the bottom of this page to access other pages within this component.

Defining Action Details

If the **Action Type** on the Action Header page is *Update* or *Insert*, you must provide additional information about the fields in the target record (table) on which you are performing the action: for example, what fields are you updating or inserting data into? And what are the sources (and types) of data that you are using to perform the insert or update? The specific information you'll need to enter depends on the type of action you specified on the Action Header page, as well as the value you entered in the **Insert Src Ind** (Insert Source Indicator) field.

There are two pages on which you'll enter action details: the Action Details 1 and Action Details 2 pages. These pages work in combination with one another: when you select a value on the Action Details 1 page, related fields become available on the Action Details 2 page (as described below).



The Action Details pages are not available if your **Action Type** is *Delete*. Since you are deleting the contents of an entire record (table), you do not need to enter field level information on the Action Details pages.

Action Detail: Action Details 1 Page

Usage	Use the Action Detail 1 page to create the text of your SQL action.
Object Name	TL_ACTION_PNL2
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1,

	Define Actions, Action Detail
Prerequisites	None.
Access Requirements	Enter an Action ID.

The screenshot shows the 'Action Detail' page for 'Action ID: TMPLT160_A01' and 'Action Type: Insert'. The 'Action Details 1' tab is selected, displaying a table with the following data:

*Field Name	*Source Field Indicator
ACCT_CD	RecField
ACTIVITY_ID	RecField
BADGE_ID	RecField
BILLABLE_IND	RecField
BUSINESS_UNIT	RecField

Action Detail: Action Details 1 Page

Action ID

This is the ID you entered when you accessed the Action Header page. It uniquely identifies the action you are creating.

Action Type

This is the type of action you entered in the **Action Type** field on the Action Header page.



Click this button to view the SQL text of the action you are creating.

Field Name**1) If your Action Type is *Update*:**

Use this field to identify the precise fields in the Target Record (Table) that you want to update. You must then define the type and source of the data you want to use to perform the update in the **Source Field Indicator** field (defined below).

2) If your Action Type is *Insert (From a List of Values)*:

The **Field Name** column displays the fields belonging to the Target Record (Table) you identified on the Action Header page. These are the specific fields for which you are creating a new row. By default, if you are inserting

From A List of Values, the **Source Field Indicator** is set to **Constant**. You'll then need to enter the constant values you want to use for the insert action in the **Constant** field on the Action Details 2 page. However, you can override the default and select one of the following other options:

Expression

Meta-SQL

RuleTplt

State Var

Note. *RecField* is not available when you are inserting *From a List of Values*.

3) If your Action Type is *Insert (From Another Table)*:

The **Field Name** column displays the fields belonging to the Target Record (Table) you identified on the Action Header page. These are the specific fields for which you are creating a new row. By default, if you are inserting *From Another Table*, the **Source Field Indicator** is set to *RecField*. You'll then need to enter the RecFields you are using as the source of your insert in the **SRC (source) FieldName** column of the Action Details 2 page. However, you can override the default and select one of the following other options:

Constant

Expression

Meta-SQL

State Var

Source Field Indicator

1) If your Action Type is *Update*:

For each field in the Target Record (Table) that you update, you'll need to identify the type and source of the data you want to use to perform the update in the **Source Field Indicator** field. Valid values are:

Constant. If your **Source Field Indicator** is *Constant*, the **Constant** field on the Action Detail 2 page becomes available. You must then enter the constants you want to insert in the Target Record (Table) fields.

Expression Text. If your **Source Field Indicator** is **Expression**, the **Expression Text** field on the Action Detail 2 page becomes available. You can then create an expression text. For example, this could be a subquery that updates a row of data in the Target Record (Table).

Meta-SQL. If your **Source Field Indicator** is **Meta SQL**, the **Meta-SQL** field on the Action Detail 2 page becomes available. Enter the Meta SQL you want to use to update a field or a row of data in the Target Record (Table).

RecField. If your **Source Field Indicator** is **RecField**, the **SRC Field Name** field on the Action Detail 2 page becomes available. You can then enter another field from the Target Record (Table) to use as the source of the update (the source and target records are always the same when the action is **Update**). For example, if you are using one of the Intermediate Payable Time tables as both the source and target of your update, you could set the ORIG_TRC to TRC in a rule that changes the TRC.

State Variable. If your **Source Field Indicator** is **State Var**, the **State Variable** field on the Action Detail 2 page becomes available. You must then enter the state variable from any PeopleSoft Time and Labor state record that you want to use as the source of the update.

2) If your Action Type is *Insert (From a List of Values)*:

By default, if you are inserting *From A List of Values*, the **Source Field Indicator** is set to **Constant**. You'll then need to enter the constant values you want to use for the insert action in the **Constant** field on the Action Details 2 page. However, you can override the default and select one of the following other options:

Expression Text. If your **Source Field Indicator** is **Expression**, the **Expression Text** field on the Action Detail 2 page becomes available. You can then create an expression text. For example, this could be a subquery that generates data for the insert into the Target Record (Table).

Meta-SQL. If your **Source Field Indicator** is **Meta SQL**, the **Meta-SQL** field on the Action Detail 2 page becomes available. Enter the Meta SQL you want to use as the source of the insert into the Target Record (Table).

State Variable. If your **Source Field Indicator** is **State Var**, the **State Variable** field on the Action Detail 2 page becomes available. You must then enter the state variable from any Time and Labor state record that you want to use as the source of the insert.

Note. **RecField** is not available when you are inserting **From a List of Values**

3) If your Action Type is *Insert (From Another Table)*:

By default, if you are inserting **From Another Table**, the **Source Field Indicator** is set to **RecField**. You'll then need to enter the RecFields you are using as the source of the insert in the **SRC (source) FieldName** column on the Action Details 2 page. However, you can override the default and select one of the following other options:

Constant. If your **Source Field Indicator** is **Constant**, the **Constant** field on the Action Detail 2 page becomes available. Enter the constants you want to insert in the Target Record (Table) fields.

Expression Text. If your **Source Field Indicator** is **Expression**, the **Expression Text** field on the Action Detail 2 page becomes available. You can then create an expression text. For example, this could be a subquery that generates data for the insert.

Meta-SQL. If your **Source Field Indicator** is **Meta SQL**, the **Meta-SQL** field on the Action Detail 2 page becomes available. Enter the Meta SQL you want to use to insert data into the Target Record (Table).

State Variable. If your **Source Field Indicator** is **State Var**, the **State Variable** field on the Action Detail 2 page becomes available. You must then enter the state variable from any Time and Labor state record that you want to use as the source of the insert into the Target Record (Table).

Action Detail: Action Details 2 Page

Usage	Use the Action Detail 2 page to create the text of your SQL action.
Object Name	TL_ACTION_PNL2
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Actions, Action Detail
Prerequisites	None.

Access Requirements	Enter an Action ID.

The screenshot shows the 'Action Detail' page for Action ID: TMPLT160_A01. The Action Type is 'Insert'. Below the header, there are tabs for 'Action Details 1' and 'Action Details 2'. The 'Action Details 2' tab is active, displaying a table with three columns: 'Field Name', 'SRC FieldName', and 'Constant'. The table lists five fields: ACCT_CD, ACTIVITY_ID, BADGE_ID, BILLABLE_IND, and BUSINESS_UNIT. Each field has a search icon and a '+ -' button next to it. At the top right of the table, there is a 'View All' link and a pagination indicator '1-5 of 78'. A small 'SQL' icon is visible in the top right corner of the page.

Field Name	SRC FieldName	Constant
ACCT_CD	ACCT_CD	
ACTIVITY_ID	ACTIVITY_ID	
BADGE_ID	BADGE_ID	
BILLABLE_IND	BILLABLE_IND	
BUSINESS_UNIT	BUSINESS_UNIT	

Action Detail: Action Details 2 page

Action ID

This is the ID you entered when you accessed the Action Header page. It uniquely identifies the action you are creating.

Action Type

This is the type of action you entered in the **Action Type** field on the Action Header page.



Click this button to view the SQL text of the action you are creating.

Field Name

This column contains the fields in the Target Record (Table) that you are updating or performing the insert action on.

- If your action is **Update**, this column displays the same fields you entered in the **Field Name** column on the Action Details 1 page. These are the fields belonging to the Target Record (Table) that you have chosen to update.
- If your action is **Insert (From a List of Values)**, this column displays the Target Record (Table) fields on which you are performing the insert.
- If your action is **Insert (From Another Table)**, this column displays the Target Record (Table) fields on which you are performing the insert.

This page displays additional fields depending on the **Source Field Indicator** you selected on the Action Details 1 page:

<i>If the Source Field Indicator is...</i>	<i>...the following field or button displays on the Action Details 2 Page:</i>	<i>Use</i>
<i>Constant</i>	Constant	Enter the constant you want to use for the update or insert.
<i>Expression</i>	 (Expression Text button)	Click on the Expression Text button to access the Expression Text field.
<i>Meta SQL</i>	Meta-SQL Note. The page displays the following button in connection with the Meta-SQL field:  . Click on this button to set parameters within the Meta-SQL. 	Enter the Meta SQL you want to use for the insert or update action.
<i>Rec Field</i> (Record.Field) Note. <i>Rec Field</i> is only valid for the Action Types of <i>Update</i> and <i>Insert (From Another Record)</i> 	SRC FieldName (Source FieldName)	1) If your Action Type is <i>Update</i>, enter the fields in the Source Record (Table) that contain the data needed to perform the update. Note. In the case of an update, the Source Record (Table) is identical to the Target Record (Table) you identified on the Action Header page. 2) If your Action Type is <i>Insert (From Another Record)</i>, enter the fields belonging to the Source Record (Table) that you want to use as the source of the insert. The Source Record (Table) is the Source Record you identified earlier on the Action Header page.

<i>If the Source Field Indicator is...</i>	<i>...the following field or button displays on the Action Details 2 Page:</i>	<i>Use</i>
<i>State Var</i> (Variable)	State Variable	Enter the state variable from any Time and Labor state record that you want to use as the source of the update or insert.

Copy Actions

Use the Copy Actions page if you want to create an action that is similar--or identical--to one you have already created. First you duplicate the action by giving it a different name. Then you can (if you want) modify the action. Once this is done, you can combine the actions with other actions and conditions to form new rules.



You cannot modify individual actions or conditions once they are part of a rule and the system is in production (that is, once ***Production Environment*** is selected on the Installation Options page).

Copy Action Page

Usage	Use the Copy Actions page to copy an action.
Object Name	TL_TA_ACTN_CPY_CTL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy Action
Prerequisites	If you are not duplicating a PS-delivered action, you must create at least one SQL object.
Access Requirements	Enter a Run Control ID.

Copy Action page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Report List**, **Process Monitor**, **Process Request**.

Run Control ID	This field displays the value you entered to access the page.
Source Action ID	Select the action that you wish to copy. When you enter a value in this field, the system will display the appropriate Short Description for this action.
Target Action ID	Enter a name for the new/duplicate action.



After you have copied your action, use the Define Actions component (in correction mode) to modify the copy.

Defining a Condition Header

Just as in the case of SQL actions, you'll use two pages to define a condition: the Define Condition Header page, and a detail page that's specific to the type of condition you are defining. The Define Condition Header page is described below.

Define Condition Header Page

Usage	Use the Condition Header page to define or view general information for a SQL condition.
Object Name	TL_CONDITION1_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Conditions, Define Condition Header

Prerequisites	None.
Access Requirements	Enter a Condition ID.

Define Condition Header page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Short Description, Short Description.**



Template-built rules are not effective-dated, however they are associated with an effective-dated rule program.

Condition ID

This is the ID you entered to access the page. Every condition has a unique condition ID that identifies it to the system.

Core Component

This field is display-only and system-maintained. Many SQL objects are created by PeopleSoft and delivered with the PeopleSoft Time and Labor product. These objects are used in templates. If the object you are viewing was created by PeopleSoft, the system selects this check box to signify that you did not build the object. If you created this object, the system clears this check box. This means you cannot modify or save this object, but you can copy it and modify the copy.

Explanation

Use this expression text box to explain the condition you are defining.



Click this button to view the SQL text of the condition you are creating.

You can click the links at the bottom of this page to access other pages within this component.

Defining Condition Details

Once you have created a header for your condition, you must provide additional, detailed information about the condition you want to define. The specific information you'll need to enter depends on the type of condition you are creating.

Define Condition Detail Page

Usage	Use the Condition Detail page to create the text of your SQL condition.
Object Name	TL_CONDITION2_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Conditions, Define Condition Detail
Prerequisites	None.
Access Requirements	Enter a Condition ID.

Define Condition Header

Define Condition Detail

Condition ID: TMPLT_00_C20


Left Condition Expr Type

Recfield

Left Record (Table) Name

TL_TA_RUL_OVR

Left Aggr Func

Left Field Name

PUNCH_TYPE

*Conditional Operator

IN

*Right Condition Expr Type

Rule Tmplt

Define Condition Detail page

To define a condition on the Define Conditions page, you need to specify the exact *relationship* that must occur between two (or more) different elements before an action can take place. The action to be performed will take place only if the relationship you have defined is true. For example, you could specify that an action will take place only if a field equals (=) a certain value—for instance, you could decide that an action should take place only when a field equals a constant. Or you might decide that an action should take place only if a field value is greater than (>) another value you have defined. You'll specify the kinds of elements you want to compare (for example, a field value against a constant) in the **Left** and **Right Condition Expr (expression) Type** fields. You'll define the precise relationship that needs to occur between these elements (before an action can occur) in the **Conditional Operator** field.

The Define Conditions page contains several fields that display permanently, and others that display or hide depending on the **Left** and **Right Condition Expr (expression) Type** you select. The following fields always display:

Condition ID

This is the ID you entered to access the Define Condition Header page. It uniquely identifies the condition you are creating.



Click this button to view the SQL text of the condition you are creating.

Left Condition Expr Type (Expression Type)

This field is used to specify the type of element you want to compare to the element in the **Right Condition Expression Type** field in order to define your condition. You'll establish the correct relationship between these elements using the **Conditional Operators** field. Valid values are:

Constant

Expression

Meta-SQL

RecField

State Var (Variable)

Right Condition Expr Type (Expression Type)

This field is used to specify the type of element you want to compare to the element in the **Left Condition Expression Type** field in order to define your condition. You'll establish the correct relationship between these elements using the **Conditional Operators** field. Valid values are:

*Constant**Expression**Meta-SQL**RecField**State Var (Variable)***Conditional Operator**

This field always displays—regardless of the **Left or Right Expr Condition Type**. The **Conditional Operator** is what you use to define the relationship between the elements on the left and the right halves of the page. You can select one of the following values:

- < less than
- <= less than or equal to
- = equal to
- > greater than
- >= greater than or equal to

Depending on the values you enter in the **Left** and **Right Condition Expr Type** fields, the following additional fields display:

<i>If your Left or Right Expr Type is:</i>	<i>...then the following fields display:</i>
<i>Constant</i>	The Left or Right Constant field displays. Enter a constant to define your condition.
<i>Expression</i>	The Left or Right Condition Expr Type field appears. Enter an expression to define your condition. The expression text can be of any length.
<i>Meta SQL</i>	The Left or Right Meta SQL field appears. Enter the appropriate Meta-SQL to define your condition.

<i>If your Left or Right Expr Type is:</i>	<i>...then the following fields display:</i>
<i>Recfield</i>	If your Left or Right Condition Expr Type is <i>Recfield</i>, the following fields appear: 1) Left (or Right) Record (Table) Name. Enter the left or right record that you will use to define your condition. 2) Left (or Right) Aggr Func (aggregate function). The valid values for this field are: <i>Avg</i> (average) <i>Count</i> <i>Count (*)</i> <i>Max</i> <i>Min</i> <i>Sum</i> 3) Left (or Right) Field Name. Enter the name of the field belonging to the Left (or Right) Record (Table) Name.
<i>State Var</i>	The State Variable field appears. Enter the state variable you want to use to define your condition.

Copy Conditions

Use the Copy Conditions page if you want to define a condition that is similar—or identical—to one you have already created. First you duplicate the condition. Then you'll rename and (if you want) modify the condition. Once this is done, you can combine the condition with other actions and conditions to form new rules.



You cannot alter individual actions or conditions once they are part of a rule and the system is in production (that is, once ***Production Environment*** is selected on the Installation Options page).

Copy Condition Page

Usage	Use the Copy Conditions page to copy a condition.
Object Name	TL_TA_COND_COPY_CTL

Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy Conditions, Copy Condition
Prerequisites	If you are not duplicating a PS-delivered condition, you must create at least one condition.
Access Requirements	Enter a Run Control ID.

Copy Condition page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Report List, Process Monitor, Process Request.**

Run Control ID	This field displays the value you entered to access the page.
Source Condition ID	Select the condition that you wish to copy. When you enter a value in this field, the system will display the appropriate short description for this action.
Target Condition ID	Enter a name for the new/duplicate condition.

After you have copied your condition, use the Define Conditions component (in correction mode) to modify the copy.

Using SQL Objects

SQL objects are the most complex PeopleSoft Time and Labor rule objects that PeopleSoft delivers. You use them to create rules that are more complicated than templates or actions and conditions allow.

SQL objects are complete SQL statements that consist of an action and may consist of one or more conditions. They can include Select statements, Insert statements, table joins, and

subqueries. If you are comfortable writing free-form SQL statements, you can use an expression text box within the SQL object pages to enter and format your SQL statements. If you are not comfortable writing free-form SQL, the SQL object pages will guide you through each aspect of your action and condition.

If you are creating your own SQL statement, you can modify a PeopleSoft-delivered object using the Copy SQL Object page to create and modify a copy. Or, if you prefer, you can use the SQL Object component starting with the SQL Object page to build your statement.

We use the following example in discussing most pages in the SQL Object component. This SQL statement applies to the SQL Objects, Tables, Automatic Joins, Select Fields, and Where Expressions pages. It does not apply to the Expression Text, Insert, or Update pages.

```
INSERT INTO PS_TL_WRK02

    (DUR

    , EMPLID

    , TL_QUANTITY)

SELECT

    A.DUR

    , A.EMPLID

    , SUM(A.TL_QUANTITY) - %RuleTemplate()

FROM PS_TL_IPT1 A

    , PS_TL_WRK01 B

WHERE A.EMPLID = B.EMPLID

    AND A.DUR = B.DUR

    AND A.SEQ_NBR <= B.SEQ_NBR

    AND A.PUNCH_TYPE IN %RuleTemplate()

    AND A.TRC IN %RuleTemplate()

GROUP BY A.DUR, A.EMPLID

ORDER BY A.DUR, A.EMPLID
```



Important! PeopleSoft strongly recommends that you have adequate SQL training before attempting to use these pages. Use templates, actions, and conditions whenever possible.

Creating SQL Objects

For any SQL object you create, you designate a name, several descriptions, and the type of object you are building. Although there are eight pages in this component, you will see a maximum of five at any time. The pages that are visible depend on the type of SQL object you are building. Here are some questions you want to consider:

- What type of SQL statement do you want to create?
- What is the driver table for your statement?
- What is the result table for your SQL select statement?
- What name do you want to give the resulting SQL statement?
- What other tables do you want to join to your driver table?
- For each table added, how would you like to join this table to your driver table? Would you like to do this later?
- What fields do you want to select?
- What fields on your driver table do you want to update?
- Where clause — How do you want to determine the scope of the statement?

In our example, we want to create a select with insert statement. We select from TL_IPT1 and insert the results of the query into TL_TA_RESULTS. Entries on the SQL Object page will cover the following clause of our original example:

```
INSERT INTO PS_TL_WRK02
(
  DUR
  , EMPLID
  , TL_QUANTITY)
```

SQL Object Component

The SQL Object component morphs according to the type of SQL statement you are building. Use the following table to determine which pages are visible in each type of SQL statement.

<i>Statement Type</i>	<i>SQL Object</i>	<i>Tables</i>	<i>Automatic Joins</i>	<i>Select Fields</i>	<i>Where Exp.</i>	<i>Exp. Text</i>	<i>Insert Fields</i>	<i>Update Fields</i>
Delete	X				X			
Expression	X					X		
Insert	X						X	

Statement Type	SQL Object	Tables	Automatic Joins	Select Fields	Where Exp.	Exp. Text	Insert Fields	Update Fields
Select	X	X	X	X	X			
Update	X				X			X

SQL Object Page

Usage	Use the SQL Object page to select the type of action and create descriptions of SQL statement you are creating.
Object Name	TL_SQL_OBJECT_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, SQL Object
Prerequisites	None.
Access Requirements	Enter a SQL Object ID.

SQL Object page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**.



SQL objects are not effective-dated, but are associated with rules that are included in effective-dated rule programs.



For more information about Rule Programs, see Adding Rules to a Rule Program.

SQL Object ID

The system displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

SQL Type

Select the SQL action that this SQL object should perform. Valid options include:

Delete. Use this option if you want to create a delete statement. If you select this option, the component displays only the SQL Object and Where Expressions pages. If you are creating a delete to clear a table, we recommend creating a truncate action step on the Define Rule Steps page instead.

Expression. Use this option if you want to enter your own free-form SQL expression text. If you select this option, the component displays only the SQL Object and Expression Text pages.

Insert. Use this option if you want to create an insert statement. If you select this option, the component displays only the SQL Object and Insert Fields pages.

Select. Use this option if you want to create a select statement. You use a select statement to query. If you select this option, the component displays only the SQL Object, Tables, Automatic Joins, Select Fields, and Where Expressions pages. Also, If you select this option, the **Select Type** field appears.

Update. Use this option if you want to create an update statement. If you select this option, the component displays only the SQL Object, Update Fields, and Where Expressions pages.

Select Type

This field only appears if you chose **Select** in the **SQL Type** field. Select the type of action you wish to use. Valid options include: **State**, **Subquery**, **w/Insert**.

State. Use this option to select fields into a state record. A state variable is from the AE State records. You would use this option if you need to retrieve an exception description that will be used in multiple locations within your AE program, you will want to store the exception description in a state record so that you don't have to issue a SELECT every time you need it. A state record field is equivalent to a variable in a procedural language.

Subquery. Use this option if you want to use the select statement you are creating as a subquery in another query.

A subquery has to be bound to an outer query. PeopleSoft Time and Labor does not limit the number of nested subqueries, but your database platform might have constraints.

w/Insert. This option is like a SQL insert with select. It is only visible if Select is chosen.

Insert is used when you want to insert a list of values into a table. Select **w/insert** when you want to select fields from a source table to insert into a target table.

Record (Table) Name

This field appears if you selected **w/Insert** in the **Select Type** field. Chose the table against which your statement is made. The drop-down list box contains all tables loaded with the Working Tables page.

Core Component

This field is display-only and system-maintained. Several SQL objects are created by PeopleSoft and delivered with the PeopleSoft Time and Labor product. These objects are used in templates. If PeopleSoft created the object that you are viewing, the system selects this check box to signify that you did not build the object. If you created this object, the system clears this check box. This means that you cannot modify or save this object, but you can copy it and modify the copy.

Explanation

Enter a detailed description of this SQL Object.

You can click the links at the bottom of this page to access other pages within this component.

Expression Text

You use this page to enter free-form SQL text. Although we recommend that you try to create your SQL statement in the most readable fashion possible, you can use the Format SQL text button to reformat your SQL text.

Expression Text Page

Usage	Use the Expression Text page to enter free-form SQL text.
Object Name	TL_SQL_EXPRESS_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects
Prerequisites	You must complete the SQL Object page and select <i>Expression</i> in the SQL Type field.
Access Requirements	Enter a SQL Object ID.

SQL Object ID: ST_004_S02 Format Expression Text

Expression

```
INSERT INTO PS_TL_IPT2
SELECT
*
FROM PS_TL_IPT1
WHERE EXISTS (SELECT 'X'
FROM PS_TL_WRK22 A
WHERE A.EMPLID = PS_TL_IPT1.EMPLID
AND A.DUR = PS_TL_IPT1.DUR)
AND SEQ_NBR = (SELECT MIN(D.SEQ_NBR)
FROM PS_TL_IPT1 D
WHERE D.EMPLID = PS_TL_IPT1.EMPLID
AND D.EMPL_RCD = PS_TL_IPT1.EMPL_RCD
AND D.DUR = PS_TL_IPT1.DUR)
```

Expression Text page

SQL Object ID

This field displays the value you entered to access the page.

Format Expression Text button

Click this button to format the SQL text you enter in the Expression field. You must enter your statement before clicking the button.

Expression

This field is an expression text box in which you can type any SQL statements. You can also paste text from other applications. The system will store anything you enter and does not check for errors. Before entering your statement and saving the page, we recommend running your SQL statements through an interactive SQL tool.



For more information about rule methodology, see Rule Methodology.

Inserting Fields

You use this page to insert finite values into specific record-fields. You complete both the SQL Object and Insert Fields pages to create a complete Insert statement.

Insert Fields Page

Usage	Use the Insert Fields page to enter values in the record-field of a particular table.
Object Name	TL_SQL_INSERT_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects
Prerequisites	You must complete the SQL Object page and select <i>Insert</i> in the SQL Type field.
Access Requirements	Enter a SQL Object ID.

SQL Object Insert Fields

SQL Object ID: INSERT234

SQL

Field Name	Insert Value Source	Constant	State Variable
1 AUDIT_ACTN	Constant	"	
2 IN_PROCESS_FLG	Constant	"	
3 MSGNODENAME	Constant	"	
4 PROCESS_INSTANCE	Constant	0	
5 SUPERVISR_PIN_NUM	Constant	0	
6 TCD_ID	Constant	"	
7 TCD_NETWORK_ID	Constant	"	
8 TCD_NODE_ID	Constant	"	
9 TCD_SUPERVISR_ID	Constant	"	
10 TEST_CASE_ID	Constant	"	

+

Insert Fields page

SQL Object ID

This field displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

Field Name

Select the column in which you want to enter the value.

Insert Value Source

Select the source of the value. Valid values include:

Constant, Expression, Meta-SQL, Template, and Variable. The page morphs according to the option you select.

Constant

If you selected ***Constant*** in the Insert Value Source field, this field becomes available for entry. Enter a constant in this field.

State Variable

Enter the variable you would like to use. This field is only available for entry if you selected ***Variable*** in the **Insert Value Source** field.



Click this button to select a Meta-SQL option. The TL SQL Insert SecPNL page will appear.

For more information about Meta-SQL, see your PeopleTools PeopleBook.



Click this button to enter expression text. The Expression Text Sec Panel will appear.

You can click the links at the bottom of this page to access other pages within this component.

TL SQL Insert SecPNL

Usage	Use this page to enter Meta-SQL parameters.
Object Name	TL_SQL_INSMSQL_SEC
Navigation	Click Meta-SQL button on the Insert Fields page.

TL SQL Insert SecPNL

Meta-SQL

Select the Meta-SQL variable to include in your Insert statement.

Parameter 1, 2, and so on

Enter the data that the system should use to calculate the value of your Meta-SQL variable. For example, if you selected the Meta-SQL %DateDiff, you would enter the two dates between which system should calculate the difference.



For more information about Meta-SQL, see PeopleTools PeopleBook.

Expression Text Sec Panel

Usage	Use this page to enter expression text.
Object Name	TL_SQL_OBJ_SECPNL4
Navigation	Click Expression Text button on the Insert Fields page.

Expression Text Sec panel

You can enter expression text in box provided.

Update Fields

Use this component to update a specific record field. You can update a field with a constant, the result of a subquery, or other value. You can perform basic mathematical functions on this constant before the final update of the field.

```

UPDATE PS_TL_IPT1

SET TL_QUANTITY = TL_QUANTITY -

(SELECT DISTINCT A.TL_QUANTITY

FROM PS_TL_WRK02 A,

PS_TL_WRK01 B

WHERE A.EMPLID = B.EMPLID

AND A.DUR = B.DUR

AND A.EMPLID = PS_TL_IPT1.EMPLID

AND A.DUR = PS_TL_IPT1.DUR), TL_RULE_ID = %RuleTemplate()

WHERE PS_TL_IPT1.SEQ_NBR = (SELECT DISTINCT B.SEQ_NBR

FROM PS_TL_WRK01 B

WHERE B.EMPLID = PS_TL_IPT1.EMPLID

AND B.DUR = PS_TL_IPT1.DUR)

AND EXISTS (SELECT 'X'

FROM PS_INSTALLATION I

WHERE 'R' = %RuleTemplate())

```

Update Fields Page

Usage	Use the Update Fields page to update a record field.
Object Name	TL_SQL_UPDATE

Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, SQL Objects
Prerequisites	You must complete the SQL Object page and select <i>Update</i> in the SQL Type field.
Access Requirements	Enter a SQL Object ID.

Update Fields page

SQL Object ID

This field displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

Field Name

Select the record field that you wish to update. The result of your subquery or math operation will be placed in the field you specify.

Value Source(L)

Select the source of the value you want to act upon. Valid options include: ***Constant, Field, Meta-SQL, Subquery, Template, Variable.***

Field Name	Select the record field on which you want to base your calculation.
Math. Operator	If you wish to perform a mathematical function, select the operator. If you do not wish to perform any mathematical functions, select <i>(none)</i> . Valid options include: -, +, *, /.
Value Source(R)	Select the source of the value you want to act upon. Valid options include: <i>Constant, Field, Meta-SQL, Subquery, Template, Variable.</i>
Right SQL Object ID	This field is used to add a subquery to a Set clause.

Tables

On this page, you can designate which tables to include in your SQL object, aliases for your tables, and which effective date you wish to use.

In our example, TL_IPT1 is assigned an alias of “A” and TL_WRK01 is assigned an alias of “B.” The clause that is covered by this page is:

```
FROM PS_TL_IPT1 A
      , PS_TL_WRK01 B
```

Tables Page

Usage	Use the Tables page to designate which tables you will use in this SQL object.
Object Name	TL_SQL_OBJECT_TABLES
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, Tables
Prerequisites	You must complete the SQL Object page and select <i>Select</i> in the SQL Type field.
Access Requirements	Enter a SQL Object ID.

SQL Object ID: TMPL010_S12

Update Where Clause

Record (Table) Name	Table Alias - Correlation ID	Effdt Options	Conditional Operator	Effective Date Type
TL_IPT1	A	None		
TL_WRK01	B	None		

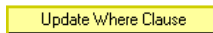
First 1-2 of 2 Last

+

Tables page

SQL Object ID

The system displays the value you entered to access the page.



Click this button to update the where clause of your SQL statement. The system will automatically generate SQL Where clause based on the Effective Date option chosen.



Click this button to view the SQL text of the SQL object you are creating.

Tables Grid**Record (Table) Name**

Select the name of the table that you wish to act upon.

Table Alias – Correlation ID

Select an alias for this table. An alias is used as another table name – generally shorter than the actual table name to save typing time.

Conditional Operator

This field is only available for entry if you are working with an effective-dated table and selecting an effective date option.

Effdt Options (effective date options)

This field provides predefined effective date logic to append to the join conditions. Valid values include: **First**, **Join**, **Last**, **None**.

First. Select this value if you want to select the first effective-dated row.

Join. If you select this option, the system will select the current dated row for this table.

Last. This option selects the last effective-dated row, even if that date is in the future.

None. If you select this value, the system will not use any effective date logic in the query.

Conditional Operator

This field is only available for entry if you are working with an effective-dated table and selecting an effective date option of *Join*.

Effective Date Type

Select either *Current* or *Expression*. If you select *Expression*, the system enables the Expression Text button.



Click this button to enter expression text. The Expression Text Secondary page will appear.

You can click the links at the bottom of this page to access other pages within this component.

Expression Text Secondary page

Usage	Use this page to enter expression text.
Object Name	TL_EXPRESN_SEC
Navigation	Click Expression Text button on the Tables page.



Expression Text page

You can enter expression text in box provided.

Automatic Joins

You can only create inner joins in PeopleSoft Time and Labor. You can join on any fields, either by custom-selecting or by selecting the key fields option.

Due to platform constraints, you cannot perform 3-way joins or unions using the Automatic Joins page, but you can make several selects into a working table and use the data from there. You can

also use the Expression Text page to write free-form SQL text that can include 3-way joins or unions.

We join the TL_IPT1 table to the TL_WRK_01 on the EMPLID and DUR columns in the following clauses:

```
WHERE A.EMPLID = B.EMPLID
```

```
AND A.DUR = B.DUR
```

Automatic Joins Page

Usage	Use the Automatic Joins page to join tables.
Object Name	TL_SQL_JOINS_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects
Prerequisites	You must complete the SQL Object and Tables pages and choose <i>Select</i> in the SQL Type field.
Access Requirements	Enter a SQL Object ID.

Automatic Joins page

SQL Object ID

This field displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

Left Table	Select (by alias) the first table in your join. Valid options include: <i>(none), A, B, C, D, E, F, G, H, I, J.</i>
Join Type	You can join in various ways. Valid options include: <i>Fields, Key Fields.</i> If you select <i>Fields</i>, you can select any record-fields in the five drop-down list boxes that appear. If you select <i>Key Fields</i>, you can select from the key fields that appear in the drop-down list box.
Right Table	Select (by alias) the second table in your join. Valid options include: <i>(none), A, B, C, D, E, F, G, H, I, J.</i>
SQL Join Text	This field displays the text of your join. The system uses the Meta-SQL construct %JOIN.

You can click the links at the bottom of this page to access other pages within this component.

Select Fields

You use the Select Fields page to create the Select statement of your SQL object. All the options that you would include in the text of the statement are available to you as field values.

Using this page, you can create the SQL text for this part of our example:

```
SELECT

    A.DUR

    , A.EMPLID

    , SUM(A.TL_QUANTITY) - %RuleTemplate()

GROUP BY A.DUR, A.EMPLID

ORDER BY A.DUR, A.EMPLID
```

Select Fields Page

Usage	Use the Select Fields page to create the first clause of your select statement.
Object Name	TL_SQL_SELECT_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects
Prerequisites	You must complete the SQL Object and Tables pages and select <i>Select</i>

	in the SQL Object Type field in the SQL Object page. The Automatic Joins page is optional.
Access Requirements	Enter a SQL Object ID.

SQL Object

Tables

Automatic Joins

Select Fields

Where Expressions

SQL Object ID: TEMPL010_S12

View All

First

1-2 of 2

Last

Corr ID	Record
A	SCH_SHIFT_DTL
B	TL_WRK01

SELECT ☐ Distinct? Group By: GROUP BY A.DUR,A.EMPLID

Seq Nbr	Source	Aggregate	Corr ID	Field Name	Order by	Field Name
1	Recfield		A	DUR_OFFSET	1	DUR
2	Recfield		A	EFFDT	2	EMPLID
4	Expression					TL_QUANTITY

Select Fields page

SQL Object ID

This field displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

Corr ID (correlation ID)

The system displays the **Corr ID** you selected for reference while you are creating your logical operator/where clause.

Record

The system displays the **Record** you selected for reference while you are creating your logical operator/where clause.

Distinct?	Select this check box if you wish to exclude duplicate results of the query. Selecting this check box is a method of using the SQL DISTINCT command. DISTINCT is not valid with some aggregates (COUNT(*), MIN, MAX), but is valid with COUNT if you specify columns.
Group By:	This value is automatically generated when there is an aggregate function.
Seq Nbr (sequence number)	Enter a sequence number for this row. The system will reorder all entries on this page according to this field.
Source	Select the source of the fields that you wish to include in this statement. The value you select in the Source field determines which other fields are visible. Valid options include: Constant. Select this value if you want to specify a constant. The Order by and Field Name fields appear on the page. Expression. Select this value if you want to enter expression text. The flashlight button appears on the page. Recfield. Select this value if you want to specify a record field. Statevar. Select this value if you want to specify a state variable. Template. Select this value if you want to specify a template.
Aggregate	If you wish to perform an aggregate function, select that option here. Valid options include: (none), AVG, COUNT, COUNT(*), MAX, MIN, SUM.
Corr ID (correlation ID)	Select the alias of the table you wish to specify for this Seq nbr.
Field Name	Select the column from which you wish to select.
Order by	This value is automatically generated by the system.
Field Name	Select the column from which you wish to select.

You can click the links at the bottom of this page to access other pages within this component.

Expression Text Sec Page

Usage	Use the Expression Text secondary page to enter expression text.
Object Name	TL_SQL_OBJ_SECPNL1
Navigation	Click the Expression Text button on the Select Tables page.

Expression Text:	SUM(A.TL_QUANTITY) - %RuleTemplate()

Expression Text Secondary Page

You can enter up to 254 characters in this expression text box.

Where Expressions

You use the Where Expressions page to create the Where clause of your SQL statement.

In our example, the statement is true where the Date Under Report is greater than or equal to itself.

```

AND A.SEQ_NBR <= B.SEQ_NBR

AND A.PUNCH_TYPE IN %RuleTemplate()

AND A.TRC IN %RuleTemplate()

```

Where Expressions Page

Usage	Use the Where Expressions page to create the where clause of your SQL statement.
Object Name	TL_SQL_WHERE_PNL
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, Where Clause
Prerequisites	You must complete the SQL Object, Tables, and Select Fields pages and select <i>Select</i> in the SQL Object Type field. The Automatic Joins page is optional.
Access Requirements	Enter a SQL Object ID.

Where Expressions page

The system displays the **Record** and **Corr ID** you have selected for reference while you are creating your Logical Operator/Where clause.

SQL Object ID

This field displays the value you entered to access the page.



Click this button to view the SQL text of the SQL object you are creating.

Logical Operator

Select an operator in this field. Valid values include: *(none), AND, HAVING, NONE, OR, WHERE.*

Use Conditional Prompts

Select this check box if you want to build the clause in the page instead of entering expression text for this clause. The system selects this check box automatically.

Expression Text

This field is 254 characters long, so only a small SQL expression or subquery can be entered into this field.

Left Expr Type

This field. Valid values include: *(none), Binding, Constant, Meta-SQL, Recfield, SubQuery, Template, Variable.*

If you select *Meta-SQL*, the %SQL button appears on the page.

Corr ID (correlation ID)

Select the alias of the table you wish to use. This field appears only when Recfield is selected for the Left Expr Type.

Left Field Name

Select a column name of the table that you wish to use for the left expression.



If you select Recfield, the f(x) button appears. Click the function button to see a list of aggregate functions. Valid values include: *NONE*, *MIN*, *MAX*, *AVG*, *SUM*, *COUNT*, *COUNT(*)*.

Operator

This field. Valid values include: *(none)*, *<*, *<=*, *<>*, *=*, *>*, *>=*, *EXISTS*, *IN*, *NOT EXIST*, *NOT IN*.

Right Expr Type

This field. Valid values include: *(none)*, *Binding*, *Constant*, *Meta-SQL*, *Recfield*, *SubQuery*, *Template*, *Variable*.

Corr ID (correlation ID)

Select the alias of the table you wish to use. This field appears only when Recfield is selected for the Right Expr Type.

Right Field Name

Select a column name of the table that you wish to use for the right expression.



Click the **Left/Right Binds** button to access the SQL Bind Mapping page, where you can enter data for a bind.

SQL Bind Mapping Page

Usage	Use the SQL Bind Mapping page to enter expression text.
Object Name	TL_SQL_BINDS_PNL
Navigation	Click the Left/Right Bind button on the Where Expressions page.

SQL Bind Mapping

SQL Object ID: TMPL010_820 Sequence: 1

View All First 1-2 of 2 Last

Bind Number	Description	Table Alias - Correlation ID	Record	Field Name
1	B.EMPLID	TL_IPT1		EMPLID
2	B.DUR	TL_IPT1		DUR

You must use the Bind option in some situations. For example, if you want to create a query that uses a subquery, you create the subquery first. As you create the subquery, you do not know in what table the field occurs (it could be an IPT table or another work record). Select the %Bind option. Once the subquery is added to another SQL object (the query that contains the subquery), click the Bind button and select the field.

For example, take date under report, join to dates table:

```
UPDATE TL_IPT1
```

```

SET TRC = 'OTSUN'

WHERE EXISTS (SELECT 'X' FROM TL_DATES_TBL A

WHERE A.DAY_OF_WK = '1'

AND A.DATE = TL_IPT1.DUR)

```

Copy SQL Objects

Use the Copy SQL Objects function if you want to create a SQL Object that is similar to one you have already created or a PeopleSoft-delivered SQL Object. First you duplicate a SQL Object by giving it a different name. Then you modify the new SQL Object. The copy function is similar to a Save As, and is performed when you save the page.



You cannot modify SQL objects once they are part of a rule and the system is in production (that is, once **Production Environment** is selected on the Installation Options page.

Copy SQL Object Page

Usage	Use the Copy SQL Objects page to copy a SQL object.
Object Name	TL_TA_COPY_CTL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy SQL Objects
Prerequisites	You must create at least one SQL object.
Access Requirements	Enter a SQL Object ID.

Copy SQL Object

Run Control ID: WSH
[Report Manager](#)
[Process Monitor](#)
Run

Source SQL Object ID: LCK_FR
Target SQL Object ID: K2LORI

Description:

Copy SQL Object page

Run Control ID

This field displays the value you entered to access the page.

Source SQL Object ID	Select the object that you wish to copy. When you enter a value in this field, the system will display the appropriate Description for this object.
Target SQL Object ID	Enter a name for the new object.

After you have copied your SQL object, use the SQL Object component (in Correction mode) to modify the copy. Remember that the component will morph according to the type of statement you are building.

User Exits

You can use user exits to add functionality to your PeopleSoft Time and Labor system. They are an additional/optional feature and their use is not required.

You can use user exits to add highly complex functionality to your Time and Labor system. With user exits, you can add PeopleCode and Application Engine sections to your regular Time and Labor processing.

When you write user exits, you need to add AE sections to the AE program TL_TA_RULES. You can use all the AE constructs supported by PeopleTools (SQL, PeopleCode, looping constructs like Do When, Do While, and so on).



If you create your own AE sections, they must have 8-character names. This is an Application Engine requirement.



Important! We strongly suggest you have adequate Application Engine and PeopleCode training before you attempt to create your own sections.



For more information about creating Application Engine sections, see Application Engine in your PeopleTools documentation.

Defining Attendance Programs

PeopleSoft Attendance Tracking is an optional feature that enables you to control time and administer attendance. You can track when punch-time reporters are late for work, leaving work early, or taking long lunches and breaks. The Attendance subfeature handles the tracking of punch-related attendance infractions so that you do not have to create Time Administration rules to track attendance. Although you could use the Time Administration rule engine to create similar attendance rules, it would be extremely cumbersome. This is a PeopleSoft-delivered set of rules that you can use if your business rules require attendance tracking.

Attendance tracking prevents a time reporter from taking advantage of your rounding rules. For example, suppose your organization rounds clock punches to the nearest quarter hour. If a time reporter takes advantage of rounding rules by clocking IN 'Late' and OUT 'Early' for every scheduled punch, this can result in paying the time reporter for almost 2.5 hours of nonwork time every week. Moreover, if you are paying overtime to this time reporter, the overtime rate will begin before the employee has worked 40 hours.

Attendance tracking compares [punch-time, scheduled time, attendance settings]. These infractions include *Tardies*, *Long Lunches*, *Early Outs*, and *Long Breaks*. The tracking can be tracked by three methods: Fixed Period, Rolling Period, and Step Period. The purpose for tracking punch-related infractions is to report user-defined recommended actions that are to be taken when thresholds are met. This type of tracking provides a history of time reporters' attendance habits. We store this history information even when the period changes.

You use a point system to weight the severity of each infraction. While taking a long break might be a minor infraction, arriving at work late and clocking out early at the end the day might be major infractions. When you have set up your recommended actions, the system automatically monitors a time reporter's behavior according the information from the TCD.

A time manager can override or cancel any action scheduled by the system, and you can change the settings of attendance tracking any time your business rules or union regulations change. Although the system is delivered with standard actions that you might want to take, you can also create your own actions.

Attendance processing occurs after IPT tables are loaded, but before rule are run.



For more information about processing, see Understanding Batch Processing in Time Administration.

Features of Attendance Tracking

The features of Attendance Tracking are:

- Tracks attendance based on punch-time.
- Tracks attendance by three methods: Fixed Period, Rolling Period, Step Period
- Provides points based attendance tracking.
- Provides delivered/user defined recommended actions.
- Reports on recommended actions.
- Reports perfect attendance.

Setting Up and Maintaining Attendance

Attendance allows you to define the attendance characteristics and to maintain the changes. When setting up, you will need to specify the following: tracking method, period ID, tracking items (tardies, long lunches, early outs, and long breaks), and points that associated with each tracking item. You will also need to define the recommended actions and threshold of each action. You can choose a recommended action from a predefined list of actions or create your own action. If you choose to create your own, choose *Other* and enter your comments to describe the action.

Tracking Methods

You can choose from three tracking method types: Fixed Period, Rolling Period, and Step Period. The following chart provides a description of each method:

Tracking Method	Description
Fixed Period	A fixed period is based on a period ID for a fixed period of time. Fixed period is commonly represented by month, quarter, semi-year, or year. Attendance is tracked for the duration of this fixed period and is reset at the start of the next fixed period. For example, if you track attendance on a monthly basis, a time reporter's attendance record is cleared at the beginning of each monthly period. The attendance infractions are retained in the TL_ATTEND_HIST table. You can view them with the View Attendance History page. Information for current and prior tracking periods is differentiated by the IN_PERIOD flag.
Rolling Period	Rolling period is based on the current date and the period of interest. You define a rolling period by specifying the length of days for your period of interest. The system subtracts the duration from the current date and uses the result as a start date. For example, if you define a rolling period of 90 days and the current date is 7/12/00, the system will track attendance from 4/16/00. It will compile all relevant attendance data to the present to determine if a time reporter's infractions require action. The next day, 7/13/00, the system will use data from 4/17/00 to the present date. It will ignore attendance data for 4/16/00 because this date is outside the period of interest.
Step Period	Step period is based on specified successive increments of time periods. You determine a series of periods of interest. Unlike the rolling period, the system uses the date, an action is triggered, not the current system date. When a time reporter's infractions trigger an action, the period of interest begins. If the time reporter does not reach another threshold in the period of interest, the attendance record is cleared and attendance tracking reverts to the first state/step. If another threshold is reached, a new step is invoked and a new period of interest applies. You define a step period by specifying steps of time. For example, if you define a step period as three steps and each step is equivalent to 30 days,

	then step one is 30 days, step two is 60 days, and step three is 90 days. Each time an employee violates a predefined threshold, a step period is incremented. If a time report currently is being tracked for a 30 day period and violates the attendance rule, the tracking period is extended to 60 days from the date of most current violation, not the original tracking time. If the time reporter violates the attendance rule a second time, it is extended to 90 days.

Attendance Program Page

Usage	Use the Attendance program page to specify infractions you would like to track, grace periods you allow, and the severity of each infraction.
Object Name	TL_ATTEND_PGM_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Attendance Programs
Prerequisites	None.
Access Requirements	Enter an Attendance Program.

Attendance Program Attendance Actions

Attendance Program: KUATTEND1

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Attendance Program 1 Short Description: Attend1

Attendance Tracking Detail

*Tracking Method: Fixed Time Period ID: PSMONTH

☒ Track Tardies Grace (Minutes): 5 Points: 1.00

☒ Track Long Lunch Grace (Minutes): 5 Points: 1.00 Meal Duration (Minutes): 60

☒ Track Early Out Grace (Minutes): 5 Points: 1.00

☒ Track Long Break Grace (Minutes): 5 Points: 1.00 Break Duration (Minutes): 15

Attendance Program page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, **Short Description**.

Attendance Program The system displays the value you entered to access the page here.

Attendance Tracking Detail Group Box

You use this group box to specify the particular rules/limits of your attendance program.

Tracking Method	Select type of time period you will use for this attendance program. Valid values include: <i>Fixed, Rolling, Step</i> . If you select <i>Fixed or Rolling</i> , the Time Period ID field appears. If you select <i>Step</i> , the Time Period ID field will be unavailable for entry.
Time Period ID	Select the time period ID that applies to your attendance program. You can select a period delivered by PeopleSoft or one that you have created. This field does not apply if you are creating a step-based attendance program.
For more information about Time Periods, see PeopleSoft 8 Time and Labor, "Setting Up Your Basic Tables".	
Track Tardies	Select this check box to track when time reporters clock in late to work at the beginning of a workday. The system compares the time of the first In punch of the workday with the scheduled punch time.
Grace (Minutes)	Enter the grace period (in whole minutes). You can enter a value from 1 to 99.
Points	Enter the value of this infraction. The value you enter can be up to 999 and can have up to two decimal places.
Track Long Lunch	Select this check box to track when time reporters take a long lunch. The system compares the duration of the meal punches with the meal duration that you enter on this page.
Meal Duration (Minutes)	Enter a maximum duration for a meal punch.
Track Early Out	Select this check box to track when time reporters clock out early from their workday. The system compares the time of the Out punch with the scheduled end of the workday.
Track Long Break	Select this check box to track when time reporters take a long break. The system compares the punch duration with the break duration that you enter on this page.
Break Duration	Enter a maximum duration for a meal punch.

Attendance Actions Page

Usage	Use the Attendance Actions page to specify which actions are taken

	when infractions are committed and when these actions are invoked.
Object Name	TL_ATTEND_ACT_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Attendance Programs, Attendance Actions
Prerequisites	This is the second page in a two-page component. You must complete the prior page.
Access Requirements	Enter an Attendance Program name.

Attendance Program: KUATTEND1

Attendance Action Detail View All First 1 of 1 Last

Effective Date: 01/01/1980

Description: Attendance Program 1 Short Description: Attend1

Action #	*Attendance Action	Points	Comment
1	Verbal 1		
2	Written 1		
3	Written 2		
4	Suspension		

+

Attendance Actions page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**, **Short Description**.

Attendance Program

The system displays the value you entered to access the page here.

Action

The system automatically populates this column with the next consecutive sequence number. Although the numbers are automatic, you can enter actions in any order. Lower-numbered items will occur first, so you enter the least-severe actions at the top of this list.

Note. The order in which you enter attendance actions is crucial to system accuracy and the integrity of your data. If you enter your actions in the wrong sequence, the system does not reorder or reprioritize them.

Attendance Action

Select the recommended action for this sequence number. Valid values include ***Letter, Other, Suspension, Terminate, Verbal 1, Written 1, Written 2, Written 3.***

Letters are placed on file without the employee's knowledge. Written warnings are signed by the employee and manager as an acknowledgement that the employee has been notified of the infraction. You can write an API to send a message when an action occurs, but the system only identifies infractions and displays the recommended action—it does not take any action. You cannot publish warnings or messages back to the TCD. The process will not progress if a manager excuses a step.

Points

Select when you want this action to occur. The system will invoke this action when the time reporter's total number of points for the current tracking period is equal to or greater than the value in this field. Your entry does not have to be a whole number—you can enter a three-digit number with up to two decimal places. The value entered must be a multiple of the highest point value on the Attendance Program page. This is to prevent recommended actions from being skipped.

Comment

This field is only available for entry if you selected ***Other*** in the **Attendance Action** field. Enter a description of or comment about the action that you want the system to take. You can create your own actions. For example, you might dock a time reporter's pay. This is a 30-character alphanumeric field.

Recommended Actions Page

Usage	Use the Recommended Actions page to view (by emplID) the action thresholds that a time reporter has crossed.
Object Name	TL_ATTENDANCE_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Inquire, View Attendance Actions
Prerequisites	You must complete the Attendance Programs and Attendance Actions pages.
Access Requirements	Enter an Empl ID.

Recommended Actions

EmplID: KC0003 Rogers,Cynthia A

Date Under Report	Description	Action Required	Date Cleared
01/27/2000	Late IN Punch	Written Warning 1	07/28/2000

Recommended Actions page

EmplID	The system displays the value you entered to access the page.
Date Under Report	This field displays the date that applies to this row of data.
Description	The system displays a description of the exception that occurred.
Action Required	The system displays the recommended action that you entered on the Attendance Actions page.
Date Cleared	This field displays the date that the time manager cleared the action.

Attendance History Page

Usage	Use the Attendance History page to view a time reporter's violation history.
Object Name	TL_ATTEND_HIST_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Inquire, View Attendance History
Prerequisites	You must complete the Attendance Programs and Attendance Actions page.
Access Requirements	Enter an EmplID.

Attendance History

EmplID: KC0003

Rogers,Cynthia A

Employee Attendance Violation History

View All

First

1-2 of 2

Last

Date Under Report	Description	In Period
01/13/2000	Late IN Punch	☒
01/27/2000	Late IN Punch	☒

Attendance History page

EmplID	This field displays the value you entered to access the page.
Date Under Report	This field displays the date that applies to this row of data.
Description	The system displays a description of the exception that occurred.
In Period	The system selects this check box if this row is in the current period. The system clears this check box for all history rows (archived data).

Assembling Your Rules from Actions and Conditions and SQL Objects

Once you have defined the individual building blocks that make up a rule using actions and conditions or SQL objects, you will need to combine these components into complete rules and place them in a logical order by arranging them into *rule steps*. Each rule can have one or multiple steps. You will organize and order the components of your rules using the following pages.

Standard Field Definitions for the Define Rules Component



Click the Compile Rule button to compile the SQL of your rule. The compile inserts the section and steps into the AE program/library.



Click the Rule SQL Text button to view the SQL text of the object you are creating. This field exists for rule headers and rules.

Define Rule Header Page

Usage	Use the Define Rule Header page to enter basic information about this rule.
Object Name	TL_RULE_PNL1
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Define Rules
Prerequisites	None.
Access Requirements	Enter a Rule ID.

Define Rule Header Define Rule Steps

Rule ID: KUAPPRVLREQ

*Description: TRC Approval Rule Short Description: TRC Aprvl

*Time Period ID: PSWEEK ☐ User Exit? AE Section: KUAPRVL

Compiled?: Y Last Compiled: 07/19/2000 10:04:47.720000AM ☐ Core Component

Explanation: All time reported to TRC(s) ('KUCT1', 'KUCT2', 'KUCT3', 'KUMLO', 'KUVAC') will require manager approval prior to being paid. This template can be used to require approval for time reported to a specific TRC or TRC's rather than requiring approval for entire workgroup population.

Define Rule Header page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description**, **Short Description**, **Rule Text button**.

Rule ID

This field reflects the value you entered to access the page.

Time Period ID

Select the time period of interest that applies to this rule. Valid values include the values delivered by PeopleSoft and any time periods that you have created using the Time Period pages. The system uses the time period to determine the date range for the selection criteria of the rule. The Time Administration program also uses the time period to determine which reported time to load into the working tables during processing.

For more information about how Time Administration uses time periods, see PeopleSoft 8 Time and Labor, “Understanding Batch Processing in Time Administration” and PeopleSoft 8 Time and Labor, “Setting Up Your Basic Tables”.

User Exit

Select this check box if the components of the rule are written in Application Engine or in PeopleCode. If you select this option, the **Compiled** and **Last Compiled** fields disappear from this page and the Define Rule Steps page disappears from the component. The system will look for the section you create in the TL_TA_RULES library.

You can create a user exit by creating a new AE Section within the TL_TA_RULES library. Also, you will need to add the AE section name to the AE section list on AE Section page.

AE (application engine) Section

Select the AE section that you want to use to process this rule. This section is inserted into TL_TA_RULES library when you compile the rule.

Note. Do not modify Time and Labor objects in the AE library. Use the Time and Labor pages.

Compiled?

The system defaults this field to 'N', which signifies whether the rule has been compiled. It is a system-maintained field that is changed to 'Y' if the rule has been compiled and hasn't been changed since.

Last Compiled

This system-maintained field displays the last date and time this rule was compiled.

Core Component

This field is display-only and is system-maintained. Many rules are created by PeopleSoft and delivered with PeopleSoft Time and Labor. These rules are used in rule templates. If the rule you are viewing was created by PeopleSoft, this field is set to *Y* to signify that you did not build it. If you created this object, the system sets this field to *N*. When you add a new rule, the system sets the Core Component flag to *N*.

Explanation

Enter a highly detailed description of your rule. You can include examples of how this rule is used and how it affects data in different scenarios.

Define Rule Steps

On the Define Rule Steps page, you define all the steps of your rule. Rules usually begin with steps to truncate working tables (TL_IPT2-5 and other working tables) to create spaces within the working tables for processing steps in your rule.



Never truncate TL_IPT1! Doing so will destroy your data.

Generally, you will order your rules by period. For example, if you have daily rules and weekly rules, you want the system to resolve the daily rules first.

Define Rule Header: Rule Step Details Page

Usage	Use the Define Rule Steps page to define the steps of your rule.
Object Name	TL_RULE_PNL2
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Define Rules, Rule Step Details
Prerequisites	This is the second page in a two-page component. You must first complete the Define Rule Header page.
Access Requirements	Enter a Rule ID.

The screenshot shows the 'Define Rule Steps' page. At the top, there's a 'Rule ID' field with the value 'KUAPPRVLREQ'. Below it is a table with columns 'Step', 'Step Type', and 'SQL Object ID'. The first row has '10' in the 'Step' column, 'SQL Obj' in the 'Step Type' column, and 'TMPL180_8' in the 'SQL Object ID' column. There are also buttons for '+', '-', and a search icon.

Define Rule Steps: Rule Step Details page

Rule ID This field displays the value you entered to access the page.

Rule Step Details

Use this grid to enter the steps of your rule.



For more information about how rule steps combine to form a rule, see Rule Methodology and Assembling Your Rules from Actions and Conditions and SQL Objects.

Step Enter a value in this column to determine the processing order of your rule steps. Lower numbers indicate higher priority. Numbers can be up to three digits and each number within this column must be unique. We suggest assigning numbers in increments of ten so that you can insert steps later without renumbering the entire rule. The processing order is extremely important because it can directly affect payable time calculations.

Step Type Select a value from the list. Valid values include:

(none) Select this option if you do not want the system to use any effective date logic.

SQL Obj. Select this option if you want to add a SQL object in this rule step. If you select this option, the Record (Table) Name column becomes unavailable for entry.

Action. Select this option if you want add an action in this rule step. If you select this option, the Record (Table) Name column becomes unavailable for entry.

Expr Text. Select this option if you want to add expression text in this rule step. If you select this option, the component changes and the Expression Text page is visible.

Truncate. Select this option if you want to truncate a table in this rule step. If you select this option, the SQL ID, Page Transfer, and Rule Step SQL Text button columns in the grid will become unavailable for entry.

SQL Object ID

Select the object that you wish to include in this rule step.

Action

Select the action that you wish to include in this rule step.



Click this button to view the details of the SQL object that you are adding to the rule step. You cannot modify the object.



To view the SQL text of the object you are adding to the rule, click the **Rule Text** button to access the Action SQL Text Resolution secondary page. You will not see the SQL text of other objects in your step list. To view the entire rule text, click the button at the top of the page.

Record (Table) Name

Select the table that you want to truncate, if applicable.

Define Rule Steps: Description Page

Usage	Use this page to enter descriptions for each rule step.
Object Name	TL_RULE_PNL2
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Define Rules, Description
Prerequisites	This is the second page in a two-page component. You must first complete the Define Rule Header page.
Access Requirements	Enter a Rule ID.

Define Rule Steps: Description page



All of the fields in the page above, except for the field below, have been documented in the Define Rule Header: Rule Step Details Page description.

Description Enter a short description of what this rule step should accomplish.

Rule SQL Text Resolution Page

Usage	Use the Rule Step Action SQL Text Resolution page to view the SQL text of the rule step you are adding to the rule. You will not see the SQL text of other objects in your step list. To view the entire rule text, click the rule text button at the top of the page.
Object Name	TL_RULE_TEXT_SP
Access Requirements	To access the secondary page, click the Rule Text button on the Define Rule Steps page.

Rule SQL Text Resolution

```

-- ***** Rule ID/Descr: KUAPPRVLREQ--TRC Approval Rule *****
-- AE STEP: 10 -----
-- SQL_ID: TMPL180_S01
-- Set Payable_Status to 'NA' on TL_IPT1.

UPDATE PS_TL_IPT1
  SET PAYABLE_STATUS = 'NA', TL_RULE_ID = %RuleTemplate()
 WHERE PS_TL_IPT1.TRC IN %RuleTemplate()
 AND EXISTS (SELECT 'X'
              FROM PS_TL_CALENDAR J
              WHERE J.PERIOD_ID = %RuleTemplate()
                 AND J.START_DT <= PS_TL_IPT1.DUR
                 AND J.END_DT >= PS_TL_IPT1.DUR)

```

Rule SQL Text Resolution page

Copy Rules

Use the Copy Rules function to create a rule that is similar to one you have already created or a PeopleSoft-delivered rule object. First you duplicate a rule by giving it a different name. Then modify the new rule. The copy function is similar to a Save As, and is performed when you save the page.

Copy Rule Page

Usage	Use the Copy Rules page to copy rules.
Object Name	TL_RULE_COPY
Navigation	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Copy Rules
Prerequisites	None.
Access Requirements	Enter a Run Control ID.

Copy Rule page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Report List, Process Monitor, Process Request, Description.**

Run Control ID	This field displays the value you entered to access the page.
Source TL Rule ID	Select the rule that you wish to copy.
Target TL Rule ID	Enter a name for the new/duplicate rule.

After you have copied your rule, use the Define Rule Header page to modify the copy.

Adding Rules to a Rule Program

After you organize the components of your rules in the proper order to create a fully formed rule, you need to add your rules to a rule program using the Rule Program and Program Detail pages. The rule program specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules. For example, you might want to group all rules for salaried time reporters into a single rule program. Then you would assign this rule program to every work group containing only salaried employees. Rules programs are also the method by which you assign attendance programs to time reporters.

Modifying Rule Programs

Rule programs are effective-dated; but the individual rules contained within them are not. You cannot modify a rule once you assign it to a rule program. However, you can remove the rule from the rule program and replace it, if appropriate, with a new rule. This feature ensures the referential integrity of rules processing.

Program Page

Usage	Use the Program page to assign an attendance program to a work group and to enter a description of the rule program.
Object Name	TL_RULE_PGM_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup1, Rule Programs
Prerequisites	None.
Access Requirements	Enter the Rule Program ID.

Program **Program Detail**

Rule Program ID: KURULEPGM1

View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Description: Rule Program w/ Attendance 1 Short Description: Rule Pgm1

Attendance Program: KUATTEND3 Attendance Program 3

Description: Created On: 6-6-00
Weekly Overtime Rule Only

Program page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Description, Short Description.**

Rule Program ID

This field displays the rule program ID you entered to access the page.

Attendance Program

Select the attendance program you want to associate with this rule program, if applicable. Attendance programs contain rules that track various attendance issues.

For more information about Attendance programs, see [Defining Attendance Programs](#).

Description Enter a complete description of the rule program in this field.

Program Detail Page

Usage	Use the Program Detail page to select the rules to be included in the program and the order in which the Time Administration program should execute them.
Object Name	TL_RULE_PGMDTL_PNL
Navigation	Go, Define Business Rules, Define Time and Labor Rules, Setup1, Rule Program Detail
Prerequisites	This is the second page of a two-page component.
Access Requirements	Enter the Rule Program ID.

Program

Program Detail

Rule Program ID: KURULEPGM1

View All First 1 of 1 Last

Effective Date: 01/01/1980

Description: Rule Program w/ Attendance 1

View All First 1-2 of 2 Last

Priority	Rule ID	Description	View Rule Description
10	KUDFLTREG	Default Reg TRC	View Rule Description
20	KUSUNOT	Sunday Overtime Rule	View Rule Description

Program Detail page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Description**.



Column order for grids may vary by implementation. All columns may not be visible. Use the page's horizontal scroll bar as necessary to view all the available columns.

Rule Program ID

This field displays the rule program ID you entered to access the page.

Priority

You must assign a sequence number to each rule to specify its processing order. The lower the number, the higher the priority. Numbers can be up to three digits and each number within the program must be unique. It's a good idea to assign numbers in increments of ten or some other factor. If you do this, you will not need to renumber everything if you must insert a row later.

The processing order is extremely important as it can directly affect payable time calculations. In general, rules with a shorter time period should be processed first. For example, assign daily rules a lower number than weekly and monthly rules. You should also place rules that consider thresholds (such as overtime rules) and rules that use default TRCs after those that resolve regular hours and defaults.

For example, a rule created with Template440 should always be placed at the beginning of a rule program because other rules may need to act on the scheduled IN punch time. This rule says: "If a time reporter clocks in outside of normal schedule, assign schedule with the closest start time to the time reporter's IN punch."

Note. This field triggers Referential Integrity. RI ensures that if a time reporter's Earliest Change Date is less than the effective dated change of the setup table, the Earliest Change Date will not be updated. If, however, the Earliest Change Date is null or greater than the effective date of the setup table change, the Earliest Change Date will be updated to the minimum effective date of Reported or Payable Time for the time reporter.

Rule ID

Select the rule you want to include in the program.

Note. This field triggers Referential Integrity. RI ensures that if a time reporter's Earliest Change Date is less than the effective dated change of the setup table, the Earliest Change Date will not be updated. If, however, the Earliest Change Date is null or greater than the effective date of the setup table change, the Earliest Change Date will be updated to the minimum effective date of Reported or Payable Time for the time reporter.

Description

The description of the rule you selected in the **Rule ID** field is displayed here for your reference

View Rule Description

Click the View Rule Description link to see the full text description of the rule.

CHAPTER 11

Understanding Batch Processing in Time Administration

The batch process in Time Administration converts reported and scheduled time into payable time. It executes the rules you defined using Time and Labor's online tools for rule creation, selects time reporters for processing, combines time reporters into batches, determines the period to process, and calculates prior period adjustments before passing time reporter data to your Payroll system or other applications. The following section presents detailed information about each step in the batch process.

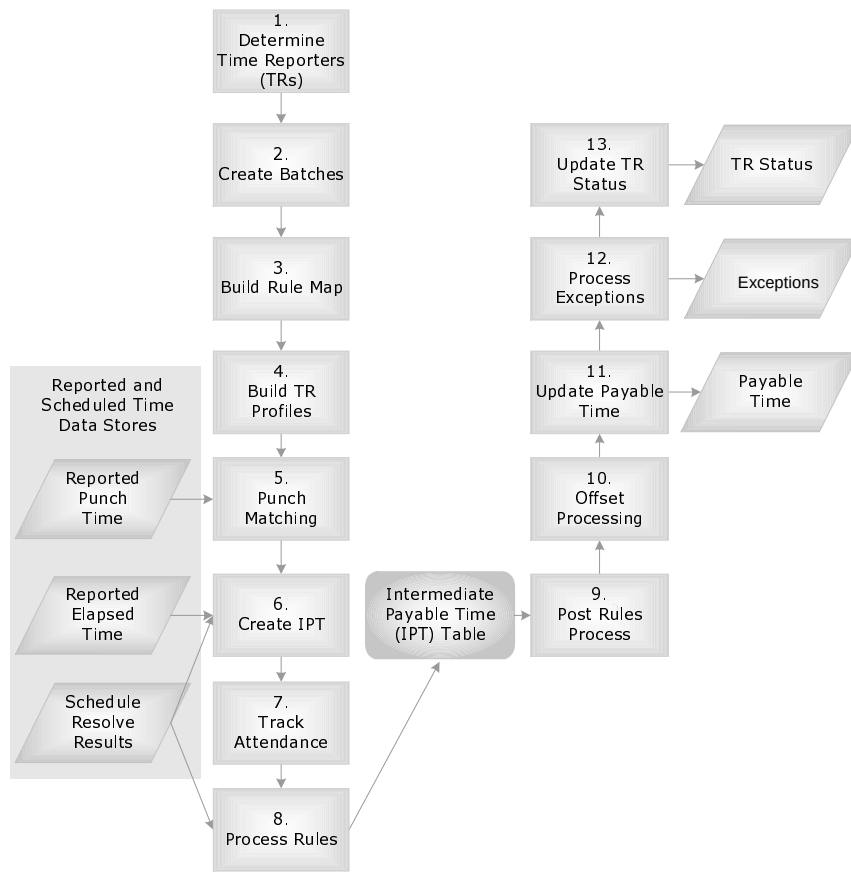
General Processing Information

The Time Administration batch process consists of a series of programs created with a development tool called the Application Engine. You can locate these programs in Application Designer by selecting **Open** from the **File** menu to display the **Open Object** dialog box. Next select **App Engine Program** in the **Object Type** field, and then enter the prefix **TL_TA** in the **Name** field. TL_TIMEADMIN is the main driver. Time Administration includes all the programs between TL_TA000200 and TL_TA0001300.



For more information about Application Engine and the Application Designer, see your PeopleTools PeopleBook.

These individual Application Engine programs are joined together as illustrated in the following process flow diagram:



Time Administration process flow

During a Time Administration Batch run, the system calls each program in the order indicated in the process flow diagram, beginning with the Determine Time Reporters program. You can go directly to the documentation for these programs by clicking on each of the steps in the Function column:

Program Name (Technical)	Function
TL_TA000200	Step 1: Determine Time Reporters to Process
TL_TA000300	Step 2: Combine Time Reporters into Batches
TL_TA000400	Step 3: Build Rule Map
TL_TA000500	Step 4: Build Time Reporter Profiles
TL_TA000600	Step 5: Punch Matching
TL_TA000700	Step 6: Create Intermediate Payable Time
TL_TA000750	Step 7: Track Attendance
TL_TA000800	Step 8: Process Rules
TL_TA000900	Step 9: Perform Post-Rules Processing
TL_TA001000	Step 10: Process Adjustments

Program Name (Technical)	Function
TL_TA001100	Step 11: Update Payable Time
TL_TA001200	Step 12: Process Exceptions
TL_TA001300	Step 13: Update TR Status

Step 1 - Determine Time Reporters to Process

This process can be divided into two distinct phases.

Phase 1: Select Time Reporters for Processing

To process time reporters, you must first select the groups or individuals you want to process on the Time Administration run control page. Time Administration then narrows down the population of time reporters to be processed to those who meet the following selection criteria:

If you are creating Payable Time, the system will only process time reporters whose TA_STATUS is Y and whose EARLIEST_CHGDT is less than or equal to the system date (or process date) specified on the Time Administration run control page.

Note. If you are forecasting Payable Time, the system does not use TA_STATUS or EARLIEST_CHGDT to select time reporters for processing. The only time it uses these fields to select time reporters is when creating actual Payable Time.

For more information about how the system selects time reporters when forecasting Payable Time, see *Launching the Time Administration Process*.

Once the system has applied its selection criteria to the time reporters you have entered on the Time Administration run control page, Time Administration populates the TL_TA_TRLIST table with a final list of time reporters to be processed (it only processes time reporters in this list).

Note. Even though TA_STATUS is permanently set to “Y” for exception reporters, Time Administration does not automatically process all exception reporters. Only exception reporters whose EARLIEST_CHGDT is less than or equal to the system date selected on the Time Administration Run Control page will be processed.

Phase 2: Define Initial Period of Interest

This step determines the start (START_DT) and end dates (END_DT) of the “initial period of interest” for batch processing.

The “initial period of interest” represents the minimum amount of time that needs to be processed for each time reporter you run through Time Administration. This data is stored in the TL_TA_TRLIST table along with each time reporter’s EMPLID and EMPL_RCD. Regardless of whether you are creating Payable Time or Forecasting Payable Time, the initial period of interest is defined (for each time reporter) as the workgroup period intersected by the EARLIEST_CHGDT. The end date of this period can extend beyond the workgroup period (as far out as the last date of reported time) if time is reported for future dates (that is, dates following the workgroup period).

The initial period of interest start (START_DT) and end (END_DT) dates contained in the TL_TA_TRLIST table are referenced in Step 2—Combine Time Reporters into Batches, and are used to help group the population you are processing into batches.

For more information about workgroups and workgroup periods, see PeopleSoft 8 Time and Labor, “Establishing Workgroups” and PeopleSoft 8 Time and Labor, “Setting Up Your Basic Tables”.

In this section we’ll first discuss how the system uses the TA_STATUS and EARLIEST_CHGDT fields to narrow down the population of time reporters you’ve entered on the Time Administration run control page to those who actually meet the criteria for processing. Then we’ll present information on the TL_TA_TRLIST table, which contains the final list of time reporters for processing and the start and end dates of the “initial period of interest”—information that will later be used in Step 2—Combine Time Reporters Into Batches.

Understanding Time Reporter Status

To understand how the system selects time reporters for processing, you first need to know how the application uses the TA_STATUS and EARLIEST_CHGDT fields on the TL_TR_STATUS table. This table stores information about who is eligible for processing and what the earliest addition or update to time-related data is for each time reporter since the last Time Administration run. The structure of this table is illustrated below:



For more information about how the system selects time reporters when forecasting Payable Time, see Launching the Time Administration Process.

TL_TR_STATUS Record

Field Name	Description
EMPLID	The time reporter's employee ID number.
EMPL_RCD	The time reporter's employee record number.
TA_STATUS	Indicates whether the time reporter should be run through Time Administration. Valid values are <i>Y</i> (the time reporter should be run) and <i>N</i> (the time reporter should not be run).
EARLIEST_CHGDT	The date-under-report of the earliest addition or update to time-related data for a time reporter since the last Time Administration run. The earliest change date helps determine both the range of dates and the amount of data that will be processed for each time reporter.
LASTUPDDTTM	A timestamp indicating when the last transaction affecting a time reporter's payable time has been entered. Note that this is the <i>time</i> the transaction occurred—not the <i>date under report (DUR)</i> .



When forecasting Payable Time, the system does not check TA_STATUS. It also uses the date you enter in the **Process Period with this Date** field on the Process Time Admin Page as the EARLIEST_CHGDT for all selected time reporters.

The fields in the TL_TR_STATUS table are updated at different times and for different reasons:

Updating TL_TR_STATUS When There Are New Enrollments

When a time reporter is enrolled in Time and Labor, the system inserts a new row in the TL_TR_STATUS record.

- For newly hired positive time reporters, the system sets TA_STATUS to *N* and EARLIEST_CHGDT to null.
- For newly hired exception reporters, the system sets TA_STATUS to *Y* and the EARLIEST_CHGDT to the date entered as the Payable Time Start Date on the Create Time Reporter Data page. If this date field is not completed, then the EARLIEST_CHGDT will be set to the TL enrollment date.

Updating TL_TR_STATUS When There Is New or Modified Data

In the case of positive time reporters, when data is changed or new data is added that might affect payable time, TA_STATUS is set to *Y* (if it was previously set to *N*) and the

EARLIEST_CHGDT is set to reflect the earliest date for which new time was reported or the earliest date for which existing time data was modified—even if the modification extends into prior periods.

In the case of exception time reporters, TA_STATUS always equals Y, and the EARLIEST_CHGDT is automatically reset, after processing, to the first day of the next workgroup period (this is the period immediately following the one intersected by the system date or process date used in the current Time Administration run). This enables the system to know which period to process in the subsequent run (the period to be processed is the one intersected by the earliest change date).



Note. Once a time reporter has been processed, the time reporter will not be reprocessed unless new data is entered that causes the EARLIEST_CHGT field to be reset in the period that was just processed or in a prior period.

There are three sources of new or modified data that can cause the TL_TR_STATUS record to be updated:

- Weekly reporting pages (for punch and elapsed time) can cause the EARLIEST_CHGDT to be set to the earliest date of reported time and the TA_STATUS to be set to Y.
- Batch time entered through the TCD Interface, Rapid Time pages, or Mass Time pages goes through Submit Time and launches the Validation process, which causes TL_TR_STATUS to be updated.
- Changes to effective-dated rows of information using the online system trigger Referential Integrity and launch the Validation process. The Validation process updates TL_TR_STATUS.



The Validation process resets the EARLIEST_CHGDT to reflect retroactive changes in data. If a time reporter is affected by these changes, but does not have data going back as far as the earliest change date, the system recognizes this and sets the EARLIEST_CHGDT to coincide with the first actual instance of reported or scheduled time. For example, suppose that employee A has time data going back to 5 January 1998. This is also the day he joined Workgroup A. Now suppose that the Time and Labor administrator finds that all time reporters in Workgroup A should have been in Workgroup B beginning on 1 January 1995. Because time reporter A only has time date going back to 5 January 1998, his earliest change date will be set to 5 January 1998.

Resetting TL_TR_STATUS at the End of a Time Administration Run

At the end of a Time Administration run, the system resets the values in the TL_TR_STATUS record as described in Step 13-Update TR Status.

Updating Status as a Result of a Processing Exception

When an exception of high or medium severity is generated (one that prevents a time reporter from being fully processed), the time reporter's TA_STATUS and EARLIEST_CHGDT will not be reset in the usual way. Instead, TA_STATUS will remain "Y" and the EARLIEST_CHGDT will be changed to the earliest Exception date, so that the time reporter can be processed again once the exception is resolved. For example, let's say that time is originally reported for 1 September 2000 through 15 September 2000, where TA_STATUS = Y and EARLIEST_CHGDT = 1 September 2000. After Time Administration is run, an exception is created for 9 September 2000. TA_STATUS will remain "Y" and EARLIEST_CHGDT will be reset from 1 September to 9 September.



For more information about exceptions, see Establishing Exceptions and Defining Validation Criteria.

Using TA_STATUS and EARLIEST_CHGDT to Select Time Reporters for Processing

As noted earlier, the system will only process time reporters whose TA_STATUS is Y and whose EARLIEST_CHGDT is less than or equal to the system date specified on the TA Run Control page. You will set the system date to either the current date or another date (the process date) depending on who you want to process and what period(s) you want to process.



Even though TA_STATUS is permanently set to "Y" for exception reporters, Time Administration does not automatically process all exception reporters. Only exception reporters whose EARLIEST_CHGDT is less than or equal to the system date selected on the Time Administration Run Control page will be processed.

Defining the Initial Period of Interest



Important! The following explanation of the initial period of interest assumes that the Use Reported Time for POI check box on the Process Time Admin page is selected. For an explanation of what happens when the check box is cleared, see Process Time Admin page.

Once you have specified the population you want to process, Time Administration determines the start (START_DT) and end dates (END_DT) of the "initial period of interest" for batch creation. This "initial" period represents the minimum amount of time that needs to be processed for each time reporter you run through Time Administration. This data is stored in the TL_TA_TRLIST table along with each time reporter's EMPLID and EMPL_RCD.



The initial period of interest start (START_DT) and end (END_DT) dates contained in the TL_TA_TRLIST table are referenced in Step 2—Combine Time Reporters into Batches, and are used to help group the population you are processing into batches.

The TL_TA_TRLIST table has the following structure:

TL_TA_TRLIST Table

Field	Use
BATCH_NUM	This number represents the initial assignment of time reporters to a batch for processing. However, a single time reporter may later be processed in more than a single batch depending on their workgroup affiliation or their time as well as If the period of time to be processed for the time reporters in a workgroup spans more than one month,
EMPLID	Identifies the time reporter to be processed.
EMPL_RCD	Identifies a specific job or position.
START_DT	This is the start of the Initial Period of Interest.
END_DT	This is the end of the Initial Period of Interest.
EARLIEST_CHGDT	This is the earliest date of reported time for the time reporter.
RUN_CNTL_ID	This is the run control ID entered on the run control page for Time Administration processing.

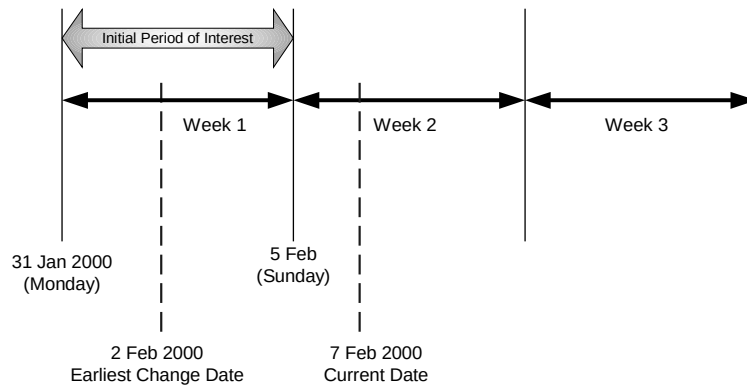
To determine the START_DT and END_DT contained in this table (the “initial period of interest” for batch creation), the selection process does the following:

- It determines the EARLIEST_CHGDT for the time reporter being processed.
- It identifies the time reporting period (based on the Time Period ID in the workgroup table) intersected by the EARLIEST_CHGDT.
- It uses the begin and end dates of the time reporting period intersected by the earliest change date as the begin and end dates of the initial period of interest. The selection process then queries the reported time tables (both punch and reported) to see if time has been reported for a future date (that is, a date following the time reporting period). If so, the end date of the initial period of interest will be set to the last date of reported time.

The start and end date information in this table is used in Step 2—Combine Time Reporters into Batches.

Example: Determining the Initial Period of Interest

Suppose that the EARLIEST_CHGDT for the time reporter you are processing is 2 February 2000, and you run Time Administration on 7 February 2000 (the current date). Assume that the time reporting period associated with this time reporter's workgroup is weekly, and that the week is defined to begin on Monday and end on Sunday. The timeline for this time reporter would look like this:



Determining the initial period of interest

As you can see from the timeline, the EARLIEST_CHGDT for the time reporter intersects a weekly calendar period that begins on 31 January 2000 (Monday) and ends on 5 February 2000 (Sunday). The system uses the begin and end dates of this week to establish the initial period of interest: 31 January–5 February.

Step 2 - Combine Time Reporters Into Batches

This process takes the time reporters listed in the TL_TA_TRLIST table and their “initial period of interest” begin and end dates and organizes them into batches based on the following two characteristics:

- Workgroup affiliation.
- Month and year.

The subprocess can be broken down into the steps described below.

To create batches:

1. Define Workgroup Affiliation.

The system determines the workgroup affiliation of the selected time reporters and organizes them into batches by workgroup. This ensures that all time reporters processed as part of the same batch share a common rule program (because each workgroup is associated with one rule program).

If a time reporter switches workgroups during the initial period of interest stored in the TL_TA_TRLIST table, the system will detect the transfer when it reads the time reporter's

TL_EMPL_DATA record. The transfer will cause Time Administration to process the time reporter in more than one batch. The same thing occurs when there are changes to Rule Program effective dates or TL_EMPL_DATA effective dates during the initial period of interest—effective dates associated with employee hires, inactivation, or job transfers. So, for example, if the rule program associated with a workgroup changes in mid period, time reporters will be processed in separate batches on either side of the change date. Similarly, because a time reporter could have more than one row in TL_EMPL_DATA with different effective dates, multiple rows per time reporter can be pushed into the batch creation process. In this case, start dates and end dates for each batch must be adjusted for such things as the TL_EMPL_DATA.EFFDT falling within the initial period of interest. For example, if the EFFDT of a time reporter is greater than the START_DT of the initial period of interest defined in the TL_TA_TRLIST table, the START_DT of the new batch will be set equal to the EFFDT.



Important! Workgroup transfers, rule program changes, and changes to employee data can, in some cases, cause rules to be applied incorrectly. For more information about the affect of workgroup changes on rule processing, see Understanding Workgroup Transfers and Understanding Changes to a Rule Program.

2. Define Month and Year.

Next, the system subdivides the batches based on workgroup affiliation into batches with the same month and year in the EARLIEST_CHGDT field on the TL_TR_STATUS table. If the initial period of interest to be processed for the time reporters in a workgroup (as defined in the TL_TA_TRLIST table) spans more than one month, the system will create multiple batches—one for each month. So, for example, if a time reporter's earliest change date (EARLIEST_CHGDT) occurs in a month that has already been processed, and time in the current or future months also needs to be processed, the time reporter will be processed in multiple batches—one for each month.



The system does not reprocess an entire workgroup simply because one member of the workgroup has prior period adjustments. Only the time reporter who has changes to prior period data will be reprocessed.



For more information about the EARLIEST_CHGDT field in the TL_TR_STATUS table, see Updating Time Reporter Status.

3. Send batches to Rule Map.

The resulting batches are then sent to the Determine Period of Interest function for time reporters described in the Build Rule Map section. The batches contain a record for each of the time reporters to be processed, the time reporter's workgroup, workgroup effective date, rule program, and rule program effective date.



The system separates time reporters into batches for efficient processing by grouping time reporters with the same Rule Program and common dates. However, it is possible that the resulting batch size may be too large to ensure rapid processing. If this is the case, you can reduce the size of batches by completing the Max Employees in Rules Run field on the TL installation page.

Step 3 - Build Rule Map

The “initial period of interest” calculated in Step 2 (above) and referenced in Step 3 represents only the minimum amount of data (or time) that needs to be processed in Time Administration. This “initial” period does not necessarily include all the time needed to process the rules in a time reporter’s rule program. To determine both how far back into the past and forward into the future Time Administration must go to retrieve, for each batch, 1) the data needed to run each individual rule in a time reporter’s Rule Program, and 2) the maximum amount of data encompassing the entire group of rules in the Rule Program, Time Administration must define a *second* period of interest for rules processing. In the following section, we’ll refer to the maximum period of time containing the data needed to run all the rules in a rule program as the *final period of interest*. In addition to defining this period, the Build Rule Map process generates an output table (TL_RULE_MAP) identifying the rules to process for each batch, the priority of the rules, the AE Section containing each rule in the rule program, the effective dates of both the Workgroup and the Rule Program, and other data.

Once the rule map is complete, Time Administration can send the correct amount of time to the Intermediate Payable Time tables for processing and identify the AE section for each rule and period of interest.

Determining the Final Period of Interest



Important! The following explanation of the final period of interest assumes that the Use Reported Time for POI check box on the Process Time Admin page is selected. For an explanation of what happens when the check box is cleared, see Process Time Admin page.

As noted above, the initial period of interest constitutes only the first step in the definition of a period for rules processing. The final rule map may need to be extended beyond this initial period:

- If a rule you are processing requires data from *before* the time reporting period intersected by the EARLIEST_CHGDT, the initial period of interest must be expanded back in time. For example, suppose that the time reporting period associated with the workgroup you are processing is weekly, and that the initial period of interest is the third week of the current month. If you are processing a monthly rule in connection with this workgroup, the final rule map will need to extend past the initial period of interest to capture data going back at least to the beginning of the month.

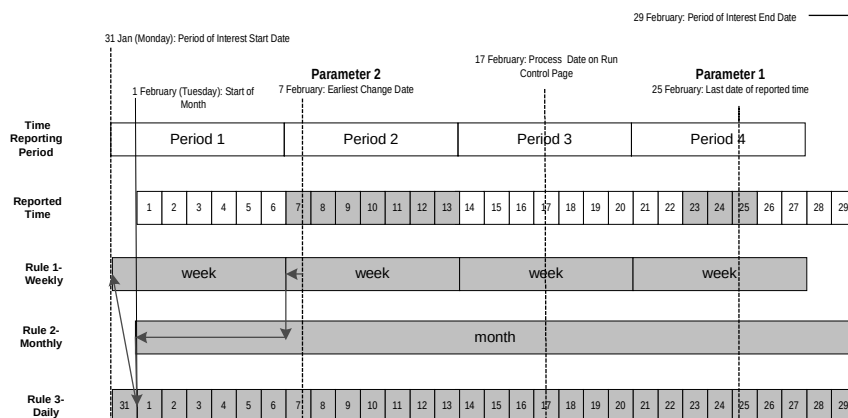
- The rules you are processing may require data from periods following the period intersected by the earliest change date. The data required may extend to the end of a rule period that both includes and goes past the initial period of interest end date.

The following example will help to illustrate how the system determines the maximum date range for the final period of interest:

Example: Determining the Final Period of Interest

In this example, let's assume that the following is true:

- The time reporter you are processing is a positive time reporter.
- The time reporting period on the time reporter's workgroup is weekly, and the week is defined to begin on Monday and end on Sunday.
- The "initial" period of interest—the weekly time reporting period intersected by the earliest change date--extends from 7 February to 13 February (Monday through Sunday).
- The last period processed for the payee is the week of 31 January (Monday) through 6 February (Sunday).
- The current week (the week to be processed) begins on 7 February.
- The payee has 3 rules in his rule program as represented in the diagram below: a weekly rule, a monthly rule, and a daily rule. Each of these rules is assigned a priority from one to three (as shown below).
- The Earliest Change Date is 7 February.
- The Process Date on the run control page is 17 February.
- The latest date of reported time is 25 February (in this example, the employee has reported a future vacation from 23 February to 25 February).



Determining the period of interest

This diagram shows how Time Administration determines the maximum date range for the period of interest through a process called pyramiding (represented in the diagram by a series of lines leading in stair-step fashion from the beginning of one rule period to the next in order of priority). The algorithm that Time Administration uses to define the begin and end dates of this period can be broken down into the following steps:

- First, Time Administration determines the latest date of reported time. In the example above, this date is 25 February. This date—identified as Parameter 1 in the diagram above—will be used to determine the final period of interest end date.



If no time is reported for “future” periods—that is, periods outside the period intersected by the earliest change date—the date of Parameter 1 would simply be the last day of the time period intersected by the earliest change date (the end of Period 2 in our example). This date would then be used in the following step.

- Using the date of Parameter 1, the system selects the latest date from all of the rule periods intersected by Parameter 1. In the above diagram, the rule period with the maximum end date intersected by Parameter 1 is the monthly rule (rule number 1). Because the end date of this rule period is 29 February, this is the date the system uses as the final period of interest end date.
- The system then determines the earliest date that an instance of Payable Time has NOT been passed to Payroll for the set (that is, the EARLIEST_CHGDT). This includes any adjustments that have been made to reported time since the previous update to payroll. This date, identified as Parameter 2 in the diagram above, is used to determine the final period of interest start date.
- To determine the period of interest start date, the Rule Map process:
 - Locates where the earliest change date (EARLIEST_CHGDT) intersects the rule period corresponding to rule 1 in the rule program. It expands the period of interest to the start of this rule period (7 February).
 - Next, it locates where the start of rule period 1 intersects the next rule in order of priority—rule 2—and expands the period of interest back to the beginning of rule period 2 (1 February).
 - It starts the process over again by locating where the start date of rule period 2 intersect the next rule in the priority list—rule 3—and expands the period of interest start date back to the beginning of rule period 3 (because rule 3 in this example is a daily rule, the period of interest stays at 1 February).
 - The rule mapping program then moves back *up* through each rule period to capture additional time that may be needed to process any rule that could impact Payable Time. Consider the example above: The weekly rule period that begins 31 January and ends 6 February overlaps with the monthly rule period. Because the weekly rule has priority and can therefore impact time (alter a TCD, create new rows in TL_IPT1, and so forth) that will later be processed by the monthly rule, the rule map pyramids backwards not just to the start of the monthly rule (1 February), but to the start of the first weekly rule period that could potentially impact the monthly rule: this is the weekly rule period that begins on 31 January.



The purpose of “pyramiding” back up through the rule program can be explained as follows: Let’s say that the weekly rule in the example above is an overtime rule that states that all time reporters should be paid at the overtime rate of 1.5 x Regular for each hour over 40. If the Rule Map process does not move back up through the rules to include the data for 31 January, the system won’t know if or when the condition for this rule was fully satisfied, and incorrect time data could then be passed to the monthly rule. Consider this scenario: Your time reporters all work ten hours a day for 5 days during the week beginning 31 January. If the weekly overtime rule does not include the first day of the workweek—31 January—it will appear that no one worked overtime during the week. But in fact, the condition needed to trigger overtime pay was met at the end of the fourth day of work (x 10 hours per day). This means that the last day of the week needs to be paid at the overtime rate. This information can then be made available to the monthly rule, because there are dependencies between the rule periods.

Understanding How Time Administration Uses the Final Period of Interest

Once the system has defined the range of dates that make up the final period of interest, Time Administration:

- Transfers the data for this range of dates to Intermediate Payable Time.
- Then, after Intermediate Payable Time has been processed, Time Administration passes all or part of this time to Payable Time.

In this section we’ll talk about the difference between the final period of interest, Intermediate Payable Time, and Payable Time, and then describe how Time Administration calculates Payable Time.

Understanding the Relationship Between the Final Period of Interest, Intermediate Payable Time, and Payable Time

In Time and Labor, the range of dates transferred to Intermediate Payable Time is exactly equivalent to the final period of interest. This period includes all the data needed to process each rule in your rule program. However, the amount of data in Intermediate Payable Time can differ from the time data that Time Administration transfers to Payable Time. This is because the function of Payable Time is to supply time data to external systems like Payroll or Project Costing, while the function of the period of interest Rule Map is to supply Intermediate Payable Time with the data needed to run Time and Labor rules. The range of dates needed to process these rules may be considerably larger than the range of dates needed by Payroll or Project Costing. For example, suppose you are processing a workgroup whose period type is weekly, and that the week you are processing falls in the middle of the month. The rule program for this workgroup contains several monthly rules. Your payroll system may only be interested in data for the week you are currently processing, but your Time and Labor rules will need data going back at least to the beginning of the current month (to satisfy the needs of your monthly rules).

Let’s look at the following rules for how Time Administration creates Payable Time for positive time reporters, and then review what would happen in the case of an exception reporter.

Rules for Positive Time Reporters

To create Payable Time for positive time reporters:

- Time Administration transfers to Payable Time all dates within the current time reporting period for which time has been reported positively.

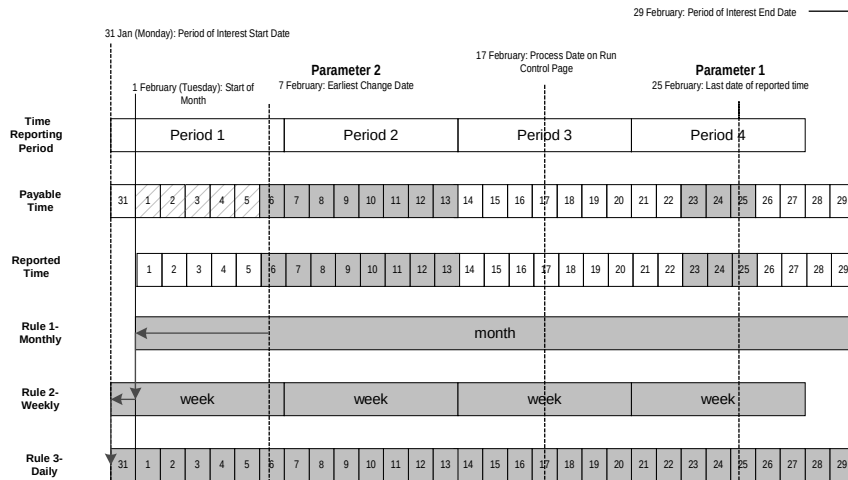
In addition, Payable Time includes:

- Any positively reported time for dates before the current workgroup period.
- Any positively reported time for dates following the current workgroup period.
- Payable Time will also include days for which time has been created using rules processing.

Example: Payable Time for Positive Time Reporters

Let's use a slightly modified version of the example we used earlier to illustrate the Build Rule Map Process to show the type and extent of the data that can be passed from Intermediate Payable Time to Payable Time. In this example let's assume the following:

- The time reporter we are processing is a positive time reporter.
- The time reporting period on the time reporter's workgroup is weekly, and the week is defined to begin on Monday and end on Sunday.
- The last period processed for the payee is the week of 31 January (Monday) through 6 February (Sunday).
- The current week (the week to be processed) begins on 7 February.
- The payee has 3 rules in his rule program as represented in the diagram below: a monthly rule, a weekly rule, and a daily rule. Each of these rules is assigned a priority from one to three (as shown below).
- The Process Date on the run control page is 17 February.
- The latest date of reported time is 25 February (in this example, the employee has reported a future vacation from 23 February to 25 February).
- The time reporter enters new time data for 6 June, a day that has already been processed and sent to payroll: He originally reported working 8 hours on 6 June when he actually worked 12, and has now corrected the mistake.
- The earliest change date is 6 February—the day for which the time reporter has entered new data (see above).



Determining Payable Time

Using this diagram, we can illustrate the different sources of time data that can be transferred to Payable Time.

Source 1: Positively Reported Time Within the Current Workgroup Period

In this example, the time reporter has reported time for each of the days in the time reporting period that begins on 7 February and ends on 13 February. The data for these dates is therefore passed to Payable Time.

Source 2: Positively Reported Time for Dates Prior to the Current Workgroup Period

As illustrated in the diagram above, the time reporter reports new time data for 6 June—a day that falls within a previously processed period (he originally reported working 8 hours on 6 June when he actually worked 12).

Source 3: Positively Reported Time for Dates Following the Current Workgroup Period

In this example the time reporter reports three future vacation days: 23, 24 and 25 February. This data must be passed to Payable Time.

Source 4: Time Created Using Rules Processing

To illustrate this last source of data, we need to make a small modification to our example. Let's assume that the monthly rule in the diagram above states that as soon as a time reporter works more than 10 hours of overtime in a given month, any overtime hours paid at the normal rate must be recalculated and paid at twice the normal rate. Let's also assume that the new data our time reporter has entered for 6 February (see Source 2 above) increases the total number of overtime hours worked for the month to 11 hours. Because of this, the condition for the monthly rule is satisfied, and all previously reported overtime hours must be recalculated using the new rate (2 x normal rate). Assuming that our time reporter logged overtime hours on 1-5 February at the normal rate, these days (marked by cross-hatching in the diagram) will be recalculated, offsets generated, and new data will be sent to Payable Time.



The Process Date on the run control page has no *direct* affect on what gets sent to Payable Time in the case of positive time reporters—its primary function is simply to select time reporters for processing. Time Administration only processes time reporters whose earliest change date is less than or equal to ($\leq$) the Process Date.

Rules for Exception Reporters

To create Payable Time for exception reporters:

- Time Administration creates Payable Time from the time reporters' schedules for all dates within the current time reporting period (as long as the current period falls within the period of interest). If any day within this period has positive time reported for it, the positive time will take precedence over scheduled time—that is, Time Administration will not use the scheduled hours for that day.
- In addition to the dates within the current time reporting period, Payable Time includes:
 - Any positively reported time for dates before the current workgroup period.
 - Any positively reported time for dates following the current workgroup period.
 - Payable Time will also include days for which time has been created using rules processing.
- In the case of exception reporters, you can also use the TA System Date on the run control page to send additional data to Payable Time according to the following criteria:



The TA System date refers to either the “system date” or the “Process Date” on the run control page.



For more information about how Time Administration determines the TA system date, see *Launching the Time Administration Process*.

- If any rule period you are processing is $\geq$ to the current workgroup period length, you can create Payable Time outside the current workgroup period by placing the Process Date *outside* the workgroup period but *within* the date range of the rule period that extends into the future. When you do this, you'll create Payable Time from the start of the current workgroup period up to the end of the time reporting period in which you set the Process Date—as long as the rule period extends at least to the end of this time reporting period. If the rule period ends before the time reporting period, then the last date for which time data will be passed to Payable Time is the end date of the rule period.
- If all rule period lengths are $\leq$ the current workgroup period length, then Payable Time will be created from the time reporters' schedules for the current workgroup period (time reporting period) only—regardless of the Process Date.
- Regardless of how far past the current workgroup period a rule period extends, if the user

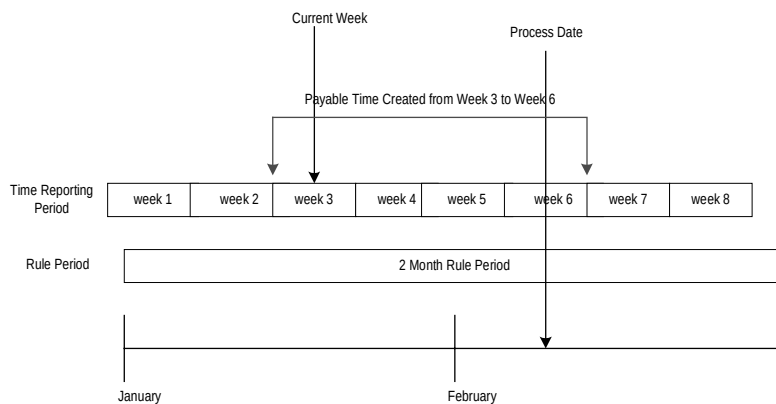
uses a Process Date that is within the date range of the current workgroup Time Period ID, Time Administration will create time for exception reporters for the current workgroup period only (regardless of the date ranges for the rule periods).



Because of the widely differing results you can get, we do not recommend that you set the Process Date after the current workgroup period. This will ensure that all exception reporters will have time created for them within the current period.

Let's take a look at an example in which we use the Process Date to expand Payable Time from the current workgroup period to the end of a future period, and then at an example in which the rule period limits the extension of Payable Time into the future.

Example 1: Expanding Payable Time to the End of a Future Workgroup Period



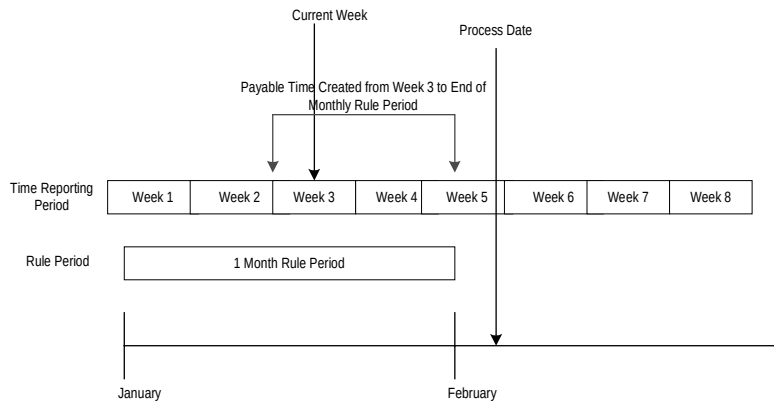
Payable Time extends to future period

In this example let's assume the following:

- Week 3 is the current workgroup period (the week to be processed).
- There is a two month rule associated with the workgroup.
- The Process Date is set to Week 6.

Because the two month rule period that begins in January extends past the current workgroup period (Week 3) to the end of February, when we set the Process Date to Week 6, Payable Time will be created from schedules to the end of Week 6.

Example 2: End of Rule Period Limits Extension of Payable Time



Expansion of Payable Time limited by rule period end date

In this example let's assume the following:

- Week 3 is the current workgroup period (the week to be processed).
- There is a one month rule associated with the workgroup.
- The Process Date is set to the end of Week 5; however, the one month rule period ends before this—in the middle of Week 5.

Because the one month rule period in this example extends past the current workgroup period (Week 3), when we set the Process Date to the end of Week 5, Payable Time will be created into the future. However, Payable Time will not be created past the last day of January, even though the Process Date is in February. This is because Payable Time extends either to the end of the time reporting period intersected by the Process Date, or to the end of the rule period—whichever comes first.



In this example, if we had set the Process Date to the first day of Week 5, Payable Time would still only be created to the end of January. Again, this is because Payable Time extends either to the end of the time reporting period intersected by the Process Date, or to the end of the rule period—whichever is first.

Understanding the Sources of Payable Time

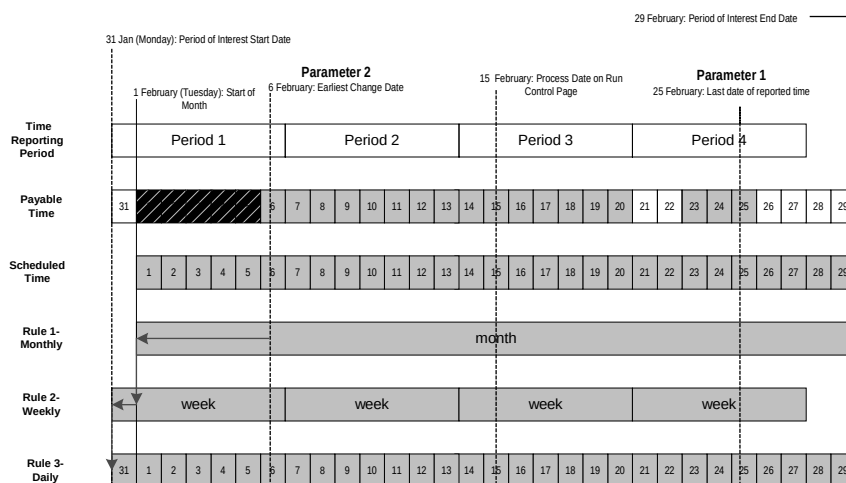
Now that we've reviewed several examples of how you can use the Process Date on the run control panel to extend Payable Time past the current workgroup period, let's look at a more comprehensive example that illustrates all the sources of time data that can be transferred to Payable Time in the case of an exception reporter:

Example 3: Determining Payable Time for Exception Reporters

In this example, let's assume that the following is true:

- The time reporter you are processing is an exception time reporter.

- The time reporting period on the time reporter's workgroup is weekly, and the week is defined to begin on Monday and end on Sunday.
- The last period processed for the payee is the week of 31 January (Monday) through 6 February (Sunday).
- The current week (the week to be processed) begins on 7 February.
- The payee has 3 rules in his rule program as represented in the diagram below: a monthly rule, a weekly rule, and a daily rule. Each of these rules is assigned a priority from one to three (as shown below).
- The earliest change date is 6 February.
- The Process Date on the run control page is 15 February.
- The latest date of reported time is 25 February (in this example, the employee has reported a future vacation from 23 February to 25 February).
- The time reporter enters new time data for 6 June, a day that has already been processed and sent to payroll: He originally reported working 8 hours on 6 June when he actually worked 12, and has now corrected the mistake.
- The earliest change date is 6 February—the day for which the time reporter has entered new time data (see above).



Determining Payable Time

Using this diagram, we can illustrate the different sources of time data that can be transferred to Payable Time.

Source 1: Time Within the Current Workgroup Period

In this example, the current workgroup period begins on 7 February and ends on 13 February. The data for these dates is therefore passed to Payable Time.

Source 2: Time Created By Setting The Process Date After the Current Workgroup Period

Because the monthly rule period in this example extends past the current workgroup period, and the Process Date (15 February) has been set outside the workgroup period, Payable Time is created into the future—as far out as the end of Period 3 (the time reporting period intersected by the Process Date).

Source 3: Positively Reported Time for Dates Prior to the Current Workgroup Period

As illustrated in the diagram above, our exception reporter positively reports new time data for 6 June—a day that falls within a previously processed period (he was scheduled to work 8 hours on 6 June when he actually worked 12).

Source 4: Positively Reported Time for Dates Following the Current Workgroup Period

In this example the time reporter reports three future vacation days: 23, 24 and 25 February. This data must be passed to Payable Time.

Source 5: Time Created Using Rules Processing

To illustrate this last source of data, we need to make a small modification to our example. Let's assume that the monthly rule in the diagram above states that as soon as a time reporter works more than 10 hours of overtime in a given month, any overtime hours paid at the normal rate must be recalculated and paid at twice the normal rate. Let's also assume that the exception reporter in our example positively reports new time for 6 February (see Source 3 above), and that the newly reported hours increase the total number of overtime hours worked for the month to 11 hours. Because of this, the condition for the monthly rule is satisfied, and all previously reported overtime hours must be recalculated using the new rate (2 x normal rate). Assuming that our time reporter logged overtime hours on 1-5 February at the normal rate, these days (marked by cross-hatching in the diagram) will be recalculated, offsets generated, and new data will be sent to Payable Time.

Step 4 - Build Time Reporter Profiles

This process extracts time reporter data for each batch of time reporters from different tables in the HRMS system and loads it into a single working table, TL_PROF_WRK, that you can refer to each time you need basic time reporter data within a rule. Thus, rather than having to refer to multiple tables, you can look to a single table containing data on the time reporters in each of your batches for the period of interest defined by the Build Rule Map process. When you create rules in SQL, you can define a join to this table to retrieve common information relating to all the time reporters you need to process.



For more information about the fields in the TL_PROF_WRK table, see Using Common HR Data in Your Rules.

Step 5 - Punch Matching

The Punch Matching process transforms raw punches into a first cut of Intermediate Payable Time. It does this by first selecting punches that fall within the date range specified by the Build

Rule Map process. The Punch Matching process calls the schedule resolution process to resolve the time reporters' schedules.

This process is described below.

To match punches:

1. Select all appropriate punches for processing.

The system gathers punches from either the time reporter's scheduling table (WRK_ADHOC_TAO) if Forecast Scheduled Time was chosen on the Time Administration Run Control page, (or the time reporter is of exception type), or the reported Punch Time table (TL_RPTD_PCHTIME).

To select the appropriate punches for processing, the system looks to the TL TA Batch file which contains the list of time reporters to select from and the start/end date for each time reporter. The system identifies the first punch to process by looking for the last out punch that occurred before the start date in the TL TA Batch file, no matter how far back in the calendar it must go. If it locates an out punch before the start date, it knows that it must use the first in punch on the start date as the initial punch for processing. Otherwise, it will begin processing with the last in punch that occurred before the start date. This is to ensure that the system begins processing with the correct first punch, even if that punch was entered before the initial start date.

If the last punch selected using the end date is not an out punch, the system looks to the future for the next out punch and stores all punches up to and including the next out punch.

2. Apply pre-rules rounding.

At this point in the process, Time Administration looks to the Rounding Options you selected on the Workgroup page to determine whether it should round punches. There are three options for rounding on this page:

- Round Punches Before Rules (Punch Rounding)
- Segment Rounding
- Day Rounding

Each rounding option can have a different effect on how time is processed as well as the amount of time that is converted to Payable Time. In other words, two time reporters could each record the same in and out punches for a day or a week, but depending on the rounding options you select, the amount of time sent to Payable Time could be different for each time reporter.

The Punch Matching process is only concerned with the first option: Round Punches. The other two types of rounding are applied as part of the Round Punches subprocess described in Step 8 – Perform Post-Rules Rounding.



The Round Punches process is skipped if Forecast Payable Time is chosen on the run control page, because scheduled punches are already rounded.



For more information about rounding and examples of how Time Administration rounds punch time, see Establishing Workgroups.

3. Apply daybreaker logic.

This subprocess is triggered only when the Split By Day Breaker option is selected on the Workgroup page. Depending on the day breaker logic you select, you can apply all the time worked in a shift to the day on which the shift begins; split the time using a day breaker; apply all the time to the day on which the shift ends; or assign the time to the day in which the majority of the time falls. So for example, if a time reporter works a shift that begins at 8:00 PM and continues until 5 AM of the next day, and you select 12 midnight as the day breaker, 4 hours would accrue to the day on which the time reporter began work, and 5 hours would go to the subsequent day.



For more information about day breakers, see Specifying Day Breaker Options.

4. Calculate the duration of punches.

When the system encounters a series of punches, it converts punch time into output that resembles elapsed time. It does this by matching a punch with the next corresponding punch and then calculating the difference between them (the amount in **TL_QUANTITY** below). The resulting in and out segments, as indicated in the table, are then sent to Intermediate Payable Time for use in rules processing.

Punches	Begin	End	TL_QUANTITY
In	8:00	10:00	2.00
Break	10:00	10:15	.25
In	10:15	12:00	1.75
Meal	12:00	13:00	1.00
In	13:00	15:00	2.00
Break	15:00	15:15	.25
In	15:15	17:00	1.75
Out	17:00		



The Calculate Duration process will be skipped if Forecast Scheduled Time is selected on the Run Control page. This is because time reporter schedules already contain the calculated duration between punches.

Step 6 - Create Intermediate Payable Time

Before Time Administration can execute a rule, it moves the data needed to run the rule from scheduled and reported time into a data store known as Intermediate Payable Time. The system will then apply the rule to information in the data store for the appropriate period of interest (as defined by the Build Rule Map process).

This section describes the structure of the Intermediate Payable Time data store, as well as the type and source of the data it contains.

Understanding the Data Store

The Intermediate Payable Time data store is made up of the following five tables:

- TL_IPT1
- TL_IPT2
- TL_IPT3
- TL_IPT4
- TL_IPT5

Initially, Time Administration loads all reported and scheduled time data for all time reporters who need to be processed into TL_IPT1. In your rules, you can move data back and forth between TL_IPT1 and the other Intermediate Payable Time tables, or to other working tables in the system. For example, your rule could move time data from TL_IPT1 to TL_IPT2, apply a specific TRC to this time, and then update the original row of data in TL_IPT1 with the new TRC associated data.

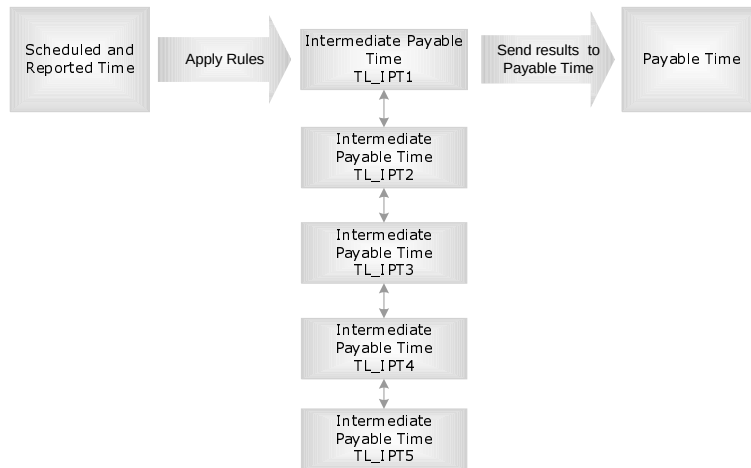


Only processed data in TL_IPT1 is transferred to Payable Time at the end of the Time Administration run. Therefore, after your rules work on the data in other tables, you need to return any processed data you want to send to Payable Time back to TL_IPT1.



Never truncate or delete the data in TL_IPT1; it contains time data in raw form that is needed to execute your rules. If you delete this data, your rules will be left with nothing to process.

The movement of data from scheduled and reported time to Intermediate Payable Time, and from Intermediate Payable Time to Payable Time, is illustrated in the following diagram:



Processing Intermediate Payable Time

Loading the IPT Tables

For each batch of time reporters it processes (in CREATE_IPT), Time Administration loads data into TL_IPT1 from the following sources in the order listed below. This information will be used later by the Create Payable Time process.

Reported Time

- For elapsed time reporters, the system retrieves reported elapsed time from the Elapsed Time table (TL_RPTD_ELPTIME).
- For punch time reporters, the system retrieves rounded punches created by the Rounding Punches process that runs before the Create IPT process.
- For exception time reporters, the system pulls time from the schedule table (WRK_ADHOC_TAO) for days the time reporter was scheduled to work. (If an exception time reporter positively reports time on a particular day, the reported time takes precedence over the scheduled time.)
- If a person reports both elapsed and punch time on the same day, Time Administration retrieves both sets of time.
- If creating Forecasted Payable Time and reported time is not available, Time Administration fetches scheduled time for positive time reporters from the WRK_ADHOC_TAO table.

Task Information

- If a taskgroup was positively reported, its value populates the TL_IPT1 table. If no taskgroup was reported, Time Administration populates TL_IPT1 with the taskgroup assigned to the time reporter on the Employee Data table (TL_EMPL_DATA) through the Create Time Reporter Data page or Maintain Time Reporter Data page.

- If a task profile ID was positively reported, its value populates the TL_IPT1 table. If no task profile was reported, Time Administration populates TL_IPT1 with the task profile assigned to the time reporter on the Employee Data Table (TL_EMPL_DATA) through the Create Time Reporter Data page or Maintain Time Reporter Data page. If it does not find a task profile on the Employee Data table, it populates TL_IPT1 with the default task profile associated with the time reporter's taskgroup in the Taskgroup table (TL_TASKGRP_TBL).
- Task template IDs are always retrieved from the Taskgroup table (TL_TASKGRP_TBL) to populate TL_IPT1. Task template IDs are not positively reported.
- If task data was positively reported, the values of the task entities populate TL_IPT1.



For more information about task reporting, see Defining Task Reporting Requirements.

Rules Override Transactions

If rule overrides have been entered through the Override Rules page, the Time Administration process will extract the overridden records from TL_IPT1 and place them into the working table, TL_TA_RUL_OVR, before applying rules to the data stored on TL_IPT1.



For more information about rules overrides, see Overriding Rules for a Day.

Time Administration will apply rules to all records stored on TL_IPT1 and proceed to update Payable Time as it normally does. But, as a final step, Time Administration uses data stored in the TL_TA_RUL_OVR table (preserved – untouched by rules) to replace records found on the TL_PAYABLE_TIME table.

The IPT Table Structure

The fields that make up the Intermediate Payable Time tables are listed in the following table.

Field Name	Description
EMPLID	Employee Identification Number
EMPL_RCD	Employee Record Number - to handle multiple jobs.
DUR	Date Under Report (Date in which time is reported for)
SEQ_NBR	Sequence Number
PUNCH_TYPE	Punch Type (In, Out, Break, Meal, etc.)
PUNCH_BEGIN	Punch Begin Date Time
PUNCH_BEGIN_R	Punch Begin Date Time Rounded
TIME_IN_MIN1	Punch Begin Time In Minutes (to be used in rules where Begin

	Time and End Time need to be compared)
PUNCH_END	Punch End Date Time
PUNCH_END_R	Punch End Date Time Rounded
TIME_IN_MIN2	Punch End Time In Minutes (to be used in rules where Begin Time and End Time need to be compared)
TIMEZONE	Time Zone
TCD_ID	Time Collection Device Identification Number
BADGE_ID	Badge Identification Number
EST_GROSS	Estimated Gross Amount
LBR_DIST_AMT	Labor Distributed Amount
DILUTED_GROSS	Diluted Gross Amount
CURRENCY_CD1	Currency Code 1
CURRENCY_CD2	Currency Code 2
RULE_ELEMENT_1	Rule Element 1 - to be used in custom rules
RULE_ELEMENT_2	Rule Element 2 - to be used in custom rules
RULE_ELEMENT_3	Rule Element 3 - to be used in custom rules
RULE_ELEMENT_4	Rule Element 4 - to be used in custom rules
RULE_ELEMENT_5	Rule Element 5 - to be used in custom rules
RULE_FLAG1	Rule Flag 1 - to be used in rules
RULE_FLAG2	Rule Flag 2 - to be used in rules
RULE_FLAG3	Rule Flag 3 - to be used in rules
RULE_FLAG4	Rule Flag 4 - to be used in rules
RULE_FLAG5	Rule Flag 5 - to be used in rules
TASKGROUP	Task Group
DFLT_TASKGROUP	Default Task Group
TASK_PROFILE_ID	Task Profile ID
DFLT_TASK_PROF_ID	Default Task Profile ID
DFLT_TASKTMPL_ID	Default Task Template ID
PERIOD_INSTANCE	Period Instance - to be used in rules
PERIOD_SEQUENCE	Period Sequence - to be used in rules
PAYABLE_STATUS	Payable Status
IN_BATCH	In Batch (only records with IN_BATCH = Y will be written to TL_PAYABLE_TIME)
OFFDAY_IND	Off Day Indicator

TRC	Time Reporting Code
TL_QUANTITY	Quantity (can be hours, amount, or units)
CURRENCY_CD	Currency Code
COUNTRY	Country
STATE	State
LOCALITY	Locality
COMP_RATECD	Compensation Rate Code
BILLABLE_IND	Billable Indicator
OVERRIDE_RATE	Override Rate
COMPANY	Company
BUSINESS_UNIT	Business Unit
SETID_LOCATION	Set ID Location
LOCATION	Location
SETID_DEPT	Set ID Department
DEPTID	Department ID
SETID_JOBCODE	Set ID Job Code
JOBCODE	Job Code
POSITION_NBR	Position Number
PRODUCT	Product
CUSTOMER	Customer
ACCT_CD	Account Code
BUSINESS_UNIT_PC	Business Unit Project Costing
BUSINESS_UNIT_PF	Business Unit Project Performance Measurement
PROJECT_ID	Project ID
SETID_ACTIVITY	Set ID Activity
ACTIVITY_ID	Activity ID
RESOURCE_TYPE	Resource Type
SETID_RESOURCE	Set ID Resource
RESOURCE_CATEGORY	Resource Category
RESOURCE_SUB_CAT	Resource Subcategory
TASK	Task
USER_FIELD_1	User Defined Field 1 - additional task field defined by the user

USER_FIELD_2	User Defined Field 1 - additional task field defined by the user
USER_FIELD_3	User Defined Field 1 - additional task field defined by the user
USER_FIELD_4	User Defined Field 1 - additional task field defined by the user
USER_FIELD_5	User Defined Field 1 - additional task field defined by the user
TL_RULE_ID	Rule ID - to indicate that the record has been updated or inserted by a rule
ORIG_TRC	Original Time Reporting Code (TRC can be changed by rules)
ORIG_TL_QTY	Original Quantity (Quantity can be updated by rules)

Step 7 - Track Attendance

The Track Attendance process tracks attendance violations committed by punch time reporters including Tardies, Long Lunches, Early Outs, and Long Breaks. It prompts you to take one of the recommended actions you defined on the Attendance Actions page. This process catches violations by comparing actual punch times logged by punch time reporters to their schedules. If a time reporter punches in late, leaves early, or takes a long meal or break, the Attendance process can recognize the infraction. Each infraction receives a certain user defined point value and point values exceeding the threshold you established on the Attendance Program page will trigger a user-defined action. You can view the recommended actions for each time reporter on the Recommended Actions page.

Step 8 - Process Rules

When you create a rule in Time Administration you must assign the rule to an Application Engine section. When it is time to execute the rule, Process Rules uses the Rule Map created in Step 3 - Build Rule Map, to call the AE section for the appropriate rule and period of interest. Each rule in a Rule Program is processed for every time reporter to whom the rule applies at the same time.



For more information about assigning rules to Application Engine sections through Rule Programs, see Adding Rules to a Rule Program. For more information about Application Engine in general, see Application Engine in your PeopleTools documentation.



To protect the integrity of the source data, you should always run rules that change or manipulate time against the data in the Intermediate Payable Time tables rather than against the scheduled or reported time tables.

Step 9 - Perform Post Rules Processing

This process performs the following functions:

- Validates the data generated as a result of rules processing of task data and TRC data.
- Calculates and validates leave and comp time balances.
- Updates each time reporter's task profile.
- Applies post rules rounding to processed time data.
- Calculates estimated gross amounts.



Numerous validations are run during post rules processing. All the exceptions generated by these validations are delivered with PeopleSoft Time and Labor and have a severity level of high. They are written to the TL_EXCEPTION table. Payable Time will not be created for time reporters on the days for which there are medium and high level exceptions.



For general information about validations and exceptions in PeopleSoft Time and Labor, see Understanding Validating Time. **For specific information** about the validations that occur in Time Administration and elsewhere in the system, see Appendix A: Exceptions and Validations.

Time Validation

Post Rules time validation in Time Administration applies to the TRC and task data created by rules processing. For example, you might create a rule that sets all time reported without a TRC to a TRC of Reg. In another rule, you might specify that all Reg hours over eight in a day should be paid at the overtime rate of 1.5 using the TRC "OVT1.5." Suppose, however, that the overtime rate represented by "OVT1.5" is no longer in the TRC program for the workgroup you are processing; instead, it has been replaced by a different TRC called OVTPay. In a case like this, Time Validation would generate an exception noting that the TRC "OVT1.5" was no longer valid for this workgroup.



For more information about the specific time validations and exceptions that occur in Time Administration, see Appendix A: Exceptions and Validations.

Check Leave and Comp Time Balances

This subprocess ensures that leave and comp time hours recorded in the Intermediate Payable Time table (TL_IPT1) do not exceed the available balance. If reported hours exceed the available balance, an exception will be written to the Exceptions table. If the comp time balance or leave time balance is sufficient, Time Administration will update Payable Time.

Check Leave Balance

This subprocess checks to see if there is sufficient balance to cover the leave time contained on the IPT table for each time reporter. If there is insufficient balance, the system writes an exception to the Exceptions table.

For the setup to be valid for leave processing to occur, please note the following:

- The TRC must be active and the Comp/Leave Indicator must be for Leave Taken (Leave Tkn)
- The Leave TRC must be of the Hours TRC Type
- The TRC must be in the Time Reporter's TRC Program.
- The TRC must be mapped to a NA Payroll Earnings Code, which has a mapping to a Leave Plan Type and has the "Taken" Flag selected on the Add to Accrual Balance section of the NA Earnings Code.
- The Time Reporter must be associated to a Leave Plan of the Leave Plan Type to which the NA Earnings Code is associated.
- The Leave Plan for the time reporter should specify if it allows a negative balance, and if so, how many hours the balance for the time reporter can go negative.



Leave balances are maintained by PeopleSoft Benefits. Time and Labor does not update Benefits tables with balance information; however, it uses the Leave Plan table (LEAVE_PLAN_TBL) and Leave Accrual table (LEAVE_ACCRUAL) of the Benefits system to validate time reported against TRCs of leave, for the availability of leave.



To allow leave balances to go negative, you must select the Allow Negative Balance check box on the Leave Plan table, which is part of the Benefits system. The Maximum Negative Hours Allowed (MAX_NEG_HRS) field will then become available for data entry, and you can specify the maximum negative hours allowed under the Leave Plan. This field will remain hidden if the Time and Labor product is not selected on the Installation table.

This sub-process can be broken down as follows:

To calculate leave balance:

1. Check Time and Labor Installation table.

The system first checks the Time and Labor Installation table to see whether Leave Balance validation has been selected. The user can select Online Only validation, Batch Only validation, Both Online and Batch validation, or None. If Both or Batch Only has been selected, Time Administration will validate leave time.

2. Check TRCs on IPT table against settings on TRC table.

Next, the system checks the TRC on the Intermediate Payable Time table TL_IPT1 against the TRC table TL_TRCPGELE_TBL for valid TRCs for the workgroup, and for the Comp Leave Indicator on TL_TRC_TBL. This subprocess runs for those TRCs you have defined as having an affect on comp/leave of “Leave Taken” on the TRC Setup page.

3. Check Leave Accrual table to calculate available hours.

Next, the system goes to the Leave Accrual table to calculate available hours using the following formula:

$$\begin{aligned}
 \text{Available Hours} = & \text{Hours carried over from previous year} \\
 & + \text{Earned year-to-date} \\
 & - \text{Taken year-to-date} \\
 & + \text{Adjusted year-to-date} \\
 & + \text{Bought year-to-date} \\
 & - \text{Sold year-to-date} \\
 & - \text{Unprocessed hours taken} \\
 & - \text{Unprocessed hours adjusted} \\
 & - \text{Unprocessed hours sold}
 \end{aligned}$$

4. Check reported leave against available balance.

Finally, the system checks reported leave against the available balance as follows:

If available hours + negative hours allowed < reported comp time taken, the system writes a high severity exception to the Exceptions table. If this is not the case, the system continues processing.



For more information about Leave Plan validation and Leave Plan tables used by PeopleSoft Time and Labor, see Setting Up Your Basic Tables. And For more information about the leave-related validations and exceptions that occur in Time Administration, see Appendix A: Exceptions and Validations.

Check Comp Time Balance

This subprocess determines whether there is a sufficient balance to cover the comp time hours recorded on the TL_IPT1 table for each time reporter. If there is an insufficient balance, the system writes an exception to the Exceptions table. If the balance is sufficient, the system updates the Payable Time table.

For the setup to be valid for comp time processing to occur, please note the following:

1. The Comp TRC must be active and have a Comp/Leave Indicator of either Comp Earned (CT Earned) or Comp Taken (CT Taken)
2. The Comp TRC must be of an Hours TRC Type
3. The Comp Time TRC must be in the time reporter's TRC Program
4. The Comp Time TRC must be associated to the time reporter's Compensatory Time Off Plan
5. You must have defined the appropriate limits on the time reporter's Compensatory Time Off Plan

This sub-process can be broken down as follows:

To calculate comp time balance:

1. Check Time and Labor Installation table.

First, the system checks the TL Installation Table (TL_INSTALLATION) to see if Comp Balance validation has been selected. The user can select Online Only validation, Batch Only validation, Both Online and Batch validation, or None. If either Batch Only or Both is selected, Time Administration will validate comp time.

2. Check TRCs on IPT table against settings on TRC table.

Next, the system checks TRCs on the Intermediate Payable Time table TL_IPT1 against TL_TRCPGELE_TBL for valid TRCs in the TRC Program, and TL_TRC_TBL for the Comp Leave Indicator on the TRC table. For those TRCs defined as affecting CT Earned (Comp Time Earned) or CT Taken (Comp Time Taken) on the TRC Setup page, Time Administration will process them against the Time Reporter's comp plan.

3. Calculate available hours.

If the TRC being processed is for Comp Time Taken, the system calculates available hours in each comp time plan as follows:

Available Hours for Comp Time Taken =

- Sum of comp time earned (if any, else set to zero)
- Sum of comp time expired (if any, else set to zero)
- Sum of comp time taken (if any, else set to zero)
- + Maximum negative hour

4. Check comp time taken against available balance.

The system then checks to see if the reported Comp Time Taken is more than the available hours:

If reported Comp Time Taken is > the available hours + negative hours allowed, the system

writes a high-severity exception to the Exceptions table. If the balance is sufficient to cover comp hours earned, and Payable Time is not yet updated, the system will insert a new row of data into TL_PAYABLE_TIME for the applicable TRCs.

5. Calculate comp time earned.

If the TRC being processed is for Comp Time earned, the system calculates the available hours for each comp time plan as follows:

$$\begin{aligned}
 \text{Available Hours for Comp Time Earned} = & \text{Sum of comp time earned} \\
 & - \text{Sum of comp time expired} \\
 & - \text{Sum of comp time taken} \\
 & + \text{Maximum positive hours}
 \end{aligned}$$

6. Check comp time earned against available balance.

The system then checks to see if the reported Comp Time earned is more than the available hours:

If reported Comp Time Earned is > the available hours, the system writes a high-severity exception to the Exceptions table. If the balance is sufficient to cover comp hours earned, and Payable Time is not yet updated, the system will insert a new row of data into TL_PAYABLE_TIME.



For more information about setting up comp time plans in PeopleSoft Time and Labor, see Establishing Comp Time Plans. And For more information about the comp time validations and exceptions that occur in Time Administration, see Appendix A: Exceptions and Validations.

Expand Task Profiles

When a task profile is reported positively or has been updated by the system during Step 6-- Create Intermediate Payable Time, the Expand Task Profiles subprocess expands the corresponding Intermediate payable time records with proper detailed task data after rules have been applied.

For example, a time reporter may have reported the Task Profile "AB," which contains 50% of Project A and 50% of Project B. If the time reported is 8 hours, this process splits these 8 hours into 4 hours each for Projects A and B.

Apply Post Rules Rounding

At this point in the process, Time Administration looks to the Rounding Option you selected on the Workgroup page to determine whether it should apply Segment Rounding or Day Rounding. If you have selected one of these rounding types, the system will apply the specific rounding rules you defined on the Workgroup page.



There are two types of rounding in PeopleSoft Time and Labor: pre-rules rounding and post rules rounding. Pre-rules rounding applies only to punch time data. Segment Rounding and Day Rounding apply after rules have been processed, but before time is transferred to Payable Time.



For more information about rounding and examples of Segment and Day rounding, see Establishing Workgroups.

Calculate Estimated Gross

The Calculate Estimated Gross process determines the estimated gross for each row contained in the Intermediate Payable Time table when you set the Calc Estimated Gross field on the TL Installation page to “Y” (yes).

The system uses the following formula to calculate the gross:

$TL\_QUANTITY \times (COMPRATE + FACTOR\_RATE\_ADJ) \times FACTOR\_MULT$

The components of this formula can be defined as follows:

Components/Fields	Definition
TL_QUANTITY	The quantity entered by the time reporter or taken from the time reporter's schedule, if applicable.
COMPRATE	Either a rate or a compensation rate code. The derivation of the rate code is explained in Step 1 under Calculate Estimated Gross below.
FACTOR_RATE_ADJ	The Rate Adjustment Factor defined for the TRC on the TRC 1 page.
FACTOR_MULT	The Multiplication Factor defined for the TRC on the TRC 1 page.

To calculate estimated gross:

1. Derive the Comp Rate.

The Time Administration process derives the Rate in the Comp Rate variable as follows:

1. When a time reporter enters an override rate on the time reporting pages, the system uses this rate. This rate resides in the Intermediate Payable Time table TL_IPT1.
2. When a time reporter enters a comp rate code on the time reporting pages, the system attempts to derive the rate in the Comp Rate Code (CRC) from the following locations in this order:
 - The Comp Rate Code table (PS_COMP_RATECD_TBL). If the comp rate is not there, it then looks at:
 - The Compensation table (PS_COMPENSATION); if the comp rate is not there, it then looks at:
 - The Job Code table (more specifically, the PS_JOB_CD_COMP_RATE field on PS_JOB)
3. If no rate or comp rate code is reported, the system will look for a rate on the TRC table.



If the Comp Rate Code (CRC) is HF (hourly + flat), the reported rate will be added to the amount on the CRC and then inserted into the basic formula. If the CRC is PH (percent of hourly), the percent will be calculated against the reported rate before inserting into the basic formula.

4. If the system finds nothing in these locations, it uses the hourly rate associated with the TRC in the Intermediate Payable Time table TL_IPT1.



When a TRC is of type Amount, the Quantity (QTY) is placed into the Estimated Gross field in Intermediate Payable Time. Other calculations are bypassed. If the TRC is of type Amount and is mapped to a NA Payroll Earnings Code where Mult Factor = 0, then the amount passed to IPT for Est Gross will be 0.

5. If the system cannot find the information in the above locations, it takes the hourly rate from the JOB table to use in the calculation.

2. Calculate Estimated Gross.

If Reported Hours is not zero, the Estimated Gross amount will be calculated using this formula:

$$TL\_QUANTITY \times (COMPRATE + FACTOR\_RATE\_ADJ) \times FACTOR\_MULT$$

The Estimated Gross amount will be written to the Estimated Gross work table (TL_W2_EST_GRS) to be used in the final step below.



If a reported amount is populated in the Intermediate Payable Time table, this amount automatically becomes the Estimated Gross amount. No further calculation is needed.

3. Update IPT Estimated Gross.

This step populates the Estimated Gross field on the TL_IPT1 record with the Estimated Gross amount contained on the Estimated Gross Work table.

Step 10 - Process Adjustments

PeopleSoft Time and Labor supports two types of adjustments: normal and record-only.

- Changes you make to reported time through the weekly and elapsed time reporting pages are considered normal adjustments. The frozen flag associated with a payable time entry determines how these adjustments will be processed. (The frozen flag is set when time is approved, closed, or sent to payroll). Before the frozen flag is set, any changes you make will replace existing payable time entries. Changes made after the frozen flag is set will create offsetting entries that are sent to your payroll system.



For more information about the frozen flag, see Payable Status and Frozen Flags.

- Changes you make through the Record Only Adjustment page are considered record-only adjustments. You typically enter record-only adjustments when you cut a manual check for a time reporter and then want to go back and fill in the time history for that check. In record-only mode, the system does not create payable time, run the adjusted time through Time Administration, or send record-only adjustments to payroll.

This section describes the process that generates offsets for normal adjustments.

Understanding the Adjustment Process

An offset is the negative image of a current earnings for a given Date Under Report. (Date Under Report, or DUR, is the date for which time was reported.) The system creates offsets automatically when a DUR is adjusted. For example, suppose someone reports 8 hours of regular time for a given day, as the manager, you need to adjust this to 6 hours of regular time. If this 6 hours has already been processed by Payroll, the adjustment you make will create an earnings row to offset the original amount of 8 hours regular (-8 hours) and create a new earnings row containing the positive 6 hours of regular.

Offset records are created for every earnings for the day, regardless of whether earnings are modified or not. This implies that if a time reporter reported 8 hours of Regular, and 2 hours of OT, and the manager adjusts the Overtime amount, offsets would be created for the Regular (-8) and the OT (-2) hours. Positive entries are also created for all earnings in the amount of the final snapshot of that day.

Making Multiple Adjustments

If you adjust Time for a date under report several times, the process only looks at the most recent set of adjustments. For instance, in the example above, if the user makes another adjustment to the Date Under Report, the process will use the 6 hours of Regular to generate the offset (-6 hours), not the original 8 and the offset -8 earnings rows. Only the latest adjustments will be processed.

Determining When to Create Offsets

Adjustment processing occurs after rules and post-rules processes have been executed. Time Administration uses the following criteria to determine whether to create offsets for the data in an existing Payable Time record:

- The original time data for which the system is creating an offset or adjustment must have previously been closed or approved by the user, or processed by an external system such as Payroll or Project Costing.

You can determine whether an adjustment will create an offsetting entry by looking at the payable status (PAYABLE_STATUS). Note that Time and Labor does not create offsets when the Payable Status is estimated or needs approval.

Payable Status	Create Offsets?
AP—Approved	Y
CL—Closed	Y
SP—Sent to Payroll	Y
RP—Rejected by Payroll	Y
TP—Taken – Used by Payroll	Y
PD—Paid – Labor Distributed	Y
DL—Paid-LaborDiluted	Y
ES—Estimated-Ready for Payroll	N
NA—Needs Approval	N



For more information about Payable Status, see Payable Status and Frozen Flags.

- The system must be able to match the new Intermediate Payable Time record (the record that contains the new, adjusted data) with the original Payable Time record. In other words, the EmplID, Empl_Rec#, and Duration (DUR) associated with the new record and old record must match.

If these conditions are met, the system creates two new entries in Payable Time: one to reverse or offset (multiply by negative one) the original entry and the second to insert new data.

Example

The following example illustrates how this process works.

Original Payable Time data (TL_PAYABLE_TIME) that was reported, processed, and paid:

#	<i>DUR</i>	<i>TRC</i>	<i>QTY</i>	<i>Est_Gross</i>	<i>Lbr_Dist_Amt</i>	<i>Diluted_Gross</i>
1	1/2/00	Reg	4	40	40	40
2	1/2/00	Vac	4	40	40	40

New Data in Intermediate Payable Time (TL_IPT1):

#	<i>DUR</i>	<i>TRC</i>	<i>QTY</i>
1	1/2/00	REG	8

Offsets to Payable Time data (TL_PAYABLE_TIME) that were reported, processed, and paid:

#	<i>DUR</i>	<i>TRC</i>	<i>QTY</i>	<i>Est_Gross</i>	<i>Lbr_Dist_Amt</i>	<i>Diluted_Gross</i>
1	1/2/00	Reg	-4	-40	-40	-40
2	1/2/00	Vac	-4	-40	-40	-40

Step 11 - Update Payable Time

This process takes the final results of Intermediate Payable Time processing and inserts them into the Payable Time table, at which point the data becomes available to Payroll or other subscribers to Time and Labor.

Understanding the Difference Between Payable Time and Intermediate Payable Time

The function of Payable Time is to supply time data to external systems like Payroll or PeopleSoft Projects. By comparison, the function of Intermediate Payable Time is to make time data available internally for rules processing. The dates needed for rules processing may be considerably larger than the range of dates needed by your Payroll system or Projects. For this reason, the range of date transferred to Payable Time may not be identical to the range of dates originally loaded in the Intermediate Payable Time table.



For more information about the difference between the data sent to Intermediate Payable Time and the data transferred to Payable Time, see Step 3 - Build Rule Map.

Understanding How Time Administration Formats Payable Time

The Payable Time and Intermediate Payable Time (TL_IPT1) tables organize and format data differently. In contrast to Intermediate Payable Time, Payable Time attempts to sum data with the same attributes (TRC and Task) to create consolidated lines of data. For example, if two punch segments created for a single day have the same TRC in Intermediate Payable Time, Time Administration will add them to create a single row in Payable Time. The same is true of task data, whether tasks are reported positively or derived from task profiles. However, if there are separate TRCs or tasks for the rows of data in Intermediate Payable Time, the system preserves separate rows in Payable Time. If we look at how punch time is formatted in these tables, we can clearly see the difference.

Intermediate Payable Time Versus Payable Time

As illustrated in the table below, when Time and Labor transfers punch data to Intermediate Payable Time, it arranges the data into separate rows of in and out punches, calculates the duration between each in and out punch, and stores the resulting durations or time segments in TL_QUANTITY. Because each duration has a separate row in the table, you can write rules that act differently on different time segments based on punch type, task assignment, and so forth.

In the following example we'll first assume that detailed task information has been reported positively (time has already been assigned to Dept. A or B). We'll then look at a second example in which task assignments are derived from a task profile.

Example 1: Tasks are Positively Reported

Assuming that tasks are positively reported, rows in TL_IPT1 before rules have been executed would appear as shown below, where there is a record for each segment of time. Rules may later delete or add rows:

PUNCH_TYPE	PUNCH_B EGIN	PUNCH_E ND	TL_QUANTITY	TASK
In	8:00	10:00	2.00	Dept. A
Break	10:00	10:15	.25	Dept. A
In	10:15	12:00	1.75	Dept. A
Meal	12:00	13:00	1.00	Dept. A
In	13:00	15:00	2.00	Dept. B
Break	15:00	15:15	.25	Dept. B
In	15:15	17:00	1.75	Dept. B
Out	17:00			

After rules have been executed to assign TRCs to each time segment, TL_IPT1 would look like this:

PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY	TRC	TASK
In	8:00	10:00	2.00	Reg	Dept. A
Break	10:00	10:15	.25	Reg	Dept. A
In	10:15	12:00	1.75	Reg	Dept. A
Meal	12:00	13:00	1.00	Reg	Dept. A
In	13:00	15:00	2.00	Reg	Dept. B
Break	15:00	15:15	.25	Reg	Dept. B
In	15:15	17:00	1.75	Reg	Dept. B
Out	17:00				

After rules have been run, all like rows (those with the same TRC and task elements) for the same employee and date will be summarized and passed to Payable Time. Assuming that the meals and breaks in this example are paid, Payable Time would look like this:

TL_QUANTITY	TRC	TASK
5.00	Reg	Dept. A
4.00	Reg	Dept. B



In this example Payable Time creates two separate rows in TL_QUANTITY. This is because each is associated with a different task and cannot be summed.

Example 2: Task Data Derived From a Task Profile

In this example let's assume that task data has been generated through the use of a task profile, rather than positively reported, and that 25% of time is to be charged to Dept. A and 75% to Dept. B. Prior to running rules, TL_IPT1 will appear as follows:

PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY
In	08:00	10:00	2.00
Break	10:00	10:15	.25
In	10:15	12:00	1.75

PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY
Meal	12:00	13:00	1.00
In	13:00	15:00	2.00
Break	15:00	15:15	.25
In	15:15	17:00	1.75
Out	17:00		



When using task profiles, Time Administration refers to the instructions defined for the task profile to determine the correct allocation of time to tasks.

After rules have been executed, TL_IPT1 will appear as follows:

PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY	TRC	TASK
In	08:00	10:00	1.875 (7.5 total "In" hrs x .25)	Reg	Dept. A
Break	10:00	10:15	.125 (.5 hrs of total break time x .25)	Reg	Dept. A
Meal	12:00	13:00	.250 (1 "meal" hr x .25)	Reg	Dept. A
In	08:00	10:00	5.625 (7.5 total "In" hrs x .75)	Reg	Dept. B
Break	10:00	10:15	.375 (.5 hrs of total break time x .75)	Reg	Dept. B
Meal	12:00	13:00	.750 (1 "meal" hr x .75)	Reg	Dept. B

Assuming that breaks and meals are paid, Payable Time will appear as follows:

TL_QUANTITY	TRC	TASK
2.25	Reg	Dept. A

<i>TL_QUANTITY</i>	<i>TRC</i>	<i>TASK</i>
6.75	Reg	Dept. B



Although these examples include meals and breaks in the total time for the day, they would not typically be included in the *TL_QUANTITY* column used to determine the allocation of time to tasks. For example, if you were to use a “Default TRC” rule template to assign TRCs to reported time, you could specify which punches should get the default TRC (Punch Types = IN, ML (meal), BRK (break), OUT, and so on). Normally, you would only assign the default TRC to IN or XFER punch types, but not to ML or BRK. If ML or BRK don’t get a TRC, then they don’t get included in calculations in Intermediate Payable Time or Payable Time, but they could still be used to evaluate other miscellaneous rules.



For more information about selecting punch types to include in your calculations, see *Using Templates to Create Rules*.



The fact that Intermediate Payable Time contains a separate row for each time segment does not, for example, prevent you from writing a weekly overtime rule that sums all the segments in *TL_QUANTITY* for each day of the week in order to determine if a time reporter has met the requirement for overtime pay. You could even write a rule that sums all the hours in *TL_QUANTITY* for each segment in the week, deletes rows for individual segments, and writes the daily sum of hours back into *TL_QUANTITY*. However, you will probably want to maintain separate rows for each segment, because you may have other rules that process different segments of time differently depending on their punch type or task association.

Step 12 - Process Exceptions

This process updates the Exceptions table (*TL_EXCEPTION*) to include any new exceptions generated during the current batch run. When this table has been updated, you can go to the Manage Exceptions page to approve or clear out exceptions.

Specifically, the process does the following:

- Compares new exceptions created in the current run to the unresolved exceptions that exist in the *TL_EXCEPTIONS* table.
- Sets the *ACTION_DTTM* field on the *TL_EXCEPTIONS* table to *CurrentDateTime* for the exceptions that exist in both tables and deletes these exceptions from the working table.
- Updates the *TL_EXCEPTIONS* table by adding any new exceptions.

- Sets the status of resolved exceptions to “resolved.” Once Time Administration has updated the status of an exception to “resolved,” it refers to the SAVE_IND flag (save indicator) on the TL_EXCEPT_DEFN table for the Exception ID. If the save indicator for that exception is Y (Yes), Time Administration archives the exception. If the save indicator is N (No), Time Administration deletes it.



Time Administration does not process exceptions when it creates forecasted Payable Time.

Step 13 - Update TR Status

In this final step of the Time Administration run, the system resets the values in the TL_TR_STATUS record.



Time Administration does not update TR status when it creates forecasted Payable Time.

- In the case of each fully processed positive time reporter, the system sets the status (TA_STATUS) to “N” and the EARLIEST_CHGDT to null to indicate that the time reporters have already been processed and should not be reprocessed. If, after Time Administration has been run, time data is altered, or new time data is entered for a time reporter that affects the period just processed (or a prior period), the system will update TA_STATUS to “Y” and update EARLIEST_CHGDT to reflect the earliest date of reported time. The time reporter can then be reprocessed.
- In the case of exception reporters, the system resets the status (TA_STATUS) to “Y” rather than to “N” (TA_STATUS is always set to “Y” for exception reporters) and automatically moves the EARLIEST_CHGDT to the beginning of the next processing period. The time reporter will not be reprocessed unless new data is entered that causes the EARLIEST_CHGT field to be reset in the period that was just processed or in a prior period.



For more information about how the system sets the values in the TL_TR_STATUS record, see Updating Time Reporter Status.

Launching the Time Administration Process

You can launch the Time Administration process from the Time Administration Run Control page. If you have selected the Automatic Rules Run option on the TL Installation page, the process is also called automatically when you:

- Invoke the Submit process after entering time on the Rapid Entry page.
- Launch the GP Absence process from the GP Absence page, if Time and Labor is integrated

with Global Payroll. The GP Absence process calls Time Administration immediately after it retrieves absence data from Global Payroll.

Process Time Admin Page

Usage	Use the Process Time Admin page to select the time reporters and/or groups of time reporters you want to process. If you do not want to pass data to Payroll, and only want to forecast payable time, select the Forecast Payable Time option.
Object Name	TL_TA_RUNCTL
Navigation	Administer Workforce, Capture Time and Labor, Process, Time Administration
Prerequisites	If you would like the system to generate runtime statistics for the current run, use the Time Administration Options page to select the statistics you would like it to produce.
Access Requirements	Enter up to 30 alphanumeric characters, without spaces, for the Run Control ID.

Process Time Admin

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

☐ Forecast Payable Time
☒ Use Reported Time for POI
☐ Use Current Date

Process Date: 11/01/2000

Employees To Process				View All	First	1-2 of 2	Last
EmplID:	Empl Rcd #:	Group ID:	*Include/Exclude Indicator:				
KC0003	0	KUDY1	Include	+	-		

Process Time Admin page (Process Time Administration page)

Run Control ID

This field is populated automatically, based on the **Run Control ID** you selected in the entry dialog box.

Forecast Payable Time

Select **Forecast Payable Time** if you do not want to send the results of the Time Administration Batch run to Payable Time, but are interested in using the results for budgeting or other business purposes. You might also use this feature to test new rules associated with a new contract. You can forecast payable time repeatedly without having to reset TA Status until results are accurate.

If you select **Forecast Payable Time**, the **Process Period with this Date** field becomes available (defined below). In order for the system to forecast time for current and future periods accurately, the **Use Reported Time for POI** check box must be selected.

Note. Forecasting Payable Time does everything that creating Payable Time does, except process exceptions (TL_TA001200) and update time reporter status (TL_TA001300). It also ignores the EARLIEST_CHGDT and TA_STATUS.

Use Reported Time for POI

This field enables you to determine dynamically if Time Administration should consider dates related to newly reported punch or elapsed time when creating the period of interest. If this check box is selected (default setting), the system will consider all reported time when creating the Period of Interest. Consequently, if the time reporter has reported time for a date that is greater than the initial Period of Interest end date, the greatest date from reported time becomes the initial POI end date. However, if this check box is cleared, the system will only use the earliest change date and current workgroup period to determine the period of interest, and will not consider time from future periods.

For example, suppose that on 28 February you are processing time for the months of January and February and a time reporter has reported future vacation time for March. If you want the system to include the future reported time in its calculations, you would make sure that this check box is selected. Or, if you want the system to ignore the future reported time and only process the current and previous month's time, you would clear this check box.

Use Current Date

This field is used when you want to create Payable Time. Select **Use Current Date** if you would like the system to use the current (system) date to select time reporters for processing. Any time reporters with an Earliest Change Date (from the TR Status table) that is equal to or less than the date entered on the page will be selected for the run. Selecting this option deactivates the Process Date field.

For complete information about how the system uses the **Current Date** to select time reporters for processing, see Step 1 - Determine Time Reporters to Process.

Process Date

Use this field if you are creating Payable Time, and you want to use a date other than the current (system) date to select time reporters for processing. For example, if you enter a new period before processing the previous calendar period, you could change the date on the run control to the last day of the previous pay period, and the run control would select the appropriate time reporters for that period. That is, only time reporters whose status (TA_STATUS) is "Y" and who have data to process in the previous period (whose EARLIEST_CHGDT is equal to or less than the last day of the previous period) will be selected. Time reporters who have unprocessed time in the current period only will be not selected.

Note. The system date automatically defaults into the **Process Date** field, but can be modified.

For complete information about how the system uses the **Process Date** to select time reporters for processing, see Step 1 - Determine Time Reporters to Process.

Process Period with this Date

This field becomes available only when you select **Forecast Payable Time**. Enter the date you want to use to select a period for processing. The system determines the correct period to process as follows:

For any time reporters you select for processing in the **Employees to Process** scroll area, the system locates the workgroup (or time reporting) period intersected by the “Process Period” date, and processes time for that period only (it does not select or exclude time reporters based on whether their earliest change date is less than or equal to this date. It simply processes any time reporter with time in this period).

Note. If a time reporter in the period for which you are forecasting payable time is an exception reporter, the system uses scheduled time in its calculations—unless the exception reporter has entered time positively. In this case the positively reported time takes priority over the scheduled time. If a time reporter in the period for which you are forecasting payable time is a positive time reporter, the only time the system can process is positively reported time—unless the time reporter has a schedule.

Employees To Process

Use the **Employees To Process** group box to select the time reporters you want to process or exclude from the Time Administration run. You can enter Group IDs for entire workgroups, exclude certain individuals from those workgroups while processing everyone else, or select individuals from one or more workgroups to avoid processing large numbers of time reporters.

EmplID

Select the Employee ID for the time reporter you want to include or exclude from the run.

Empl Rcd #

Select the Employee Record Number for the time reporter’s job you want to include or exclude from the run.

Group ID

If you want to include or exclude an entire group of time reporters, select the Group ID in this field.

Include/Exclude Indicator

Select **Include** to include the time reporters you identified in the fields to the left.

Select **Exclude** to exclude the time reporters you identified in the fields to the left.

Run

Click **Run** to run this request. Process Scheduler runs the TL_TA process at user-defined intervals.

For more information about Process Scheduler, see PeopleSoft Payroll PeopleBooks in your PeopleTools documentation.

Generating and Viewing Runtime Statistics

Use the Time Administration Options page to select the runtime statistics and other data you want the system to generate when you run the Time Administration process. After a batch run, you can view the data for troubleshooting purposes. For example, you could use the statistics generated during a run to see how much time it took to load the Intermediate Payable Time tables, and then determine whether you're loading an excessive amount of data.

Time Admin Options Page

Usage	Use the Time Admin Options page to select the runtime statistics, batch data, and rule information you want the system to generate during each Time Administration run. You also specify the number of runs for which you want to store data.
Object Name	TL_TA_OPTIONS
Navigation	Define Business Rules, Define Time and Labor Rules, Setup1, Time Admin Options
Prerequisites	Run the Time Administration process.
Access Requirements	None

Time Admin Options

Time Admin Runtime Statistics

- ☒ Store Macro Time Admin Stats
- ☒ Store Batch Stats
- ☒ Store Section Stats

Time Admin Save Options

- ☒ Store Copies of the Batches
- ☒ Store Copies of the Rule Map

Keep Last (n) Time Admin Runs: 20

Time Admin Options page (Time Administration Options page)

Time Admin Runtime Statistics

Use the following three options to define the runtime statistics you would like the Time Administration process to generate:



If you elect to store information at the detail level, the system automatically stores information at all higher levels. For example, if you select **Store Batch Stats**, you will also be able to access macro level Time Administration statistics for the current run. You will not, however, be able to access detailed, section level statistics.

Store Macro Time Admin Stats

Select this option if you would like to generate high level statistics for the current run as a whole, information about when the Time Administration process started and stopped, how many rows were processed, and so forth.

Store Batch Stats

Select this option if you would like to generate more detailed statistics on a batch by batch basis. For instance, the time taken to process each batch, and the start and end date of the period of interest for the batch.

Store Section Stats

Select this option if you would like to generate detailed information for each batch at the section level, in other words, at the level of each of the steps or Application Engine subprocesses that make up the Time Administration process. For example, selecting this option allows you to generate and view statistics on such subprocesses as Punch Matching, Generate Intermediate Payable Time, and so forth.



If you elect to generate runtime statistics on your batch runs, you can view the statistics using the RSL Maintenance page and the linked Batch Stats page and AE Section Stats page.

Time Admin Save Options

Use the fields in this group box to specify if you want to generate information about the batches and rules processed during the run. You can also specify how many previous runs of statistics, batch data, and rules data you want to store.

Store Copies of the Batches

Select this check box if you want to generate data for each batch of data processed.

Store Copies of the Rule Map

Select **Store Copies of the Rule Map**, if you want to store the Rule Map and see what rules you ran, the order in which they ran, and so forth.

Keep Last (n) Time Admin Runs

Enter the number of previous Time Administration runs for which you want to store runtime statistics, batch and rules data. For example, if you enter a 3 in this field, the system will keep the data for the last three runs.



If you elect to store copies of the batches or rule map, you can view the information using the Archived Batches page and the Rule Map Archives page.

Viewing Runtime Statistics

Once you've defined the statistics you want to generate using the Time Admin Options page, and have run the Time Administration process, you can navigate to the RSL (runtime statistics library) Maintenance page to view the run statistics. Two linked pages, the Batch Statistics page and the AE Section Stats page display additional statistics.

This section describes the information displayed on each of these pages.

RSL Maintenance Page

Usage	The RSL Maintenance page displays the macro runtime statistics for the Time Administration process.
Object Name	TL_TA_RSL_MAINT
Navigation	Administer Workforce, Capture Time and Labor, Inquire, View Runtime Statistics
Prerequisites	One or more of the Time Admin Runtime Statistics options must be selected on the Time Admin Options page. Statistics are generated when you run the Time Administration process.
Access Requirements	None

RSL Maintenance

Remove All

Remove Selected

Find View All First 1 of 1 Last										
Delete Row	Process Instance	Forecast Payable Time	Run Time	IPT Row Count	Payable Time Row Count	Forecasted Time Row Count	Exceptions Row Count	Batch Stats	AE Section Stats	
☐	0	☐	00.00.00.000000	0	0	0	0	Batch Stats	AE Section Stats	
View All First 1 of 1 Last										

RSL Maintenance page (Runtime Statistics Library Maintenance page)

Deleting Rows of Statistics

You can delete all or selected rows of statistics from the RSL Maintenance page and the linked Batch Stats and AE Section Stats pages using the **Remove All** and **Remove Selected** buttons, and the **Delete Row** check box described below.

- To delete all statistics that appear on this page and the linked Batch Stats page and AE Section Stats page, click the **Remove All** button.
- To delete selected rows of statistics and the corresponding Batch Stats and AE Section Stats pages, select the **Delete Row** checkbox next to each row you want to delete, then click **Remove Selected**.

The Statistics

Process Instance	The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.
Forecast Payable Time	This check box is selected if you chose the Forecast Payable Time option on the Time Administration run control page.
Run Time	This is the amount of time it took to run Time Administration.
IPT Row Count	This is the number of rows created in Intermediate Payable Time.
Payable Time Row Count	This is the number of rows created in Payable Time.
Forecasted Time Row Count	This is the number of rows created in Forecasted Payable Time.
Exceptions Row Count	This is the number of exceptions generated when Time Administration was run.
Batch Stats	Click the Batch Stats button to access the Batch Stats page, where you can see additional information about the batch.
AE Section Stats	Click the AE Section Stats button to access the AE Section Stats page, where you can see the runtime for each section in the batch.

RSL Maintenance Page: TA Run-Time Stats: Batches Page

Usage	The Batch Stats page displays the run time, start and end dates of the period of interest covered by the batch, and the number of time reporters in the batch.
Object Name	TL_TA_RSL_BATCH

Navigation	Administer Workforce,Capture Time and Labor, Inquire, View Runtime Statistics
Prerequisites	The Store Batch Stats or Store Section Stats option on the Time Admin Options page must be selected. Statistics are generated when you run the Time Administration process.
Access Requirements	Click the Batch Stats link on the RSL Maintenance page.

TA Run-Time Stats: Batches					
Batch Statistics Find View All First 1 of 1 Last					
Process Instance	Batch Number	Run Time	Period of Interest Start	Period of Interest End	Time Reporter Count
0	0	00.00.00.000000			0

Batch Statistics page

Process Instance	The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.
Batch Number	This number uniquely identifies the batch.
Run Time	The amount of time it took to process the batch.
Period of Interest Start	The Period of Interest start date.
Period of Interest End	The Period of Interest end date.
Time Reporter Count	This is the number of time reporters processed in the batch.

RSL Maintenance Page: TA Run-Time Stats: AE Sections

Usage	The AE Section Stats page displays the run time for each section in the selected batch.
Object Name	TL_TA_RSL_SECT
Navigation	Administer Workforce, Capture Time and Labor, Inquire, View Runtime Statistics
Prerequisites	The Store Section Stats option on the Time Admin Options page must be selected. Statistics are generated when you run the Time Administration process.
Access Requirements	Click the AE Section Stats link on the RSL Maintenance page.

TA Run-Time Stats: AE Sections			
Application Engine Section Statistics			Find View All First 1 of 1 Last
Process Instance	Batch Number	Section Name	Run Time
0	0		00.00.00.000000

Application Engine Section Statistics page

Process Instance	The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.
Batch Number	The number that uniquely identifies the batch.
Section Name	This is the section name, that is, the name of the subprocess for which you have generated statistics.
Run Time	This is the amount of time it took to run the subprocess or section for which you have generated statistics.

Viewing Batch Data

You can view detailed information about the batches processed during a Time Administration run through the Archived Batches page and the linked Archived Batch Details page.

Batch Archives Page

Usage	The Archived Batches page lists each time reporter processed in each batch. It also identifies the period of interest, workgroup, and rule program used during the process.
Object Name	TL_TA_ARCH_BAT
Navigation	Administer Workforce, Capture Time and Labor, Inquire, Archived Batches
Prerequisites	The Store Copies of the Batches option on the Time Admin Options page must be selected. Statistics are generated when you run the Time Administration process.
Access Requirements	None

Batch Archives										
Remove All			Remove Selected							
Find View All First 1 of 1 Last										
Delete Row	Process Instance	Batch Number	Run Control ID	EmplID	Empl Rcd Nbr	Start Date	End Date	Workgroup	Rule Program ID	View Details
☐					0					View Details
View All First 1 of 1 Last										

Batch Archives page

Deleting Rows of Statistics

You can delete all or selected rows of statistics from the Archived Batches page and the linked detail page using the **Remove All** and **Remove Selected** buttons, and the **Delete Row** check box described below.

- To delete all statistics that appear on this page and the linked detail page, click the **Remove All** button.
- To delete selected rows of statistics and the corresponding detail pages, select the **Delete Row** checkbox next to each row you want to delete, then click **Remove Selected**.

The Statistics

Process Instance	The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.
Batch Number	The number that uniquely identifies the batch.
Run Control ID	The run control ID associated with the batch.
EmplID	The time reporter's employee ID number.
Empl Rcd Number	The time reporter's employee record number.
Start Date	The Period of Interest start date.
End Date	The Period of Interest end date.
Workgroup	The name of the workgroup for which the statistics were generated.
Rule Program ID	The rule program associated with the batch.
View Details	Click the View Details link to access the Archive Batch Detail page.

Batch Archives: Archive Batch Detail Page

Usage	The Batch Detail page shows the effective date of the time reporter and workgroup, and the original end date.
Object Name	TL_TA_ARCH_BAT_SEC
Navigation	Select the View Details button on the Batch Archives page.

Archive Batch Detail

Process Instance:	Workgroup:
Batch Number:	Wrkgrp Effdt:
EmplID:	Rule Program ID:
Empl Rcd Nbr: 0	Rulepgm Effdt:
Empl Effdt:	
Start Date:	
End Date:	
Orig End Dt:	
Run Control ID:	

Batch Archives: Archive Batch Detail page

Many of the fields on the Archived Batch Details pages also appear on the Batch Archives page. Additional fields include:

Empl Effdt

The date on which the time reporter was enrolled in PeopleSoft Time and Labor.

Orig. End Dt (original end date)

The original end date represents the end date of the initial period of interest the Time Administration process identified for the time reporter.

For payable time, the system refers to the period ID associated with the time reporter's workgroup. It then identifies the start and end dates of the period in which the earliest change date falls. This end date becomes the original end date.

For forecasted payable time, the system follows a similar process to determine the original end date, but substitutes the earliest change date with the date entered in the **Process Date** field on the Time Administration run control page.

Wrkgrp Effdt (workgroup effective date)

The effective date of the workgroup row that was effective for this run and for this time reporter.

Rulepgm Effdt (rule program effective date)

The effective date of the rule program row that was effective for this run and for this time reporter.

Viewing Rules Data

You can view detailed information about the rules processed during a Time Administration run through the Rule Map Archives page and the linked Archived Rule Map Details page.

Rule Map Archives Page

Usage	The Rule Map Archives page lists each rule that was processed for each batch in a run, the rule priority, associated rule program, and time period.
Object Name	TL_TA_ARCH_RMAP
Navigation	Administer Workforce, Capture Time and Labor, Inquire, Archived Rule Maps
Prerequisites	The Store Copies of the Rule Map option on the Time Admin Options page must be selected. Statistics are generated when you run the Time Administration process.
Access Requirements	None

Rule Map Archives

Remove All

Remove Selected

Delete Row	Process Instance	Batch Number	Priority	Rule ID	Start Date	End Date	Rule Program ID	Time Period ID	View Details
☐									View Details

View AllFirst1 of 1Last

Rule Map Archives page

Deleting Rows of Statistics

You can delete all or selected rows of statistics from the Rule Map Archives page and the linked detail page using the **Remove All** and **Remove Selected** buttons, and the **Delete Row** check box described below.

- To delete all statistics that appear on this page and the linked detail page, click the **Remove All** button.
- To delete selected rows of statistics and the corresponding detail pages, select the **Delete Row** checkbox next to each row you want to delete, then click **Remove Selected**.

The Statistics

Process Instance	The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.
Batch Number	The number that uniquely identifies the batch.
Priority	The priority of the rule within the rule program.
Rule ID	The rule that was executed.
Start Date	The Period of Interest start date.

End Date	The Period of Interest end date.
Rule Program ID	The rule program associated with the rule.
Time Period ID	The time period applicable to the rule program. The time period ID (associated with the time period calendar) determines the date range for the selection criteria of the rule.
View Details	Click the View Details link to access the Archive Rule Map Detail page.

Rule Map Archives: Archive Rule Map Detail Page

Usage	The Archive Rule Map Detail page shows the effective date of the time reporter and workgroup, and the original end date.
Object Name	TL_TA_ARCH_RMP_SEC
Navigation	Click the View Detail button on the Rule Map Archives page.

Archive Rule Map Detail

Process Instance:	Start Date:
Batch Number:	End Date:
Priority:	
Rule ID:	Section:
Workgroup:	Rule Program ID:
Wrkgp Effdt:	Rulepgm Effdt:
Time Period ID:	
Run Control ID:	

Archive Rule Map Detail page

Many of the fields on the Archived Batch Details pages also appear on the Rule Map Archives page. Additional fields include:

Workgroup	The workgroup for which the rule was executed.
Wrkgp Effdt	The effective date of the workgroup for which the rule was executed.
Section	The Application Engine (AE) section that contains the code for the rule.
Rulepgm Effdt	The effective date of the rule program.

Tips and Tricks for Batch Processing



Note. The information contained in this topic assumes that you are familiar with the explanation of how Time Administration calculates the period of interest, as well as the material on the relationship between the period of interest, Intermediate Payable Time, and Payable Time.

Q. How can I process both a prior period adjustment for an exception reporter *and* the “current” time reporting period if the current period does not fall within the period of interest for batch processing, and how can I avoid skipping periods when I run Time Administration in a situation like this?

A. Since Payable Time cannot be created for a date or a period that is not contained within the period of interest (and which is therefore not included in Intermediate Payable Time), the current period may need to be processed in a separate run from the prior period adjustment. The following example illustrates why this might occur, and how to avoid skipping a period when you run Time Administration.

Example: Creating Time for an Exception Reporter with a Prior Period Adjustment

In this example let’s assume the following:

- You are processing an exception time reporter.
- The time reporter belongs to a workgroup with a monthly rule in their rule program.
- The last period processed for this time reporter was Week 6 (the current week to be processed is Week 7). After Week 6 was processed, the earliest change date was automatically reset to the first day of the next period—that is, Week 7 (as explained in the section Updating TL_TR_STATUS When There Is New or Modified Data).
- After Week 6 is processed, the time reporter makes a change to prior period time—let’s say he neglected to report a vacation day at the beginning of Week 3, and then does so after Week 6 is processed. Because of this, the earliest change date for the time reporter moves from the beginning of Week 7 to the start of Week 3.
- After our time reporter reports new data in the prior period, the system administrator runs Time Administration. When the process is launched, the Time Administration defines the initial period of interest as the time reporting period intersected by the earliest change date (Week 3 in our example). The system then expands the period of interest to create time for the monthly rule, giving us a final period of interest that begins on 1 January and ends on 31 January. Because there is no positively reported time for periods after 31 January, the final period of interest does not extend into the current month or even to the current week (Week 7). This means that Payable Time for the time reporter cannot be created, during this run of Time Administration, for the current period (Week 7), as the data for this period does not fall within the period of interest (and therefore does not exist in Intermediate Payable Time). Payable Time will, however, be created for the month of January.

Issue:

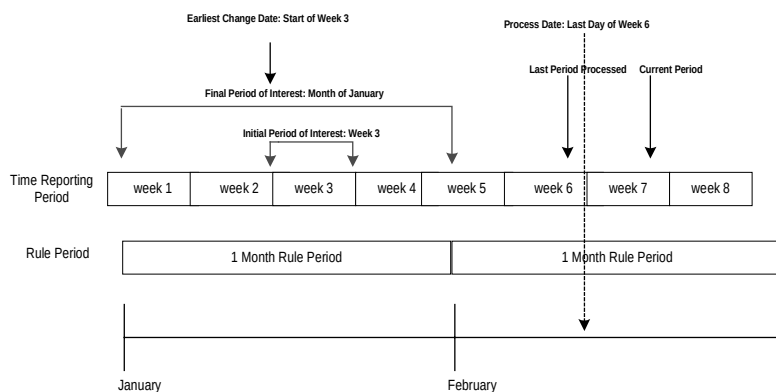
In a situation like this, you will very likely still want to create Payable Time for the time reporter in Week 7, which is the “current” period (the period in the present you want to process.) How can you do this, given that the period of interest does not extend into the current month? (Remember, you cannot move time into Payable Time unless it falls within the period of interest, and is included in Intermediate Payable Time.) And how can you avoid skipping a time reporting period given that the earliest change date is automatically reset (after processing an exception reporter) to the start of the period immediately following the one intersected by the system date or process date used in the last Time Administration run?

Solution:

After processing an exception reporter, Time Administration automatically resets the earliest change date to the first day of the next time reporting period (the one following the period intersected by the process date or system date used in the previous run). As you can see from the illustration below, the process date used for the initial run (the one that created prior period time in January) is the last day of Week 6. Because of this, Time Administration resets the earliest change date to the first day of Week 7 (as explained in the section Updating TL_TR_STATUS When There Is New or Modified Data). This means that the next time Time Administration is run, the system will recognize that it must process Week 7. So in a situation like this (in which there is a prior period adjustment, and the period of interest does not include the “current” period), if you want to be sure that the earliest change date is reset to the start of the new period you want to process, you can initially set the process date to the last day of the last period processed. Once the earliest change date is reset, you can move the process date into your “current” period (or a future period if you want).



Notice that if the process date for the initial run in this example (the one that created prior period time in January) had been set to Week 7, the earliest change date for our time reporter would have been reset to the start of Week 8—meaning that Week 7 would have been “skipped.” So you should be sure that you set your process date correctly.



Processing both a past and a current period

Understanding Payable Time

Payable time is created through the Time Administration process and is the end product of PeopleSoft Time and Labor. It can be generated in advance from schedules or during the course of the pay period from reported time entries. It represents the quantity of work performed (in hours, dollars, or units), the time reporting code that controls how the time reporter is paid, and the tasks to which time was reported, if applicable.

When you integrate PeopleSoft Time and Labor with other applications, payable time can be sent to or retrieved by those applications for further processing. For example, if you integrate Time and Labor with PeopleSoft Global Payroll or Payroll for North America, your payroll system can pull payable time into its pay runs, compensate time reporters, and then return the calculated costs to Time and Labor. If you're using PeopleSoft Projects, you can send payable time with estimated or actual costs to Projects for use in project planning, budgeting, billing, and other activities.

This section describes the various stages through which payable time can pass, the effect of adjustments on payable time, and when other applications can access payable time.



For more information about integrating PeopleSoft Time and Labor with your payroll system, see *Integrating with Payroll Applications*. For more information about integrating PeopleSoft Time and Labor with PeopleSoft Projects, see *Integrating with PeopleSoft Financials*.

Payable Status and Frozen Flags

Payable time has three attributes that determine when payable time is available to other applications and how the Time Administration process handles adjustments made to payable time. The three attributes are:

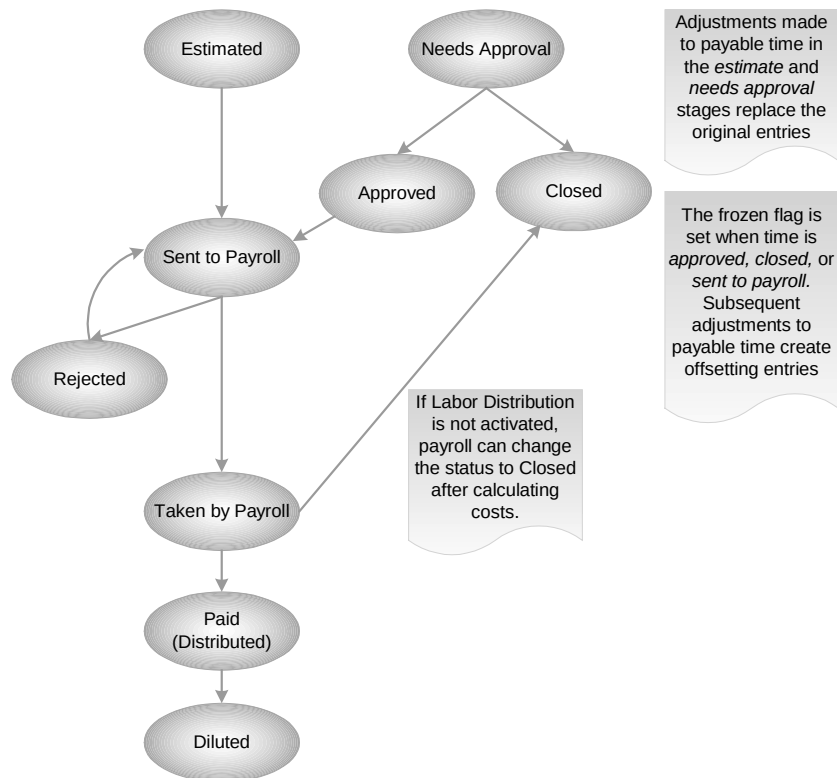
- **Payable status.** Payable time goes through many stages, most of which relate to the transmission of payable time records from PeopleSoft Time and Labor to your payroll system, as well as the transmission of cost data from your payroll system to Time and Labor. Payable status records the progress of payable time through these stages.
- **Frozen flag.** Reported time is subject to various changes. Time reporters can enter new time and change previously entered time; managers can respond to exceptions and enter additional details. These and other actions can result in new payable time entries and may impact existing entries. The frozen flag determines how the system handles any changes that are made to payable time entries. An adjustment made to an entry before its frozen flag is set will result in

the replacement of the original entry by the new entry. An adjustment made after the frozen flag is set will cause the system to create a new entry and an offsetting entry that reverses the original entry.

- **Frozen date.** The frozen date identifies when the frozen flag was set.

Together, the payable status, frozen flag, and frozen date determine whether an entry of payable time can be sent to Payroll or published (made available) to other applications. The values of the three attributes reside in the payable time tables.

The following diagram shows each stage of payable time:



Stages of payable time

Note that the frozen flag and frozen date are set when the payable status changes to *approved*, *closed*, or *sent to Payroll*. Until this time, any changes made to reported time can result in new payable time entries that replace the original entries. Any changes made after the frozen flag is set causes Time Administration to create offsetting entries, leaving the original entries intact.

Payable Time Statuses

Status	Description	When Published?
Estimated – Ready for Payroll	This is the first stage of payable time created by the Time Administration process, unless you've activated the Needs Approval option on the Workgroup page. It includes cost estimates calculated by Time Administration if you've selected the Calculate Estimated Gross option on TL Installation Page. Time Administration updates the original payable time whenever you change reported time that relates to payable time with a payable status of Estimated-Ready for Payroll.	Published to systems that subscribe to the Estimates message.
Needs Approval	This stage is like estimated payable time except that the time must be approved before it can be sent to a payroll system. You approve time using the Approve Payable Time page. Time Administration updates the original payable time whenever you change reported time that relates to payable time with a payable status of Needs Approval.	Published to systems that subscribe to the Estimates message.
Approved – Goes to Payroll	Approved payable time can be sent to your payroll system. When payable time reaches the approved stage, the system sets the frozen indicator on. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Approved-Goes to Payroll..	Not applicable.

Status	Description	When Published?
Closed	Payable status is set to closed when any of the following conditions are met. (When payable time reaches the closed stage, the system turns on the frozen indicator.) • The Send to Payroll option is not activated for the time reporter (on the Create Time Reporter page). • The Send to Payroll option is not activated for the time reporting code (on the TRC Setup page). • The payable time represents a record adjustment made through the Adjust Paid Time page. • The payable time has been taken by Payroll, but it will not be labor distributed or diluted because you did not select the Labor Distribution and Dilution options on the Pay System page. (In this case, you'll see the Pay System code and Pay Request Number on the View Payable Time Details Page.) Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Closed.	Published to systems that subscribe to the Actual message.
Sent to Payroll	Payable time is in a Sent to Payroll stage from the moment it's sent to Payroll to the time Payroll either takes or rejects the entry. When payable time reaches the Sent to Payroll stage, the system turns on the frozen indicator. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Sent to Payroll.	Not applicable.
Rejected by Payroll	Time that Payroll has refused. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Rejected by Payroll.	Not applicable.

Status	Description	When Published?
Taken - Used by Payroll	Time has been accepted by Payroll. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Taken – Used by Payroll.	Not applicable.
Paid-Labor Distributed	Time that has actual costs from Payroll applied by the Labor Distribution process. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Paid-Labor Distributed.	Published to systems that subscribe to the Actual message.
Paid-Labor Diluted	Time that has actual costs from Payroll applied by the Labor Distribution process and Labor Dilution process. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Paid-Labor Diluted.	Published to systems that subscribe to the Actual message.



For more information about publishing payable time, see PeopleSoft Projects Integration. For more information about how Time Administration processes adjustments to payable time, see Step 10 - Process Adjustments in Understanding Batch Processing.

Publishing Estimated and Actual Payable Time

Payable Time With Estimated Costs

Each entry of payable time can have both an estimated and actual cost associated with it. If you've selected the Calculate Estimated Gross option on the TL Installation page, Time and Labor will calculate the estimated cost of payable time when you run the Time Administration process. At the same time, it will assign the entry a payable status of *estimate* or *needs approval*, as appropriate.

Estimated payable time is available to any system that wants an early estimate of costs. PeopleSoft Time and Labor publishes, on request, all payable time that has not had actual costs applied, including payable time with a status of *estimate*, *needs approval*, *approved*, *sent*, *rejected*, and *taken*. It does not include payable time in a *closed*, *paid*, or *diluted* stage.

Receiving systems should be prepared to replace any previously collected estimates with whatever comes from PeopleSoft Time and Labor and not try to reconcile old with new. Whatever comes from PeopleSoft Time and Labor for a given time reporter on a given date should replace all other entries for that time reporter and date.



Estimated payable time is not the same as forecasted payable time. Forecasted payable time is stored in a separate table and does not go through the stages associated with payable time.



For more information about forecasted payable time, see Time Administration Run Control Page in Batch Processing. For more information about how Time Administration calculates estimated costs, see Calculate Estimated Gross in Batch Processing. For more information about publishing estimated costs to PeopleSoft Projects, see your PeopleSoft 8 Application Fundamentals for HRMS PeopleBook.

Payable Time With Actual Costs

If you integrate PeopleSoft Time and Labor with your payroll system, your payroll system can calculate actual costs associated with payable time entries and send them back to Time and Labor. Payable time entries with a payable status of *closed*, *paid-labor distributed*, or *paid-diluted* reflect actual costs. Payable time at any earlier stage reflects only estimated costs.

PeopleSoft Time and Labor automatically publishes payable time in *paid*, *diluted*, or *closed* stages after actual costs have been applied and after labor dilution.

If Payroll must recalculate paychecks after the pay period is closed, the payroll system can send PeopleSoft Time and Labor new actual costs. Time and Labor then updates the payable time, publishes a message reversing the original amounts, and publishes the new actual costs. Labor Distribution can be rerun and Time and Labor will publish to PeopleSoft Projects the difference between the original and new costs.



For more information about how integrating PeopleSoft Time and Labor with your payroll system, see Integrating with Payroll Applications. For more information about publishing actual costs to PeopleSoft Projects, see Integrating with PeopleSoft Financials.

Currency Codes in Payable Time Table

The Payable Time table (TL_PAYABLE_TIME), includes two fields for currency code: Currency Code 1 and Currency Code 2.

- Currency Code 1 reflects the currency used to calculate the estimated gross costs.
- Currency Code 2 reflects the currency the payroll application used to calculate actual costs. When payable time is closed because it does not go to a payroll system or does not get labor-distributed, the Currency Code 2 field reflects the same currency code used to calculate estimated gross.

Payable Time Fields

The following table lists the fields maintained for each entry of payable time with TL_PAYABLE_TIME:

Field Name	Description
Emplid	Employee Identification
Empl_Rcd#	Employee record number
DUR	Date to which this time was reported.
Seq_Nbr	Unique serial number. The link for payroll update and distribution.
Task_Prfl_Tmplt_ID	Task template for task elements.
TRC	Time reporting code for this time.
TL_Quantity	Hours, Amount or Units reported by the time reporter.
Shift_ID	The shift under which the original time was reported.
Billable_Ind	Billable Indicator
Override_Rate ¹	Override rate entered directly by authorized individual or derived through rules.
Comp_RateCd	Alternate rate code to be used with this time. Entered directly by authorized individual or derived through rules.
Country	Country to be used with this time. Entered directly by authorized individual or derived through rules.
State	State to be used with this time. Entered directly by authorized individual or derived through rules.
Location	Location to be used with this time.
Locality	Locality to be used with this time. Entered directly by authorized individual or derived through rules.
Est_Gross	The estimated gross pay for this entry.
Currency_Cd	The monetary unit in which Reported, Override_Rate and Est_Gross are stated.
Lbr_Dist_Amt	Actual gross from Payroll spread evenly across all relevant TRCs in the period.
Diluted_Gross	Labor Distribution Amount after dilution.
Currency_Cd2	The monetary unit in which the Lbr_Dist_Amt and Diluted_Gross are stated.
Payable_Status	An indicator that identifies at what stage is this time.
Pay_System	Payroll System that processed this entry.

Field Name	Description
Payroll_Req_Num	Sequential number of payroll request.
Frozen_Sw	Indicates that this record will not be changed by Time Admin.
Frozen_Date	Date the Frozen Flag was set.
Record_Only_Adj	Record Only adjustments.
Publish Sw	If row was published.
Actual_Pub_Date	Date published as final paid time.
Oprid	Operator ID that approved the time.
Apprv_Prcs_Dttm	Date time was approved.
Source_Ind	Source Indicator: Offset, System Generated or User Reported (Record Adjustments)
Orig_Seq_Nbr	The original sequence number if this is an offset.
Company	Company Code
Business_Unit_PC	Projects Business Unit
Business_Unit	HR Business Unit
DeptID	Department ID
Product	Product Code
Project_ID	Project ID
Task	Task code
Customer	Customer code
Acct_CD	Account Code
Resource_Type	Resource Type
Resource_Category	Resource Category
Resource_Sub_Cat	Resource Sub Category
Activity_ID	Activity ID
User_Field_1	User Field 1
User_Field_2	User Field 2
User_Field_3	User Field 3
User_Field_4	User Field 4
User_Field_5	User Field 5
Business Unit PF	PeopleSoft Enterprise Performance Management Business Unit

Field Name	Description
SetID_Dept	Department SetID
SetID_Resource	Resource SetID
SetID_Activity	Activity SetID

Payable Time Reports

You can generate a Payable Status report that shows the payable status for each entry of payable time during the range of dates you specify. You can include all time entries or specify the payable statuses in which you're interested. You can also choose the language in which the report is produced.



For more information about the Payable Status report, see your PeopleSoft 8 Application Fundamentals for HRMS PeopleBook.

CHAPTER 13

Reporting Time

This section describes how you can use time reporting templates and rapid reporting templates to define time entry pages for your time reporters. It also describes how data entry clerks can use the rapid reporting function to quickly enter time for multiple time reporters on the same page.

- Use time reporting templates to establish easy-to-use, self-service pages that your time reporters can use to enter time for the current period. You can also change time that time reporters have positively reported, or that the system has generated using time reporter schedules and system defaults.
- Use rapid reporting templates to design time entry pages for fast reporting. Limited editing occurs during data entry, so users can operate at top speed. Full validation occurs during a separate Submit process.

Understanding Time Reporting

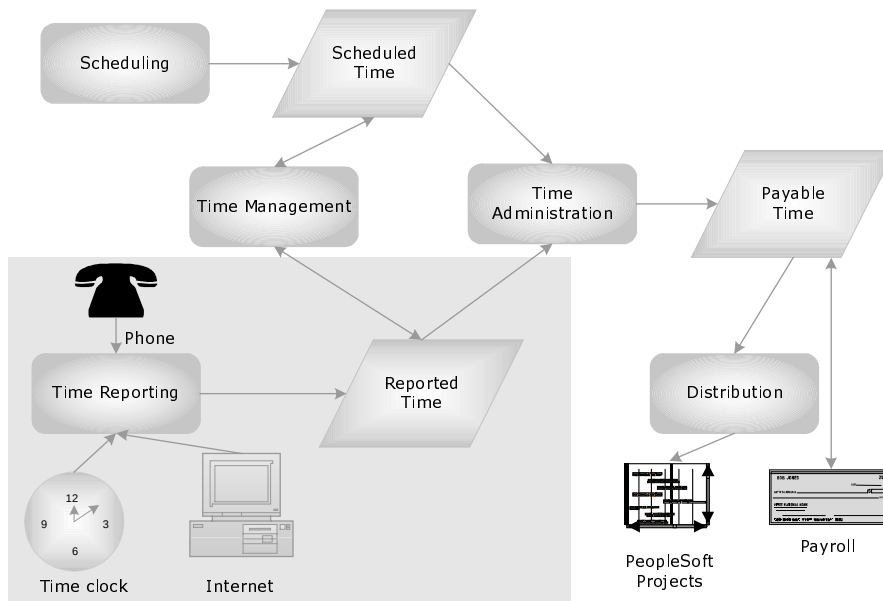
As you can see from the illustration below, you can report time using a time clock device, such as a time clock or phone, or through time reporting pages you access through the internet. Time and Labor can also generate time automatically through the use of schedules.



If your organization uses PeopleSoft Expenses along with PeopleSoft Mobile Time and Expense, time reporters can enter time while out of the office and upload it to Expenses, which can send the reported time to Time and Labor. For more information about this feature, see PeopleSoft Expenses with Mobile Time and Expense.

You can view and modify all time entries—regardless of their source—using PeopleSoft Time and Labor’s time management pages.

When you run the Time Administration process, the system converts reported time to payable time that can be sent to your payroll system, PeopleSoft Projects, and other applications.



Reported time is converted to payable time that can be used by other applications

Creating Time Reporting Templates

With PeopleSoft Time and Labor, you have complete control over the design of your time reporting pages. You use the Time Reporting Template page to select the fields you want to appear on the Weekly Punch Time Reporting and the Weekly Elapsed Time Reporting self-service pages. You also indicate which data entry fields are required and which fields are optional.

Selecting Task Data

To select the types of task data you want time reporters to provide, you use the task template rather than the time reporting template. Then, you simply attach the task template to the time reporting template. This feature makes it easy for you to assign the same set of task reporting requirements to more than one time reporting template.

Assigning Time Reporting Templates

You must assign a weekly punch time reporting template and a weekly elapsed time reporting template to each taskgroup. These templates become the default time reporting templates for the members of the taskgroup. You can also assign time reporting templates directly to time reporters using the Create Time Reporter Data page or Maintain Time Reporter Data Page. When time is reported, the system uses the default template (the one assigned to the time reporter's taskgroup) only if you did not assign a time reporting template directly to the time reporter.



You must create time reporting templates before you can create taskgroups.

Assigning Pre-defined Time Reporting Templates

If you're interested in collecting minimal information from time reporters, you can use the two pre-defined templates delivered with PeopleSoft Time and Labor.

- **Punch Template – No Options (PSPCH_NONE).** You may want to assign this template to elapsed time reporters who never need to enter punch time. If the time reporter uses this template, he will be prompted for the date, time, and TRC type only on the Weekly Punch Time Reporting page and the Weekly Elapsed Time Reporting page.
- **Elapsed Template – No Options (PSELP_NONE).** If the time reporter uses this template, he will be prompted for daily units. The time reporting code will default to REG.

Time Rptg Template Page

Usage	Use the Time Rptg Template page to specify time-related fields that are to be displayed on the punch or elapsed time entry pages.
Object Name	TL_RPTD_TMPLT1
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Time Reporting Template
Prerequisites	None.
Access Requirements	Enter the time reporting template ID. You can enter up to ten alphanumeric characters.

Time Reporting Template ID: KUTRTP2

*Description: PTime Rptg Template/Profile *Template Type: Punch Time Reporter

	Required	Optional		Required	Optional
☐ Time Reporting Code	☐	☐	☐ Comp Rate Code	☐	☐
☐ TRC Type	☐	☐	☐ Override Rate	☐	☐
☐ Unit of Measure	☐	☐	☐ Override Reason	☐	☐
☐ Currency Code	☐	☐	☐ Rule Element 1	☐	☐
☐ Time Collection Device ID	☐	☐	☐ Rule Element 2	☐	☐
☐ Day of the Week	☐	☐	☐ Rule Element 3	☐	☐
☐ Time Zone	☐	☐	☐ Rule Element 4	☐	☐
☒ Country	☐	☒	☐ Rule Element 5	☐	☐
☒ State	☐	☒	☒ Task Profile	☐	☒
☒ Locality	☐	☒	☐ Comments	☐	☐
☐ Billable Indicator	☐	☐	☐ Task Template	☐	☐
☐ Badge ID	☐	☐			

Time Rptg Template page (Time Reporting Template page)

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description.**

Time Reporting Template ID

The system displays the time reporting template ID you entered to access the page.

Template Type

Select ***Elapsed Time Reporter***, or ***Punch Time Reporter*** to indicate the type of time reporter the template applies to. ***Elapsed Time Reporter*** causes the system to display the weekly grid on the time entry page. ***Punch Time Reporter*** causes the system to display a weekly grid with all punches for the day.

Selecting the Time Reporting Elements

Select each type of data you want time reporters who use this template to report. For each element you choose, select either ***Required*** or ***Optional*** in the field to the right. The elements available to you depend on whether the template applies to elapsed time reporters or punch time reporters.

Time Reporting Code

This check box is only available when you select ***Elapsed Time Reporter*** in the **Template Type** field. When selected, this check box has a default value of ***Required***. Select this option if you want your time reporters to enter a time reporting code (TRC) for the reported time on the Weekly Elapsed Time Entry page.

TRC Type

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of ***Optional***. Select this option if you want the system to display TRC type (hours, units, or amount) when the time reporter enters a TRC on the Weekly Elapsed Time Reporting page.

TRC Type is dependent on the Time Reporting Code field. If you select TRC Type without selecting Time Reporting Code, the system will automatically select Time Reporting Code.

Unit of Measure

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of ***Optional***. Select this option if you want the system to display the unit of measure for the time reporting code on the Weekly Elapsed Time Entry page when the TRC type is units.

Currency Code

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of ***Required***. Select this option if you want your time reporters to report a currency type code for the reported time.

Time Collection Device ID

This check box is available for both the Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. Select this check box if you are interfacing with a third party time collection device. The system will display the ID of the time collection device to which the time was reported.

Day of Week

This check box is only available when you select a Punch Time Reporter template type. When selected, this check box has a default value of **Optional**. Select this option if you want the system to display the day of the week when the user enters a date on the Punch Time Entry page.

The day of the week is automatically displayed on the Elapsed Time Entry page above the date.

Time Zone

This check box is only available when you select a Punch Time Report template type. When selected, this check box has a default value of **Optional**. Select this option if you want your time reporters to report a time zone for the reported time on the Weekly Punch Time Reporting page.

Country

This check box is available for both Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. Select this option if you want your time reporters to report a country for reported time on the Weekly Elapsed or Punch time entry pages.

State

This check box is available for both Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. Select this option if you want your time reporters to report a state for the reported time on the Weekly Punch Time Reporting or the Weekly Elapsed Time Reporting page. Time reporters will then be able to enter a state other than the default associated with the time reporter's tax location code. (Tax location codes are assigned to time reporters on the Job Data pages in PeopleSoft Human Resources Management.)

The state must be set up for the time reporter in the Maintain Tax Data pages.

Locality

This check box is available for both Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. This option is similar to the state option. Select this option to enable your time reporters to enter a locality for themselves. The locality should be reported with the associated state. The state and locality combination must be defined for the time reporter in the Maintain Tax Data pages.

Billable Indicator

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of **Required**. Select this option if you want your time reporters to report a billable indicator on the Weekly Elapsed Time Reporting page.

If PeopleSoft Projects is integrated with PeopleSoft Time and Labor, the reported value will be passed to Projects.

For more information about PeopleSoft Projects, see PeopleSoft 8 Time and Labor, “Integrating with PeopleSoft Financials”.

Badge ID

This check box is available for both the Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. Select this option if you want the time entry page to display the badge ID the time reporter used when entering time.

Comp Rate Code
(compensation rate code)

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of **Required**. Select the **Comp Rate Code** check box if you want your time reporters to be able to enter a compensation rate on the Weekly Elapsed Time Entry page.

Override Rate

This check box is only available when you select an Elapsed Time Reporter template type. When selected, this check box has a default value of **Required**. Select the **Override Rate** check box if you want your time reporters to be able to enter an override rate on the Weekly Elapsed Time Reporting Entry page. The override rate will be passed to the payroll system for use in pay calculations. Otherwise, the override rate will default to the rate on the time reporting code (TRC) or to the hourly rate on the employee's job record.

Override Reason

This check box is available for both Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Required**. Select this option if you want your time reporters to be able to enter an override reason code on the Weekly Elapsed Time Reporting page or Weekly Punch Time Reporting page.

You defined override reason codes in the Override Reason Code page in PeopleSoft Time and Labor.

Rule Element 1-5

These check boxes are available for both elapsed and punch time reporters. When selected, these check boxes have a default value of **Required**. Select these check boxes if you want to allow your time reporters to override any of the rule elements assigned to them on the Create Time Reporter Data or Maintain Time Reporter Data pages.

You define rule elements on the Rule Element pages.

Task Profile

This check box is only available if the **Task Template** check box is cleared. When selected, **Task Profile** defaults to **Required** and causes a Task Profile drop-down list to appear on the weekly or punch time reporting page.

The task profiles that appear in the drop-down list are determined by the time reporter's taskgroup. If a taskgroup has been assigned to the time reporter directly through the Create Time Reporter Data or Maintain Time Reporter Data page, only those task profiles associated with the assigned taskgroup appear.

Task profiles specify the values of the task elements the system should associate with the reported time. They eliminate the need for the time reporter to enter values for the individual task elements.

For more information about task profiles, see PeopleSoft 8 Time and Labor, "Defining Task Reporting Requirements"

Comments

This check box is available for both the Elapsed Time Reporter and Punch Time Reporter template types. When selected, this check box has a default value of **Optional**. Select this option if you want the person who enters time on the Weekly Elapsed Time Reporting or Weekly Punch Time Reporting page to enter a comment of up to 254 alphanumeric characters for each time entry.

Task Template

This check box is only available if the **Task Profile** check box is cleared. When selected, **Task Template** defaults to **Required**.

Select this check box if you want the weekly elapsed time and weekly punch time reporting pages to include a field for each of the task elements you selected when creating the task template that's assigned to the time reporter's taskgroup.

For more information about task templates, see PeopleSoft 8 Time and Labor, "Defining Task Reporting Requirements"

Creating Templates for Rapid Time Reporting

The rapid time reporting feature of PeopleSoft Time and Labor is especially useful when employees report their time using timecards and data entry personnel enter the time into the system. Data entry is fast because users can enter time for multiple employees and multiple days on the same page. Only a few edits are in place to validate data as it is entered. Complete validation occurs when the user submits the reported time entries. Any exceptions then become visible to managers on the Manage Exceptions page.

You control which fields appear on the Rapid Time Reporting page—the page used to report time. For example, you can design the page based on the format of your time cards. You use the Rapid Time Template page, described in this section, to select the fields you want to include on the Rapid Time Reporting page.

You can create as few or as many rapid time reporting templates as you need. Elapsed and punch time reporters require separate templates.

Where to Find Valid Field Values

You may want to supply data entry clerks with a list of the values that are valid for the data entry fields you choose to include on the Rapid Time Reporting page. The tables where the valid field values are stored are listed below.

Field Name	Table
Task Detail fields	Various. See Where Prompt Tables are Defined in Defining Task Reporting Requirements.
TRC (time reporting code)	TRC
Time Zones	TIMEZONE
Quantity	TL_QUANTITY
Task Profile ID	TASK_PROFILE_ID

Field Name	Table
Currency Codes	CURRENCY_CD
Taskgroup	TASKGROUP
Rule Elements	RULE_ELEMENT_1 (2, 3, 4, or 5)
Comp Rate Code	COMP_RATECD
State	STATE
Locality	LOCALITY
Override Reason	OVERRIDE_RSN_CD

Rapid Time Template Page

Usage	Use the Rapid Time Template page to select the fields that will appear on the Rapid Time Reporting page.
Object Name	TL_RAPID_TMPLT1
Navigation	Define Business Rules, Define Time and Labor, Setup 1, Rapid Time Template
Prerequisites	None.
Access Requirements	Enter a unique name for the template. You can enter up to ten alphanumeric characters.

Rapid Time Template

Rapid Time Template: KURTTE1

*Description: Sample Elapsed Rapid Template

*Template Type: Elapsed Time Reporter

☒ Employee ID
☒ Employee Rcd#
☒ Date Under Report
☒ Employee Name

☒ TRC
☒ Quantity
☐ Currency Code
☐ Task Profile ID

☐ Punch Type
☐ Punch Time
☐ Time Zone
☐ Comments

Task Detail

☐ Company
☐ Business Unit
☒ Location
☐ Department ID
☐ Jobcode

☐ Position Number
☒ Customer
☒ Product
☒ Task

☐ Account Code
☐ PC Business Unit
☒ Project Id
☒ Activity

☐ Resource Type
☐ Resource Category
☐ Rsrc Sub-Category
☐ Business Unit PF

☐ User Field1
☐ User Field2
☐ User Field3
☐ User Field4
☐ User Field5

Overrides

☒ Taskgroup
☐ Country
☒ State
☒ Locality

☐ Comp Rate Code
☐ Override Rate
☐ Override Reason
☐ Billable Indicator

☒ Rule Element 1
☐ Rule Element 2
☐ Rule Element 3
☐ Rule Element 4
☐ Rule Element 5

Rapid Time Template page

Description

Enter a description of up to 30 alphanumeric characters for the template. **Description** is a required field.

Template Type	Select <i>Punch Time Reporter</i> or <i>Elapsed Time Reporter</i> to indicate the type of time reporter the template applies to.
Employee ID	The Employee ID check box is selected automatically to indicate that users must supply the time reporter's employee ID when entering time through the Rapid Time Reporting page.
Empl Rcd# (employee record number)	The Empl Rcd# check box is selected automatically to indicate that a field for employee record number will appear on the Rapid Time Reporting page if you've enabled the Multiple Jobs Allowed option on the Installation table in PeopleSoft Human Resources Management.
Date Under Report	PeopleSoft uses this term to refer to the date for which time is being reported. The Date Under Report check box is selected automatically to indicate that users must complete the Date field when entering time on the Rapid Time Reporting page.
Employee Name	If you want the time reporter's name to display automatically when a user completes the EmplID (employee ID) field on the Rapid Time Reporting page, select the Employee Name check box.
TRC (time reporting code)	The TRC check box is only available when you select <i>Elapsed Time Reporter</i> in the Template Type field. If you select this check box, a TRC field will appear on the Rapid Time Reporting page.
Quantity	The Quantity check box is only available when you select <i>Elapsed Time Reporter</i> in the Template Type field. It is automatically selected and indicates that a Quantity field will be included on the Rapid Time Reporting page. The user can supply hours, units, or an amount when reporting time.
Currency Code	The Currency Code check box is only available when you select <i>Elapsed Time Reporter</i> in the Template Type field. Select this option if you want a Currency Code field to appear on the Rapid Time Reporting page. If a user enters an amount or rate when reporting time on the Rapid Time Reporting page, the system can pass this data to your payroll system during processing.

Task Profile ID

Select the **Task Profile ID** check box if you want the Rapid Time Reporting page to include a Task Profile ID field. The system will refer to the time reporter's task profile to determine how to allocate the reported time across tasks.

If you choose the **Task Profile ID** check box, you will not be able to select individual tasks from the Task Detail group box on this page.

For more information about task profiles, see PeopleSoft 8 Time and Labor, "Defining Task Reporting Requirements"

Punch Type

The **Punch Type** check box is only available when you select **Punch Time Reporter** in the **Template Type** field. It is automatically selected and indicates that a Punch Type field will appear on the Rapid Time Reporting page. The user will be able to select *Break*, *In*, *Meal*, *Out*, or *Transfer* from a drop-down list.

Punch Time

The **Punch Time** check box is only available when you select **Punch Time Reporter** in the **Template Type** field. It is automatically selected and indicates that a Punch Time field will be included on the Rapid Time Reporting page.

Time Zone

The **Time Zone** check box is only available when you select **Punch Time Reporter** in the **Template Type** field. Select this check box if you want the Rapid Time Reporting page to include a Time Zone field.

Country

Select the **Country** check box if you want the Rapid Time Reporting page to include a field for a country code. Users will then be able to select a country when reporting time. The **Country** check box is required when you select the **State** and **Locality** check boxes in the **Overrides** group box.

Comments

The **Comments** check box is available for both Elapsed Time Reporter and Punch Time Reporter template types. Select this check box if you want users to be able to enter a comment for each time entry.

Task Detail

If you did not choose the **Task Profile ID** option box, you can select the task-related data entry fields that you want to appear on the Rapid Time Reporting page.



Select only those task elements that are included in the default task templates assigned to the time reporters. When a data entry clerk reports tasks that are not associated with the task template, the validation process triggers exceptions.



For more information about task fields, see [Creating and Viewing Task Values](#).

Overrides

In the **Overrides** group box you can select additional fields you want to appear on the Rapid Time Reporting page. If a user completes any of these fields when reporting time, the entered values will override default values defined elsewhere in PeopleSoft Time and Labor or Human Resources Management.



For more information about default values, see [Understanding Default Processing](#).

Taskgroup

Select the **Taskgroup** check box if you want a Taskgroup field to appear on the Rapid Time Reporting page. Users will then be able to override the time reporter's default taskgroup when entering time. The system will use the task profile ID associated with the chosen taskgroup to determine how reported time should be allocated across tasks.

Note. If you select any of the **Task Detail** check boxes and also select **Taskgroup**, it will be possible for a user to enter task data on the Rapid Time Reporting page that does not match the default task profile ID for the time reporter's taskgroup.

State

Select the **State** check box if you want a State field to appear on the Rapid Time Reporting page. Users will then be able to enter a state other than the default state associated with the time reporter. The value in the State field identifies the state and local tax jurisdictions in which the time reporter works.

If you select the **State** check box, you must also select the **Country** check box.

Locality

The **Locality** check box is similar to the **State** check box. Select the **Locality** check box if you want to give users the ability to override a time reporter's default locality. The locality must be reported with the associated state and country. If PeopleSoft Time and Labor is integrated with North American Payroll, the state and locality combination must be defined for the time reporter on the Maintain Tax Data page.

If you select the **Locality** check box, you must also select the **Country** and **State** check boxes.

Comp Rate Code
(compensation rate code)

The **Comp Rate Code** check box is only available when you select **Elapsed Time Reporter** in the **Template Type** field. If you select this check box, the time-entry clerk will be able to enter a compensation rate code that overrides the code assigned to the time reporter on the job record.

You define compensation rate codes and assign them to employees in PeopleSoft Human Resources Management.

Override Rate

The **Override Rate** check box is only available when you select **Elapsed Time Reporter** in the **Template Type** field. Select this check box to enable users to override the time reporter's default rate when reporting time on the Rapid Time Reporting page. The rate will be passed to the payroll system for use in pay calculations.

Override Reason

Select this check box if you want data entry clerks to be able to enter an override reason code on the Rapid Time Reporting page. The code identifies why any override was entered.

Override reason codes are defined in the Override Reason Code page in PeopleSoft Time and Labor.

Billable Indicator

The **Billable Indicator** check box is only available when you select **Elapsed Time Reporter** in the **Template Type** field. Select this check box if you want a Billable Indicator field to appear on the Rapid Time Reporting page. If PeopleSoft Projects is integrated with PeopleSoft Time and Labor, the value entered in this field will be passed to Projects.

For more information about PeopleSoft Projects, see PeopleSoft 8 Time and Labor, "Integrating with PeopleSoft Financials"

Rule Element 1 to 5

If you want to give users the ability to override specific rule elements assigned to time reporters, select the appropriate rule element check boxes. When reporting time on the Rapid Time Reporting page, users can then enter values for the rule elements that pertain to the reported time.

You define rule elements on the Rule Element page and assign them to time reporters on the Create Time Reporter Data or Maintain Time Reporter Data page.

Rapid Time Reporting

The Rapid Time Reporting page is well suited to time card entry, because it allows you to quickly enter time for multiple time reporters. No online edits or rules are applied during data entry, so you can enter data at top speed.

Because there's no up-front validation, try to enter data as accurately as possible. You may also want to have a list of the field values that are valid for your organization nearby when you to enter time—for example, the list of valid time reporting codes, task entity codes, and rule element values, if applicable.



For more information about valid field values, see [Where to Find Valid Field Values](#).

Submitting Reported Time for Validation

After you enter time on the Rapid Time Reporting page, you click the Submit button to validate your entries. During validation, the system checks all the time reporting code and task data you've entered for the session. It also verifies that the status of each time reporter is *Active* and checks for compensation and leave data. Invalid transactions appear on the Manage Exceptions pages for the manager's review. Transactions that pass the validation process are converted to reported time.

If you selected the Automatic Rules Run option on the TL Installation page, the Submit Time process also launches the Time Administration process, which converts the reported time to payable time.



If the rapid entry data includes task details that do not match the employee's task profile, the task details you entered will be moved to the Reported Time table as long as they pass the validation process.

Rapid Time Reporting Page

Usage	Use the Rapid Time Reporting page to enter daily time quickly for time reporters and submit time for validation.
Object Name	TL_RAPID_SESSION
Navigation	Administer Workforce, Capture Time and Labor, Use, Rapid Entry
Prerequisites	You must create a rapid time template before you can use the Rapid Time Reporting page.
Access Requirements	If accessing the page in Update/Display mode, you must select the session number.

Rapid Time Reporting

Rapid Session Information

Session Number:625

Rapid Time Template:KURTP2

Description:KU0020 1-6

Add/Replace:Replace

Rapid Detail Information

Delete	*EmpID	Empl Rcd#	Name	*Date	Punch Time	Punch Type	Task Profile ID	Taskgroup	State	Locality
☐	KU0020	0	Stevenson,Christelle	06/01/2000	08:00	In	KUTSKPRF2#			
☐	KU0020	0	Stevenson,Christelle	06/01/2000	12:00	Meal	KUTSKPRF2#			
☐	KU0020	0	Stevenson,Christelle	06/01/2000	13:00	In	KUTSKPRF2#			
☐	KU0020	0	Stevenson,Christelle	06/01/2000	15:00	Break	KUTSKPRF2#			
☐	KU0020	0	Stevenson,Christelle	06/01/2000	15:15	In	KUTSKPRF2#			
☐	KU0020	0	Stevenson,Christelle	06/01/2000	17:00	Out	KUTSKPRF2#			

Add Row(s)

Delete Selected Row(s)

Rows to Add:1

☒ Copy Down Values from Last Row

Save

Submit

User ID:PS

Last Updated:08/06/00 11:30:57

Rapid Time Reporting page



Column order for grids may vary by implementation. All columns may not be visible. Use the page’s horizontal scroll bar as necessary to view all the available columns.

Session Number The system displays the session number as 9999999999 until you save the page, at which time it automatically assigns the session number.

Description Enter a description of up to 30 alphanumeric characters for this session.

Rapid Time Template

Select the rapid time template you wish to use. The template determines which data entry fields appear in the Rapid Detail Information section below.

Note. If you select a different Rapid Time Template after you enter time, the system will delete any unsaved entries.

Add/Replace

Replace is the default value. It tells the system to replace any time that was entered for the same dates through either the Rapid Entry page or the Mass Time Reporting page with the time you are entering now. Only time originating from those two sources will be replaced by the new instance of time. Time that originated from any other source, such as the Weekly Elapsed Time page, will not be replaced.

Select **Add** if you want the system to add a new instance of time for the day without replacing any time that was previously reported for the same day. The system adds the time generated by the Rapid Entry page to the Reported Elapsed table (PS_TL_RPTD_ELPTIME) or Punch Time table (PS_TL_RPTD_PCHTIME).

Rapid Detail Information

The fields that appear in the **Rapid Detail Information** section will vary depending on the rapid time template you selected. The **Delete** check box enables you to delete an entry and is explained later in this section. **EmplID** (employee ID) and **Date** are always required fields.

Few prompt tables are provided for fields within the grid, so you will need access to the various codes you'll type in, including the time reporting codes, task, and override values.



For more information about the fields that can appear on this page, see the Rapid Time Template Page.



If you report task elements that are not part of the time reporter's default task template, and do not report a different taskgroup, the validation process that occurs when you run Time Administration task data validation will trigger exceptions.

Save

Click the Save button when you are ready to save the session. The system assigns a session number that replaces 9999999999.

Once you save a session you can exit the page, return later, and enter additional rows of data for the session.

Submit

Click the Submit button when you are ready to validate the data you've entered. When you click the Submit button, the system saves and submits the data. You cannot make any changes to the session until the Submit process is complete.

User ID

If this is a new session, your user ID appears here. If you are updating a session, the user ID of the last person who entered data for the session is displayed in this field.

Last Updated

If this is a new session, the time you accessed the page is displayed here. If you are updating a session, the date and time that data was last saved for the session is displayed in this field.

Note. You can see who entered time for an employee on a particular date on the Elapsed Time Audit Page or Punch Time Audit Page once the time data has gone through the Submit Time process.

Adding Rows of Data During Rapid Time Reporting

You can add as many rows of data as you need to a session.

To add rows to a session:

1. In the **Rows to Add** field, enter the number of rows you want to add.
2. If you want the values entered in the previous row to be copied into the new rows, select the **Copy Down Values from Last Row** check box. Clear this check box if you want the system to add blank rows.
3. If you're using an elapsed time template and want each new row to display the next date, select the **Increment Date** check box.
4. Click the **Add Row(s)** button.

Deleting Rows of Data During Rapid Time Reporting

To delete rows from a session:

1. Select the **Delete** check box for each row of data you want to delete.
2. Click the Delete Selected Row(s) button.

Viewing Time Entered on the Rapid Time Reporting page

To view a session entered on the Rapid Time Reporting page, access the page in Update/Display mode.

Once time has been submitted, you can also view time by employee ID and date using either the Weekly Elapsed Time Page page or the Weekly Punch Time Page.

CHAPTER 14

Using Time Collection Devices

With our robust Time Collection process you have control over how you want the system to collect and send time-related information to and from your time collection device (TCD).

PeopleSoft Time and Labor enables you to report start and stop times. We're partnering with leading electronic time clock suppliers, and utilizing PeopleSoft Application Messaging technology to service those customers who need to support other types of time capture devices. With our TCD interface, our packaged integration points provide the ability to collect clock (punched) and elapsed time from any time collection device for processing through Time and Labor. And, we can send necessary setup data to these devices for improved capability and flexibility at the point of reporting time. Setup data, such as time reporter, supervisor information, task detail, and restriction rules, is synchronized with the clock system. In addition, Time and Labor also supports scheduling, reporting, managing, and applying rules for this method of time reporting.

We know that many TCD time reporters perform the same tasks and that their cost allocation data remains static. Using our system, time reporters can swipe their badges when they start and stop working without setting up task data. The time reporter's default task profiles that are defined in PeopleSoft Time and Labor can then be used to allocate these costs.

Elapsed-time reporters who use PeopleSoft Mobile Time and Expense technology will download their time to a server; then that time gets routed to PeopleSoft Time and Labor.

PeopleSoft Time and Labor uses schedules and restriction profiles to determine when the time reporter is scheduled to punch in/out for work, meals, and breaks, and to determine when to allow or disallow punches to occur.

We also provide a page so you can group your TCD information to use when enrolling your time reporters into PeopleSoft Time and Labor. Use this page to group your TCDs so that a time reporter can punch to all the clocks required for the job. For example, a time reporter may need to have the capability to punch to clock A when performing shipping tasks, and then may need to punch to clock B when performing warehouse tasks. You group these two clocks on the TCD Group page and assign the TCD group to the time reporter on the Create or Maintain Time Reporter Data page. Grouping the TCDs enables the time reporter access to both clocks.

PeopleSoft Time and Labor uses the information you define using the TCD pages to control the data going to the TCDs. It does not send data the TCD cannot handle. This reduces traffic on the network and reduces the amount of data your TCD ignores.

The TCD Interface and Referential Integrity

When you make a change to one area of the application, Referential Integrity makes sure the changes do not adversely affect another area of the application. It checks for retroactive changes to effective dated setup data or time reporter related data that could invalidate related objects or values in the system.

The following tables describe Referential Integrity actions when certain changes, inactivations, or deletions are made during TCD processing.



For more information about the Referential Integrity feature within PeopleSoft Time and Labor see Understanding Referential Integrity in this PeopleBook.

Prevention of Inactivation or Deletion of Effective-Dated Rows

The following table lists the pages and conditions when the system will not allow the inactivation or deletion of effective-dated rows.

Page	Condition
TCD group	You cannot inactivate a TCD group that is associated to a time reporter.
	You cannot delete an effective-dated row if the deletion invalidates the association to a time reporter.
TCD Setup	You cannot inactivate a TCD if the TCD is attached to a TCD group.
	You cannot delete an effective-dated row if it invalidates the association to a TCD group.

Execute Edit Error Checking

You cannot change the minimum effective date on a page to be less than the minimum effective date of a field that acts as a prompt on this page.

Page	Prompts on Page
TCD Setup	TCD Type
	TRC Program
	Taskgroup

Nested Effective Dates

You cannot change the effective date of the prompt table to be greater than the effective date of the target table.

Prompt Table	Target Table
TCD Type	TCD Setup
TCD Setup	TCD Group
TCD Restriction Profile	TCD Group
TCD Group	Maintain TR Data



For more information about how the system reacts on nested effective-dated tables, see Understanding Nested Effective-Dated Tables in this PeopleBook.

Setting Up Your Time Collection Device Information

When setting up your TCD, you identify a generic set of input data that is sent to your various TCD systems. You choose which data elements you need based on your business requirements and the capabilities of the TCD you are using. You also determine a generic set of output data that will be produced by your various TCD systems. Your TCD vendor will need to populate all required fields, along with optional fields when applicable.

There are five pages you use to set up your time collection device information:

- TCD Type Definition page.

Use this page to establish the data elements to send to your TCD. If you add or update a field on this table, you will need to re-download the data to your TCD. For example, you could change the number of schedule days you want to send schedules for, and, from then on, the system will incorporate the change in days whenever our messages are published.

- TCD Setup page.

Use this page to establish information about your TCD. This page will mirror the configuration you have established at your TCD. You should know if your TCD is configured to accept information you select to send. If your TCD is not set up to handle the selected data, the information will not be processed. You also use this page to set up your configurations and locations.

- TCD Supervisor page.

Use this page to establish the supervisors who can perform TCD supervisor functions at your TCD, such as overriding a punch or managing TCD access. If you add or change a supervisor's information, then you need to re-download data to your TCD. For example, if

you remove a TCD supervisor, or change a supervisor's PIN number, you will need to re-download the supervisors to the affected TCDs.

- TCD Restriction Profile page.

Use this page to establish restriction profile data for your TCD. You use this profile to determine when to allow or disallow punches to occur in conjunction with the time reporter's schedule. If you add or update a record, you will need to re-download the data to your TCD. For example, if you change a late punch margin, then you need to re-download the data to inform the TCD of the change.

- TCD Group page.

Use this page to establish your TCD group. TCDs are grouped together so that time reporters can access more than one TCD for time reporting purposes.

You determine the frequency in which you pass data between the TCD and PeopleSoft Time and Labor. It is recommended that you schedule the process to run on a regular basis.



You do not need to use the TCD Setup page if you are using PeopleSoft Mobile Time and Expense. Mobile Time and Expense sends messages to PeopleSoft Time and Labor by time reporter ID containing elapsed time that Time and Labor sends to a pay system and to Peoplesoft Projects; Mobile Time and Expense does not accept any setup data from Time and Labor.



For more information about the PeopleSoft Mobile Time and Expense integration with Time and Labor, see Integrating with PeopleSoft Financials PeopleSoft Expenses with Mobile Time and Expense, in this PeopleBook.

Following is the information that you need to verify or set up before you can interface to your TCD.

- Setup your TCD Information using the appropriate PeopleSoft Time and Labor pages. If you are using our Mobile Time and Expense application, you do not have to set up a TCD configuration using the TCD Setup page.
- Make sure your messages are **Active**.
- Set up your vendor interface for your organization. Determine communication setup links between your TCDs and PeopleSoft Time and Labor.
- Make sure all values are mapped and configured correctly. If your TCD accepts schedule, TRC, or task information, your interface will need to map to our codes that will actually be displayed on your TCD.
- Establish flat file or eXtensible Markup Language (XML) integration information.

If you use XML, time sent from the TCD is transferred through an active message that is automatically sent to the reported time tables. For setup data being sent to the TCD, messages are transferred as often as you determine them to be published, sending data to the TCD. If you are using a flat file integration, the flat file of reported time that the TCD writes to a common directory will be picked up and converted to a message into PeopleSoft Time and Labor. These system messages are a part of the enterprise integration points that the system uses to send time data back and forth from PeopleSoft Time and Labor to your TCD and back again.



For more information about the enterprise integration points the TCD Interface uses, see Understanding Enterprise Integration Points in this chapter.

To set up for XML integration:

1. Ensure that the messages are active. This is found in the message properties, under Application Designer.
2. Make sure message nodes have been created in Application Designer.

Each comm server is associated with a message node.

3. Once you have created the message nodes, put them on the PUNCH_TIME and ELAPSED_TIME message channels with the appropriate routing direction.

Since this is incoming time, the correct routing direction is most likely “Subscribe From.”

To set up for flat file Integration:

1. Ensure that the messages are active. This is found in the message properties, under Application Designer.
2. Verify that one of the nodes on the PUNCHED_TIME and ELAPSED_TIME message channels are the local node.

You can find this out by checking the Message Node Properties. Ensure that the routing direction for the local node is “Both Publish and Subscribe.”

3. Setup the inbound file rule under Manage Integration Rules, Inbound File Rule.
4. Make sure that the directory is the one that will contain the elapsed or punch time files.

Your publish rules should look similar to: Inbound File:

c:\temp\PUNCHED_TIME_ADD*.csv. File Layout ID: Blank, LUW Size: Blank,
Application: TL_TCD_FILE, Section: Archive, File Layout Name: 1
PUNCHED_TIME_ADD, Message Name: PUNCHED_TIME_ADD.

Example

The following page shows an example of this setup. This page is found under Define Business Rules, Manage Integration Rules, and Inbound File Rule.

File Inbound

File Identifier: PUNCHED_TIME

Inbound File: c:\temp\PUNCHED_TIME.csv ☐ Index Flag

*Status: Active

File Layout ID:

LUW Size:

Program Name: TL_TCD_FILE Section: ARCHIVE

☐ Create Message Header

☐ Create Message Trailer

File Layout View All First 1 of 1 Last

	*Definition Name	*Message Name
1	PUNCHED_TIME_ADD	PUNCHED_TIME_ADD

Using File Inbound page to setup

The comm server attached to your TCD creates and continually appends onto a file of the form [message name]-[comm server]. csv. For example, comm server cs1 would create and append onto a file named PUNCHED_TIME_ADD-cs1.csv for its punch time message. The directory containing the comm-server-generated files should correspond to the directory in the Inbound File Rule.

To initiate the inbound file publish, select Define Business Rules, Manage Integration Rules, Process, Inbound File Publish and create a run control.

After the punched time has been received by PeopleSoft Time and Labor, the time is evaluated to determine if it is good enough to go into Reported Time. If the time is error free, the rows are now located in Reported Time. If the time is invalid, the message will be displayed on the TCD Error Queue.



If the data from your TCD is in Flat File format and the value is in character format for a numeric field, we will default the character to zero (0). If a value is sent in a numeric format for a character field, the system will add that value into the field. If the data from your TCD is in XML format, the message including invalid formats for the fields will be stopped in the Application Message Monitor.



You will need to make sure the information you send is in the correct formats for proper processing. This is especially important if you are using Multiple Jobs and reporting by multiple time reporter record numbers. If you fill in the Time reporter ID but not the Time reporter Record Number, the system will default the Time reporter Record Number to zero. This is a valid value, so you will need to be sure the Time reporter Record Number is entered before sending the information to PeopleSoft Time and Labor.

TCD Type Definition Page

Usage	Use the TCD Type Definition page to select the data elements required to pass back and forth from PeopleSoft Time and Labor to your time collection device.
Object Name	TL_TCDDEF_PNL
Navigation	Define Business Rules, Define Time and Labor, TCD, TCD Type Definition.
Prerequisites	None.
Access Requirements	TCD Type.

TCD Type Definition

TCD Type: KUFLAT1

Time Collection Device Type Definition View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Flt, Prfls, TRCs, Sched 7, RE1 Short Description: Flat1

TCD Function Integration

Task Elements	Rule Elements	Reporting Elements	Integration Type
☒ Send Task Profiles	☒ Send Rule Element 1	☐ Send Country	☐ XML Integration
☐ Send Task Template	☐ Send Rule Element 2	☐ Send State	☒ Flat File Integration
☐ Send Task Values	☐ Send Rule Element 3	☐ Send Locality	
☐ Send Hours	☐ Send Rule Element 4	☐ Send Rate Code	
☒ Send TRCs	☐ Send Rule Element 5	☐ Send Currency Code	
☒ Send Schedules	Schedule Days: 7	☐ Send Override Reason Code	

TCD Type Definition page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date**, **Status**, **Description**, **Short Description**.

TCD Type

This field reflects the value you entered to access the page.

TCD Function Integration

Task Elements

Send Task Profiles

Select this check box if you want PeopleSoft Time and Labor to send task profiles to your TCD. The system sends task profiles that are valid for your TCD. The system only extracts and sends task profile records that are defined as **Send to TCD**. The valid task profiles are derived from the taskgroups associated to your TCD.

Send Task Template

Select this check box if you want Time and Labor to send Task Templates to your TCD. The system sends Task Templates that are valid for your TCD. The valid templates are derived from the taskgroups associated to your TCD. Task templates contain the task elements that can be entered at your TCD, such as a value for Department and Account Code.

Note. The system will send a default task template for each Time Reporter message, if you choose to use Task Template reporting but do not want to present a list of templates for your Time Reporter's to select from. This default provides the ability to automatically prompt for task elements based on the Time Reporter at your TCD.

Send Task Values

Select this check box if you want PeopleSoft Time and Labor to send task values to your TCD. This option is only available if you select **Send Task Templates**. These task values correspond to the valid task elements associated to the task template. For example, valid values for task elements **Department** and **Account Code** may be **Shipping and Receiving**, and **1001** and **1002** respectively.

Send Hours

Select this check box if you want PeopleSoft Time and Labor to send hours to your TCD, which represent the total hours that will be compensated. These hours have been run through the Time Administration process and are considered payable time. The payable time hours with TRCs that will be sent are for the beginning of the current period for the time reporter up to the current date.

Send TRCs

Select this check box if you want PeopleSoft Time and Labor to send time reporting codes (TRCs) to your TCD. The system only extracts and then sends TRCs that have been established as **Send to TCD** on the TRC definition, and are a part of the TRC program ID you select on the TCD Setup page.

For more information about time reporting codes, see PeopleSoft 8 Time and Labor, "Establishing Time Reporting Codes" in this PeopleBook.

Note. You may need to convert character codes to numeric codes before you can use them, depending on your TCD requirements for the elements you are sending to your TCD.

Send Schedules

Select this check box if you want PeopleSoft Time and Labor to send schedules to your TCD. The schedule information comes from the Schedule table. The system sends your time reporter's daily punch schedules to your TCD. Your TCD uses this information to determine when your time reporter is scheduled to punch in and out for work, meals, and breaks. Your scheduling setup, assignment, and calendar build process must be executed before PeopleSoft Time and Labor can send the appropriate information to your TCD.

The system does not send holiday schedules to your TCD. It will be up to you to determine how to assign schedules in coordination with the holiday schedule.

You must select this check box if you intend to use restriction profiles with your TCD.

Note. This data structure will contain multiple instances of schedules per day. If your TCD requires only one schedule record per day, you will need to reformat the input data before sending schedules to your TCD.

Schedules Days

Enter the number of days of the schedule to send to your Time Collection Device. The system will send today's punch schedule detail in addition to the number of days you define in this field for each time reporter. The limit is 99. If **Send Schedules** is clear, this field is unavailable for entry.



For more information about taskgroups and task data, see Defining Task Reporting Requirements in this PeopleBook.

Rule Elements

Send Rule Element 1

Select this check box if you want PeopleSoft Time and Labor to send a listing of values from the Rule Element 1 table to your TCD.

Rule elements contain a listing of values that you define on the Rule Element 1 table. These rule elements can be positively reported. They are special compensation elements that rules can be built upon and used by Time Administration. An example of this is, if a value for a rule element on the Rule Element table is labeled Close Store, and a time reporter reported this code, the time reporter could receive special compensation based on the rules for closing the store for the day.

Send Rule Element 2

Select this check box if you want PeopleSoft Time and Labor to send a listing of values from the Rule Element 2 table to your TCD.

Send Rule Element 3

Select this check box if you want PeopleSoft Time and Labor to send a listing of values from the Rule Element 3 table to your TCD.

Send Rule Element 4

Select this check box if you want PeopleSoft Time and Labor to send a listing of values from the Rule Element 4 table to your TCD.

Send Rule Element 5

Select this check box if you want PeopleSoft Time and Labor to send a listing of values from the Rule Element 5 table to your TCD.



For more information about creating rule elements see *Creating Rules, Defining and Using Rule Elements within Rules*.

Reporting Elements

Send Country

Select this check box if you want PeopleSoft Time and Labor to send a list of country names to be positively reported with time. The system uses the default country defined on the TCD, if one is not positively reported.

Send State

Select this check box if you want PeopleSoft Time and Labor to send a list of states to be positively reported with time. The system uses the default state defined on the TCD if one is not positively reported.

Send Locality

Select this check box if you want PeopleSoft Time and Labor to send a list of localities to be positively reported with time. The system uses the default locality defined on the TCD if one is not positively reported.



As time comes in from the inbound interface, if the country, state, or locality, are different from the TCD setup default, then the inbound interface automatically populates those fields on reported time with what is positively reported. It should also be noted that the inbound interface allows for positive reporting on these fields. Therefore, at table change time, there is no way for PeopleSoft Time and Labor to determine if the time was positively reported, or if it was defaulted in from the TCD definition. As a result, the system will not be doing any referential integrity actions on these fields if there are changes.

Send Rate Code

Select this check box if you want PeopleSoft Time and Labor to send a list of valid comp rate codes to be reported at the TCD. This value is only valid in conjunction with a reported TRC at the TCD.

Send Currency Code

Select this check box if you want PeopleSoft Time and Labor to send a list of valid currency codes to be reported at the TCD.

Send Override Reason Code

Select this check box if you want PeopleSoft Time and Labor to send the table of all override reason codes you have entered in the Override Reason Code page.

Integration Type**XML Integration**

Select this option if you are using XML integration.

Flat File Integration

Select this option if you are using flat file integration. If you select this option, you must also establish an outbound and inbound archive file location on the TL Installation page.



For more information about setting up your PeopleSoft Time and Labor Installation Options, see *Setting Up Your Basic Tables: Establishing TL Installation Options* in this PeopleBook. For more information about Integration specifications, see the end of this chapter.

TCD Setup Page

Usage	Use the TCD Setup page to establish basic information required to send information back and forth from PeopleSoft Time and Labor to your TCD.
Object Name	TL_TCD_SETUP_PNL
Navigation	Define Business Rules, Define Time and Labor, TCD, TCD Setup
Prerequisites	TCD Type Definition page, TRC Programs
Access Requirements	TCD ID

The screenshot displays the 'TCD Setup' page with the 'TCD Taskgroup' tab active. The 'TCD ID' is set to 'KUTCD1'. Below this, the 'Time Collection Device Settings' section is visible, containing several fields: 'Effective Date' (01/01/1980), 'Status' (Active), 'Description' (First Floor Time Clock), 'Short Description' (TCD1), 'Installation date' (01/01/1980), 'TCD Type' (KUXML1), and 'TRC Program ID' (KUTP2). The 'TCD Communication Settings' section is also present, with fields for 'Message Node Name' (PSFT_HR), 'Terminal ID', and 'Network ID'.

TCD Setup page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

Time Collection Device Settings

TCD ID

This field reflects the value you entered to access the page.

Installation Date

Select the date your TCD was installed. This field is used for your own information purposes and nowhere else in the system.

TCD Type

Select the TCD type you want to use for this TCD. This is required so the system knows which data elements to send to your TCD. This also reflects if your TCD type is an XML or flat file.

TRC Program ID

Select the TRC Program ID associated with the TRCs you want to send to your TCD. This field is required if you selected to Send TRCs on the TCD Type page.

Note. Only TRCs in the TRC Program that are defined as **Send to TCD** are sent to your TCD.

TCD Communication Settings**Message Node Name**

Enter the Message Node or Comm Serv ID to which you want to send the information. Comm Serv is used for flat file integration. Message Node is used for XML integration and uses PeopleSoft Application Messaging technology. The field changes based on the **TCD Type** you have selected.

Terminal ID

Enter the ID you use for your TCD. Enter a value in this field depending upon your system configuration. This field is required if your TCDs are configured like the picture with the caption: Configuration 2 – Comm Serv/Message Node and Terminal ID are required, following this section.

Network ID

Enter the network ID to which you want PeopleSoft Time and Labor to send data. This field is required if your organization is configured like the picture with the caption: Configuration 3 – All Communication Settings are required, following this section.

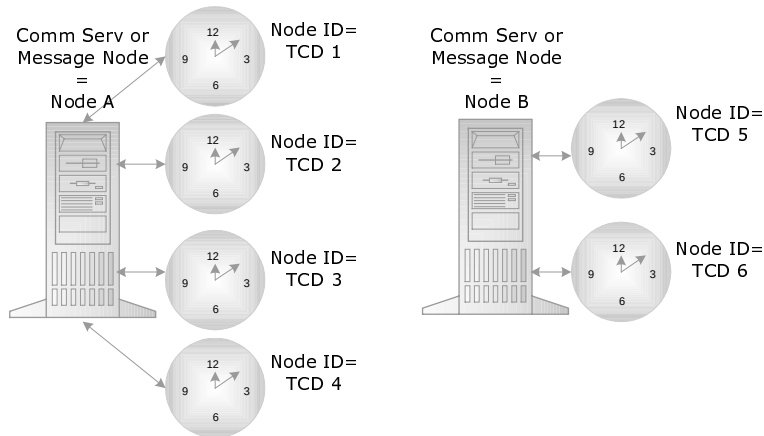


For more information about PeopleSoft Application Messaging, see your PeopleSoft Enterprise Integration PeopleBook.

The following diagrams will help you determine which communication settings are necessary for your organization.

Communication Settings

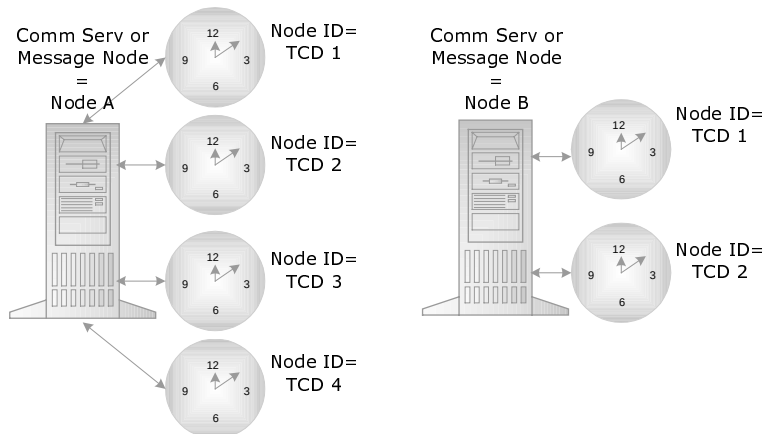
If you uniquely identify your Terminals throughout your entire system, then only Comm Serv/Message Node is required.



Configuration 1 - Comm Serv/Message Node Required

Communication Settings

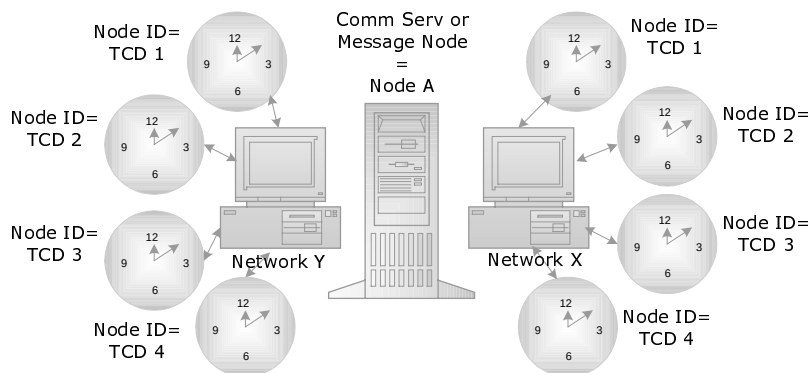
If you do not uniquely identify your Terminals throughout your entire system and the picture below is representative of your configuration, then both Comm Serv/Message Node and Terminal ID are required.



Configuration 2 – Comm Serv/Message Node and Terminal ID are required.

Communication Settings

If you do not uniquely identify your Terminals throughout your entire system and the picture below is representative of your configuration, then all Communication Settings are required.



Configuration 3 – All Communication Settings are required

TCD Taskgroup Page

Usage	Use the TCD Taskgroup page to establish physical settings along with the taskgroup you want to use with this TCD.
Object Name	TL_TCD_TSKGRP_PNL
Navigation	Define Business Rules, Define Time and Labor, TCD, TCD Taskgroup
Prerequisites	Setup Taskgroups.
Access Requirements	Access TCD Setup page.

The screenshot shows the 'TCD Setup' window with the 'TCD Taskgroup' tab selected. The 'TCD ID' is 'KUTCD1'. Below this is the 'TCD Physical Settings' section, which includes fields for 'Effective Date' (01/01/1980), 'Country' (USA), 'State' (CA), 'Locality' (67000), 'Time Zone' (PST), and 'Language Code' (English). Each field has a magnifying glass icon for search. To the right of these fields are the corresponding values: 'United States', 'California', 'SAN FRANCISCO ER TAX', 'Pacific Time, Tijuana', and 'English'. Below the physical settings is the 'Time Collection Device Taskgroups' section, which lists two taskgroups: 'KUTSKGRP1' (Task Grp for Template & Prfl 1) and 'KUTSKGRP2' (Task Grp for Template & Prfl 2). Each taskgroup has a magnifying glass icon and a '+' or '-' button to its right.

TCD Taskgroup page

TCD Physical Settings

Country Select the country where this TCD is located.

State Select the state where this TCD is located.

Locality Select the locality where this TCD is located.



Use **Country**, **State**, and **Locality** for Elapsed and Punch Time reporting. Country, state, and locality can be positively reported using the Punch or Elapsed Time Interface. If they are not positively reported, the system looks for these values on the TCD Setup page. The system then populates the time records with the values from the TCD Setup page. If the values are not established on the TCD Setup page, the system does not pass any values at all to Time Administration. It is up to the receiving payroll system to get the Default State and locality.

TimeZone Select the time zone where this TCD is located. The system uses time zone for punch time reporting. If a time zone is not reported, the system looks for the time zone on your TCD Setup, if it's not on the TCD Setup, then the system looks at the base time zone on the PeopleTools Options page, under Utilities.

If time zone is reported, it is validated in the TCD Interface process, if it does not pass validation, the system looks at the TCD Setup to populate the **TimeZone** field, if none exists, the system uses the base time zone.

Language Code Select the language you want to use for this TCD.

Time Collection Device Taskgroups

Taskgroup

Select the taskgroup(s) you want to send to your TCD. The system will not send taskgroup or task profile information to your TCD if this field is cleared. You can send one or more taskgroups to the TCD. However, the system edits time reporter data to verify if the time reporter is assigned to a taskgroup that is associated to a TCD in the time reporter's TCD group. If a time reporter reports time to a taskgroup (task profiles or task values) that are not related to the taskgroup assigned to the time reporter, the taskgroup will be considered borrowed.

For more information about Taskgroups, see Defining Task Reporting Requirements: PeopleSoft 8 Time and Labor, "Defining Task Reporting Requirements".

TCD Supervisor Page

Usage	Use this page to establish supervisors allowed to perform certain functions at your TCD
Object Name	TL_TCD_SUPERV_PNL
Navigation	Define Business Rules, Define Time and Labor, TCD, TCD Supervisor
Prerequisites	None.
Access Requirements	Time reporter ID

TCD Supervisor

EmplID: KU0010 Name: Santos, Antonio

TCD Supervisor

*TCD Supervisor ID: SUPER1

Supervisor Pin Number: 654321

TCD Supervisor page

EmplID

This field reflects the value you entered to access this page.

Name

This field reflects the name of the EmplID you entered to access this page.

TCD Supervisor ID

Enter a unique supervisor ID. This ID uniquely identifies a TCD supervisor. You will establish all the supervisors who can perform supervisor functions at your TCD when you create your TCD groups.

Supervisor Pin Number

Enter the Personal Identification Number associated with the supervisor ID. This ID could be the security number you use as a password to access the TCD when you need to override a punch or function.

TCD Restriction Profile Page

Usage	Use this page to establish restriction profile data. Your TCD uses this information to determine when to allow or disallow punches.
Object Name	TL_RESPRF_TBL_PNL
Navigation	Go, Define Business Rules, Define Time and Labor, TCD, TCD Restriction Profile
Prerequisites	None.
Access Requirements	Restriction Profile ID

TCD Restriction Profile

Restriction Profile ID: KURSTPRF1

Restriction Profile Attributes View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active + -

*Description: Basic Restriction Profile Short Description: RestPrf1

☐ Restrict Unsched Meal Punch	Early In-Punch Margin (Mins): 15
☒ Restrict Early In Indicator	Late In-Punch Margin (Mins): 10
☒ Restrict Late In Indicator	Early Out-Punch Margin (Mins): 15
☒ Restrict Early Out Indicator	Late Out-Punch Margin (Mins):
☐ Restrict Late Out Indicator	Early Meal Margin (Mins):
☐ Restrict Early Meal Indicator	Late Meal Margin (Mins): 10
☒ Restrict Late Meal Indicator	Early Break Margin (Mins):
☐ Restrict Early Break Indicator	Late Break Margin (Mins): 5
☒ Restrict Late Break Indicator	

TCD Restriction Profile page

Restriction Profile ID

This field reflects the value you entered to access this page.

Restrict Unsched Meal Punch

Select this check box to restrict a time reporter from punching out for an unscheduled meal.

Restrict Early In Indicator	Select this check box to restrict a time reporter from punching in early.
Early In Punch Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch in early. If Restrict Early In Indicator is cleared, this field is unavailable for entry.
Restrict Late In Punch	Select this check box to restrict a time reporter from punching in late.
Late In-Punch Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch in late. If Restrict Late In Indicator is cleared, this field is unavailable for entry.
Restrict Early Out Indicator	Select this check box to restrict a time reporter from punching out early.
Early Out-Punch Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch out early. If Restrict Early Out Indicator is cleared, this field is unavailable for entry.
Restrict Late Out Indicator	Select this check box to restrict a time reporter from punching out late.
Late Out-Punch Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch out late. If Restrict Late Out Indicator is cleared, this field is unavailable for entry.
Restrict Early Meal Indicator	Select this check box to restrict a time reporter from punching out early for a meal.
Early Meal Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch in early for a meal. If Restrict Early Meal Indicator is cleared, this field is unavailable for entry.
Restrict Late Meal Indicator	Select this check box to restrict a time reporter from punching in late after a meal.
Late Meal Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch in late after a meal. If Restrict Late Meal Indicator is cleared, this field is unavailable for entry.
Restrict Early Break Indicator	Select this check box to restrict a time reporter from punching in early after a break.
Early Break Margin (Mins)	Enter the number of minutes you will allow a time reporter to punch in early after a break. If Restrict Early Break Indicator is cleared, this field is unavailable for entry.

Restrict Late Break Indicator

Select this check box to restrict a time reporter from punching in late after a break.

Late Break Margin (Mins)

Enter the number of minutes you will allow a time reporter to punch in late after a break. If **Restrict Late Break Indicator** is cleared, this field is unavailable for entry.



You must setup schedules and select the **Send Schedules** check box on the TCD Type Definition page in order to use Restriction Profiles.

TCD Group Page

Usage	Use this page to establish your TCD groups. We group TCDs for Time Reporting purposes.
Object Name	TL_TCDGRP_TBL
Navigation	Define Business Rules, Define Time and Labor, TCD, TCD Group
Prerequisites	TCD ID, Restriction Profile ID, TCD Supervisor ID
Access Requirements	TCD Group ID

TCD Group

TCD Group: KUTCDGRP1

Time Collection Device Group View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Clock 1&2 TCD Group Short Description: TCD Grp1

Restriction Profile ID: KURSTPRF1 Basic Restriction Profile

Time Collection Devices Find First 1-2 of 2 Last

KUTCD1 KUTCD2

Time Collection Device Supervisors Find First 1 of 1 Last

123456

TCD Group page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Effective Date, Status, Description, Short Description.**

TCD Group	This field reflects the value you entered to access this page.
Restriction Profile ID	Select the restriction profile ID you want to use that allows or disallows users to punch in and out.
Time Collection Devices	
TCD ID (non-labeled)	Select the TCD ID of the TCD you want in this TCD group. You can select as many TCDs as you wish to form this group.
Time Collection Device Supervisors	
TCD Supervisor ID (non-labeled)	Select the Supervisor ID of the supervisor who can perform supervisor functions at your TCD in this group.

Sending Time to Your Time Collection Device

PeopleSoft Time and Labor sends (publishes) setup data to your TCD in the form of messages. The system uses an application engine batch process to publish these messages. You run the process using the Publish Setup Data to TCD page. This publish process can be scheduled to run once or multiple times a day. All information contained in one set of published message replaces the previously stored information at the TCD level. The date the system uses to retrieve the information to be sent is always the current date.

Incremental messages are sent when time reporter data changes. An incremental message notifies your TCD of real-time changes that occur in PeopleSoft Time and Labor. Incremental messages are sent when you have changed the data and saved the page for the following situations:

- When you change the time reporter status
- When you change the TCD group associated to the time reporter
- When you make changes to a TCD group

You can choose to send the published messages to all your message nodes/comm servers or you can select specific message nodes or comm servers to which to send the information. You can also choose to have the system generate a TCD Usage report that can include a summary report and a detail report. This report will alert you to the number of values of each kind of reporting element that will be sent to your TCD.

Understanding Enterprise Integration Points

The PeopleSoft Time and Labor time collection device interface uses enterprise integration points (EIPs) along with PeopleSoft Application Messaging technology to send information back and forth between Time and Labor and your TCD. The system uses the following EIPs for this interface:

EIPs

Time and Labor Payable Time Totals by TRC

Time and Labor Reporting Elements

Time and Labor Supervisors

Time and Labor Task Element Code Values

Time and Labor Task Profiles

Time and Labor Task Templates

Time and Labor Time Reporter Data

Time and Labor Time Reporter Elapsed Time

Time and Labor Time Reporter Punch Restriction Rules

Time and Labor Time Reporter Punch Time

Time and Labor Time Reporter Schedules (Outbound)

Time and Labor TRC Information



For more information regarding the technical details for the Time and Labor Time Collection Device Interface supported by these EIPs, see your *Enterprise Integration PeopleBook: EIP Catalog, Areas of Functionality*. For more information about the TCD Interface, see Appendix B: TCD Interface. This appendix provides technical detail about the TCD Interface.

PeopleSoft Time and Labor uses the information you defined on the TCD setup pages to control the data going to your TCD. The system does not send data that your TCD cannot handle. This reduces the amount of information sent over your network and reduces the amount of data the TCD will ignore. The following table summarizes the messages that contain the input data that Time and Labor will provide to various TCDs based on your setup definitions.

Table	Comment
Time Reporter	Contains basic information about the time reporter. Note. Aside from full table synchronized messages to the TCD; we have incremental messages to the TCD. This occurs when you save a page in PeopleSoft Time and Labor. The system triggers an incremental message to the relevant TCDs in the time reporter's TCD Group if a time reporter is active on the Create/Maintain Time Reporter Data pages, or if the time reporter's TCD Groups is changed on the Maintain Time Reporter Data page. These updates to the TCDs are important for TCD access.
Schedule	Contains time reporter's daily schedules.
Restriction Profile	Contains user-defined restriction information.
Total Hours	Contains total hours already worked in the current week. Your TCD displays this information to the time reporter or supervisor.
Time Reporting Code	Contains various TRCs for elapsed time reporting purposes (sick, vacation, holiday, and so on).
TCD Supervisor	Contains a list of supervisors who are authorized to perform supervisor functions at various TCDs.
TCD Task Profile	Contains a list of task profiles associated with each TCD. The system uses task profiles for positive task profile reporting where the time reporter must indicate the type of work being performed.
TCD Task Template	Contains a list of task templates associated with each TCD. The system uses task templates for positive task element reporting where the time reporter must indicate the type of work being performed as well as the labor information. Task templates also identify rule elements. Rule elements define how the time reporter is paid. These are additional task elements the time reporter can report.
Reporting Element tables	Contains a list of countries, states, localities, comp rate codes, currency codes, and override reason code which a time reporter can override when reporting time.



For more information and a graphical presentation about the Interfaces between PeopleSoft Time and Labor and your TCD, see the graphics under the TCD Setup Page located at the beginning of this section.

Publish Setup Data Page

Usage	Use the Publish Setup Data page to publish information for your TCD to retrieve from PeopleSoft Time and Labor
Object Name	TL_TCD_RUN_PNL
Navigation	Administer Workforce, Capture Time and Labor, Process, Publish Setup Data to TCD
Prerequisites	TCD Type Definition, TCD Setup, TCD Supervisor, TCD Restriction Profile, TCD Group
Access Requirements	Run Control ID

Publish Setup Data page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **User ID**, **Run Control ID**.

All Msg Nodes/Comm Servers

Select this option if you want the system to publish the information to all your TCDs (message nodes).

Specific Msg Nodes/Comm Servrs

Select this option if you want the information to be sent to a specific message node, or TCD.

Generate TCD Usage Report

Select this check box if you want the system to generate a TCD Usage report for this TCD run.

Summary Report

This check box is automatically selected and appears when you select the **Generate Report** check box. The summary determines the number of values being sent for each reporting element.

Detailed Report

Select this check box if you want the system to generate a detail report for all the values being sent for this TCD run. You must select **Generate Report** for this field to be available for entry.

Message Node/Comm Servers**Message Node Name**

Enter the name of the message node to which you want to send the information. If **Specific Msg Nodes/Comm Servrs** is not selected, this field is unavailable for entry.

Receiving Time From Your Time Collection Device

You must kick off the Publish process from your TCD in order to receive time data into PeopleSoft Time and Labor. The values displayed on the Elapsed and Punch Time Error pages come directly from information received from your TCD. If errors are not found, the data proceeds directly to the reported timetables. The system validates the information, which includes standard format edits, translates badge IDs to EmplIDs, and creates reported time entries. Time is also populated in the Reported Time tables and then run through Time Administration to create payable time when you have the Automatic Rules Run selected on the TL Installations page.

PeopleSoft Time and Labor receives your time data using the PeopleSoft Application Messaging publish and subscribe technology. Application Messaging uses enterprise integration points to receive information from your TCD.



For more information regarding the enterprise integration points this feature uses, see Understanding Enterprise Integration Points discussed earlier in this section.

A time reporter can report time at more than one TCD; therefore, the system accepts data for a time reporter from multiple sources at the same time.

If errors are not resolved, they will never get sent to Reported Time and will remain in your TCD error queue.



These pages are not intended for the casual user. The user fixing the errors will need to know the interface data structure in detail and possibly could be the person who programmed the interface for your TCD.

The TCD error queue will stop time from proceeding to Reported Time if it finds invalid data for certain fields. Otherwise time proceeds to Reported Time where it will get validated. Validation will catch such items as an invalid task profile ID, location, country, state, or locality.

TCD Error Queue Stops if Invalid

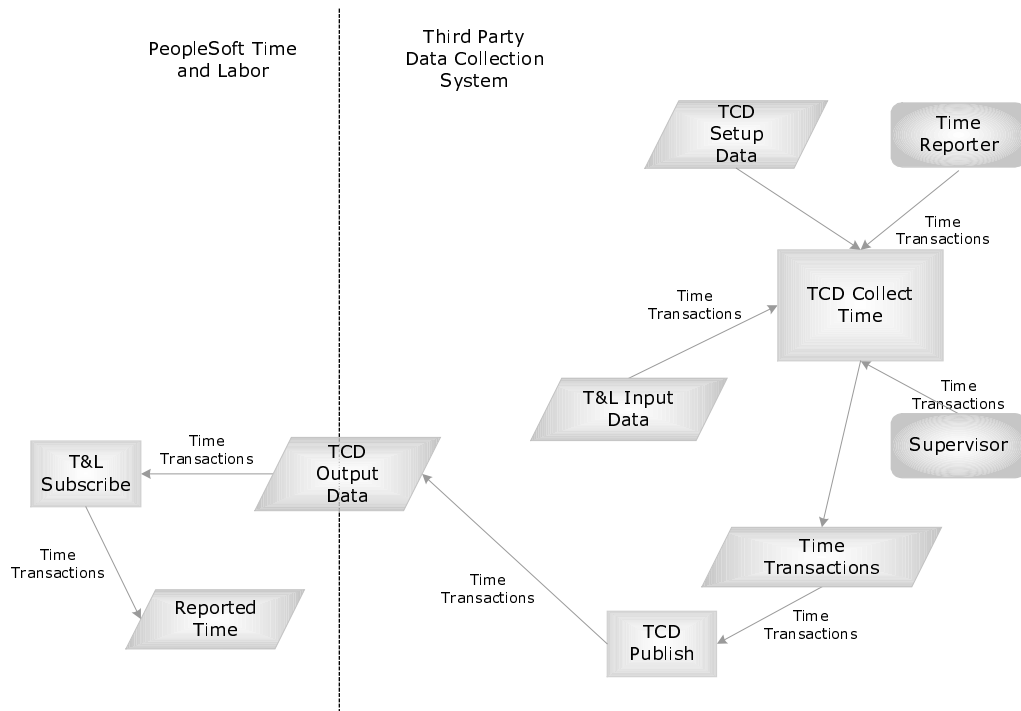
- EMPLID

- EMPL RCD
- BADGE ID
- TASK ELEMENT CODES
- DUR (Date Under Report)
- PUNCH DATE/TIME
- ADD/DELETE INDICATOR
- DELETE DATE

TCD Error Queue Does Not Stop the following elements if they are invalid, as these will be validated as Reported Time is created:

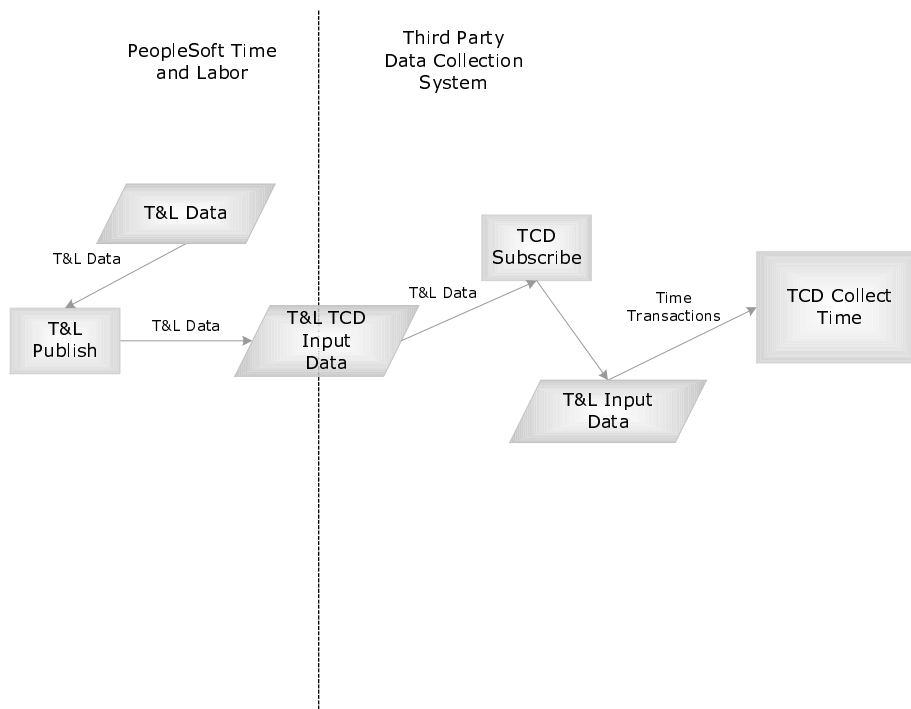
- Task Template ID – task profiles or Task Element Codes are populated, will send a blank value for an invalid taskgroup.
- Task Element Values
- Time Zone
- Override Reason Code
- Task Profile ID
- Location
- Country
- State
- Locality

The following graphic depicts how PeopleSoft Time and Labor collects data from your TCD.



PeopleSoft Time and Labor Collects Data from your TCD

This next graphic depicts how PeopleSoft Time and Labor publishes information to your TCD.



Your Time Collection Devices Sends Data Back to PeopleSoft Time and Labor

Integrating with PeopleSoft Mobile Time and Expense

PeopleSoft Time and Labor integrates with PeopleSoft Mobile Time and Expense. Mobile Time and Expense uses the TRCs from Time and Labor for time entry, and then sends elapsed time information to PeopleSoft Time and Labor for further processing and ultimately the creation of payable time. The process uses our publish and subscribe technology. We like to think of PeopleSoft Mobile Time and Expense as an in-house TCD; however, you do not have to setup any TCD pages for this interface.



For more information about the data structure for the time collection device interface, see Appendix A: Exceptions and Validations of this PeopleBook. For more information about Integrating with PeopleSoft Mobile Time Expense, see Integrating with PeopleSoft Financials in this PeopleBook.

TCD Error Queue Page

Usage	Use the TCD Error Queue to view time subscribed from your TCD.
Object Name	TL_ERROR_QUEUE
Navigation	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue
Prerequisites	Publish Time from your TCD
Access Requirements	None.

TCD Error Queue

TCD Message Type:

Time Collection Device Interface Errors				
Find View All First 1 1-2 of 2 2 Last				
	Subscription Date Time	Message Type	Publishing Node	Publication Id
	07/13/2000 2:11PM	Elapsed	H800R7QA	1
	07/13/2000 2:37PM	Punched	H800R7QA	2

TCD Error Queue page

Click the **Detail (need icon picture)** button to view TCD punch time errors and data elements you can enter for the time, and to view punch or elapsed time error attributes.

Subscription Date Time

The system displays the date and time the punch or time was received by PeopleSoft Time and Labor.

Message Type

The system displays if the message is for punched or elapsed time.

Publishing Node

The system displays the publishing node from which the information was subscribed. It is either the node you established during your TCD setup, or it is the system node used with PeopleSoft Mobile Time and Expense.

Publication ID

The system displays a unique ID for the error message. A message may contain more than one punch or time entry.

TCD Elapsed Time Errors Page

Usage	Use the Elapsed Time Errors page to fix and view errors to time sent from your TCD.
Object Name	TL_ELAPSED_ERROR
Navigation	Administer Workforce, Capture Time and Labor, Inquire, TCD Elapsed Time Errors
Prerequisites	Time needs to be reported at your TCD and published to PeopleSoft Time and Labor
Access Requirements	Subscription Date and Time

TCD Elapsed Time Errors Elapsed Time Attributes

Subscription Date Time: 07/13/2000 2:11PM Resubmit to Reported Time ☐

Elapsed Transaction View All First 1 of 3 Last

*EmpID: [] *Add/Del Ind.: [A] [] [+ -]

Empl Rcd Nbr: [0] [] Delete Date: [] [BT]

Badge ID: [] Sequence number: [0]

Date Under Report: [02/07/2000] [BT] TRC: [REG] Quantity: [8.000000]

Transaction Errors First 1 of 1 Last

Field Name: EMPLID

Message Text:

Field is required. (15,8)

Transaction Task Elements First 1 of 1 Last

*Task Element Code: [] [] [+ -]

Task Element Value: []

TCD Elapsed Time Errors page

Subscription Date Time

The system displays the subscription date and time the message was received by PeopleSoft Time and Labor.

Resubmit to Reported Time

Select this check box to submit the corrected time to reported time. When you save the message, the system will submit all resolved transactions within the message to reported time.

Elapsed Transaction

EmplID

The system displays the time reporter ID for the time reporter. You can change this value if this is the field in error for the reported time. Your TCD must send either **Badge ID**, or **Empl ID** and **Empl Rcd Nbr**.

Empl Rcd Nbr

The system displays the **Empl Rcd Nbr** for the time reporter. Your TCD must send either **Badge ID**, or **Empl ID** and **Empl Rcd Nbr**.

Badge ID

The system displays the badge ID for the time reporter if badge ID is data your TCD contains. Your TCD must send either **Badge ID**, or **Empl ID** and **Empl Rcd Nbr**.

Add/Delete Indicator

The system displays **Add** or **Delete** depending on the action the system should take for the time. If the time should be added to reported time, the system will add the time entry to reported time. If the time should be deleted, the system deletes all time for the entire day. You can change or enter this value if it is the field in error.

Delete Date

The system displays the delete date for this message. This field is required if the value for **Add/Delete Indicator** is **Delete**. You can change or enter this value if it is the field in error.

Sequence Number

The system displays a unique identifier for the time being reported.

Date Under Report

The system displays the date under report for the time being reported. This element is always required.

TRC

The system displays the TRC for the reported time. You may need to convert numeric code to character code depending on your TCD requirements.

Quantity

The system displays the quantity for the TRC for the time being reported. This field can represent hours, amount, or units.

Transaction Errors

Field Name

The system displays the name of the field causing the error for the time.

Task Element Code

The system displays this field for informational purposes in case the task element code is causing the error.

Message Text

The system displays the error message for the time being reported in error.

Transaction Task Elements

Task Element Code	The system displays, or you can select, the task element code you want to send to Reported Time for this time being reported.
Task Element Value	The system displays, or you can enter, the task element value you want to send to Reported Time for this time being reported.
OK (Button)	Click on this button to save your changes without sending the time to Reported Time. The system will keep your changes until you select the Resubmit to Reported Time check box. This is useful if you need to perform research on the punch before submitting it.

TCD Elapsed Time Attributes Page

Usage	Use this page to view or enter additional information for the time being reported that was sent to PeopleSoft Time and Labor from your TCD.
Object Name	TL_ELAPSED_ERROR1
Navigation	Administer Workforce, Capture Time and Labor, Inquire, TCD Elapsed Time Errors, TCD Elapsed Time Attributes
Prerequisites	Time needs to be reported at your TCD and published to PeopleSoft Time and Labor
Access Requirements	Subscription Date and Time

TCD Elapsed Time Errors

Elapsed Time Attributes

Subscription Date Time: 07/13/2000 2:11PM

Resubmit to Reported Time ☐

Elapsed Transaction

View All First 1 of 3 Last

TCD ID: KUTCD2

Currency Code:

Override Rate:

Comp Rate Code:

Billable Indicator: Y

TCD Supervisor ID:

Comments:

Override Reason Code:

Override Date Time: 12/31/98 4:00:00

Task Profile ID: KUTSKPRF3A

Task Template ID:

Country:

State:

Locality:

User ID:

TCD Elapsed Time Attributes page

TCD ID	The system displays, or you can enter, the TCD ID from which this time was reported.
Currency Code	The system displays, or you can enter, the currency code when the quantity for the time equals money.
Override Rate	The system displays, or you can enter, the override rate code for the time being reported.
Comp Rate Code	The system displays, or you can enter, a comp rate code for the time being reported. The code will be used to calculate the time reporter's pay.
Billable Indicator	The system displays, or you can enter, a Billable Indicator with values of Y or N for the time being reported. If populated, the system will use the Billable Indicator in conjunction with costs that it sends to Peoplesoft Projects.
TCD Supervisor ID	The system displays, or you can enter, the TCD Supervisor ID for the supervisor associated with the punch in error.
Comments	The system displays, or you can enter, a comment for this punch. The comment will display on the Weekly or Punch Time Entry pages if this field is selected on the associated Time Reporting Template for the time reporter.
Override Reason Code	The system displays, or you can enter, an override reason code for this time being reported.
Override Date Time	The system displays the date and times the override for the reported time occurred.
Task Profile ID	The system displays, or you can enter, the task profile ID for this time being reported.
Task Template ID	The system displays, or you can enter, the Task Profile template ID for this time being reported.
Country	The system displays, or you can enter, the country for this time being reported.
State	The system displays, or you can enter, the state for this time being reported.
Locality	The system displays, or you can enter, the locality for this time being reported.
User ID	The system displays, or you can enter, the User ID of the time reporter for this reported time.

TCD Punch Time Errors Page

Usage	Use the Punch Time Errors page to fix and view errors to time sent from your TCD.
Object Name	TL_PUNCH_ERROR
Navigation	Administer Workforce, Capture Time and Labor, Inquire, TCD Punched Time Errors
Prerequisites	Time needs to be reported at your TCD and published to PeopleSoft Time and Labor
Access Requirements	Subscription Date and Time

TCD Punched Time Errors

Punched Time Error Attributes

Subscription Date Time: 07/13/2000 2:37PM

Resubmit to Reported Time ☐

Punch Transaction View All First 1 of 4 Last

*EmplID:

Empl Rcd Nbr:

Badge ID:

Punch Date Time: 02/07/2000 8:00AM

*Punch Type:

*Add/Del Ind.:

Delete Date:

Transaction Errors First 1 of 1 Last

Field Name: EMPLID

Message Text: Field is required. (15,8)

Transaction Task Elements First 1 of 1 Last

*Task Element Code:

Task Element Value:

TCD Punched Time Errors page

Subscription Date Time

The system displays the subscription date and time the message was received by PeopleSoft Time and Labor.

Resubmit to Reported Time

Select this check box to submit the time to reported time. When you save the message, the system will submit all resolved transactions within the message to reported time.

Empl ID

The system displays the time reporter ID for this punch. You can change this value if this is the field in error for the punch. Your TCD must send either **Badge ID**, or **Empl ID** and **Empl Rcd Nbr**.

Empl Rcd Nbr

The system displays the **Empl Rcd Nbr** for the time reporter. Your TCD must send either **Badge ID**, or **Empl ID** and **Empl Rcd Nbr**.

Punch Type	The system displays the value for the punch type. Examples are 1 for IN type punch, 2 for OUT type punch, 3 for Meal punch, 4 for Break, and 5 for Transfer.
Badge ID	The system displays the badge ID for the time reporter if one exists. Your TCD must send either Badge ID , or Empl ID and Empl Rcd Nbr .
Add/Delete Indicator	The system displays Add or Delete depending on the action the system should take for the time. If the time should be added to reported time, the system will add the punch to reported time. If the time should be deleted, the system deletes all punches for the entire day. You can change or enter this value if it is the field in error.
Punch Date and Time	The system displays the date and time the punch in error occurred. This field is always required.
Delete Date	The system displays the delete date for this message. This field is required if the value for Add/Delete Indicator is Delete . You can change or enter this value if it is the field in error.

Transaction Errors

Field Name	The system displays the name of the field causing the error for the time.
Message Text	The system displays the error message for the punch in error.

Transaction Task Elements

Task Element Code	Select the task element code you want to send to reported time for this punch.
Task Element Value	Enter the task element value you want to send to reported time for this punch.
OK (Button)	Click on this button to save your changes without sending the time to reported time. The system will keep your changes until you select the Resubmit to Reported Time check box. This is useful if you need to perform research on the punch before submitting it.

Punched Time Error Attributes Page

Usage	Use this page to view or enter additional information for the time being reported that was sent to PeopleSoft Time and Labor from your TCD.

Object Name	TL_PUNCH_ERROR1
Navigation	Administer Workforce, Capture Time and Labor, Inquire, TCD Punched Time Errors, Punched Time Error Attributes
Prerequisites	Time needs to be reported at your TCD and published to PeopleSoft Time and Labor.
Access Requirements	Subscription Date and Time

The screenshot shows the 'Punched Time Error Attributes' page. At the top, there are two tabs: 'TCD Punched Time Errors' and 'Punched Time Error Attributes'. Below the tabs, the 'Subscription Date Time' is displayed as '07/13/2000 2:37PM'. To the right, there is a 'Resubmit to Reported Time' checkbox. The main section is titled 'Punch Transaction' and contains a grid of fields. The fields are organized into two columns. The left column includes 'TCD ID' (KUTCD1), 'Time Zone' (PST), 'TCD Suprv Id' (SUPER1), 'User ID' (PS), 'Override Rsn Cd', 'Action DateTime' (12/31/98 4:00:00), and 'Comments'. The right column includes 'Task Profile ID' (KUTSKPRF1A), 'Template', 'Country' (USA), 'State' (CA), and 'Locality' (PLEASANTON). There are also navigation buttons like 'View All', 'First', '1 of 4', and 'Last'.

Punched Time Errors Attributes page

TCD ID	The system displays, or you can enter, the TCD ID from which this punch error occurred.
Time Zone	The system displays, or you can enter, the time zone from which this punch error occurred.
TCD Suprv ID	The system displays, or you can enter, the TCD supervisor ID for the supervisor associated with the punch in error.
User ID	The system displays, or you can enter, the TCD supervisor ID for the supervisor associated with the punch in error.
Override Rsn Cd	The system displays, or you can enter, an override reason code for this punch.
Action DateTime	The system displays the date and time the punch in error occurred.
Task Profile ID	The system displays, or you can enter, the task profile ID for this punch.
Task Template ID	The system displays, or you can enter, the Task Profile template ID for this punch.

Country	The system displays, or you can enter, the country for this punch.
State	The system displays, or you can enter, the state for this punch.
Locality	The system displays, or you can enter, the locality for this punch.
Comments	The system displays, or you can enter, a comment for this punch. The comment will display on the Weekly or Punch Time Entry pages if this field is selected on the associated Time Reporting template for the time reporter.

Integration Specifications

XML and flat files are both going to be supported methods of integration for the TCD vendor interface. The date/time format for XML is CCYY-DD-MMTHH:MM:SS.ssssss[+/-hhmm]. For example, 1999-09-14T16:47:56.793000-0700.

Flat file integration transmits data between two systems by placing and picking up data in flat files. PeopleSoft Time and Labor and third-party TCD vendors will create flat files based on the table structures listed in Appendix A of this book. The date/time format for flat files is CCYY-DD-MMTHH:MM:SS.ssssss[+/-hhmm]. For example, 1999-09-14T16:47:56.793000-0700.

Each message listed will correspond to a flat file format. All flat files generated will be in the common csv format. This is a comma-delimited file with quotes surrounding each field of data. The first row of each PeopleSoft generated file will be the PSCAMA record. This record, among other things, contains the message sequence and Process Instance.

The first field of each row will be the name of that row's record; this will allow for easy parsing of files with a parent and child record in the file format. Record names can be a maximum of 15 characters. The process instance combined with the message sequence will allow split files to have data that ties them together. For example, if the TIME_DEVICE_EMPL_ATT_FULLSYNC flat file data becomes too large, it will be split into multiple files, but they will all have the same PROCESS_INSTANCE. If a record TIME REPORTERS and child record EMPL_PHONE, which has fields EMPLID, EMPL_RCD and EMPLID, EMPL_RCD, PHONE_NBR respectively, is to be transmitted, here is what the sample files would look like:

File 1(notice the message sequence of H for header)

```
"PSCAMA","ENG","","","H","18","
```

File 2

```
"PSCAMA","ENG","","","","18","
```

```
"TIME REPORTERS","1001","0"
```

```
"EMPL_PHONE","1001","0","800 555-5555"
```

```
"TIME REPORTERS","1002","0"

"EMPL_PHONE", "1002","0","800 555-6666"

"TIME REPORTERS","1003","0"

"EMPL_PHONE", "1003","0","800 555-7777"
```

File 3 (notice the message sequence of T for trailer)

```
"PSCAMA","ENG","","","T","18","
```

Notice that the first field of all rows is the record name, and the other fields are the actual fields of the record definition. Also notice that the process instance is the same for the header, detail, and trailing message.

Files generated by PeopleSoft Time and Labor for the TCD will be of the form [message name]-[comm server ID]-[datetime of form ccyy_mm_dd_hh_mm_ss].csv . Notice that each part of the filename is separated by a hyphen. These files will always be new; PeopleSoft Time and Labor will never append on to an existing file. PeopleSoft recommends that, once the file has been processed by the comm server, it is moved into an archive directory.

Files generated by the comm server for the PeopleSoft Time and Labor will be of the form [message name]-[comm server].csv. The comm server will always append on to the end of the file. Once PeopleSoft has processed the data, it will be removed from the file and placed in an archive file of the form [message name]-[comm server ID]-[datetime of form ccyy_mm_dd_hh_mm_ss]. csv. This will be placed in an archive directory.

The directories where these files are put and picked up from will be part of setup of the PeopleSoft Time and Labor system. We recommend that the TCD Vendor have a similar GUI type of setup. This way none of the programs will have hard-coded path names.

The most seamless flat file integration will have little to no manual steps for the user; the integration will be completely controlled by scheduled processes. Process schedulers will exist on the PeopleSoft side and should also exist on the TCD vendor side. At a specified time, a scheduled process will poll a directory to find files (punched and elapsed time) that follow the naming convention specified above. The TCD Vendor's process scheduler should regularly initiate a process which polls a directory for the TCD setup data. The TCD Vendor process scheduler should also regularly initiate a process that appends time on to the punched and elapsed time flat files. Schedulers should be strategically timed so that there is very little risk of contention. For example, the TCD vendor's population of the punched and elapsed time flat files could be at 2am every morning and then PeopleSoft's extraction of data from these files could be at 4am every morning. Also, any system that is reading from or writing to a file should force that file to be inaccessible to all other systems.

CHAPTER 15

Managing Time

Our managing time pages provide an innovative means for you to manage the time reporting process. The managing time process begins with reported time. Once time has been reported, you may need to approve the time, resolve exceptions, modify the time, or create adjustments to the time once it has already been paid.

By setting up system security, you can determine which pages display for what type of user. For example, maybe you want a data entry clerk to only view reported or payable time. The Operator ID for the data entry clerk will determine which page appears. In this case, the user can only view the time without making changes. Or, in another case, you may want a user to be able to adjust time that has already been paid, but not approve the time. Again, the Operator ID will determine which Page appears; in this case, the Adjust Page will be accessible.

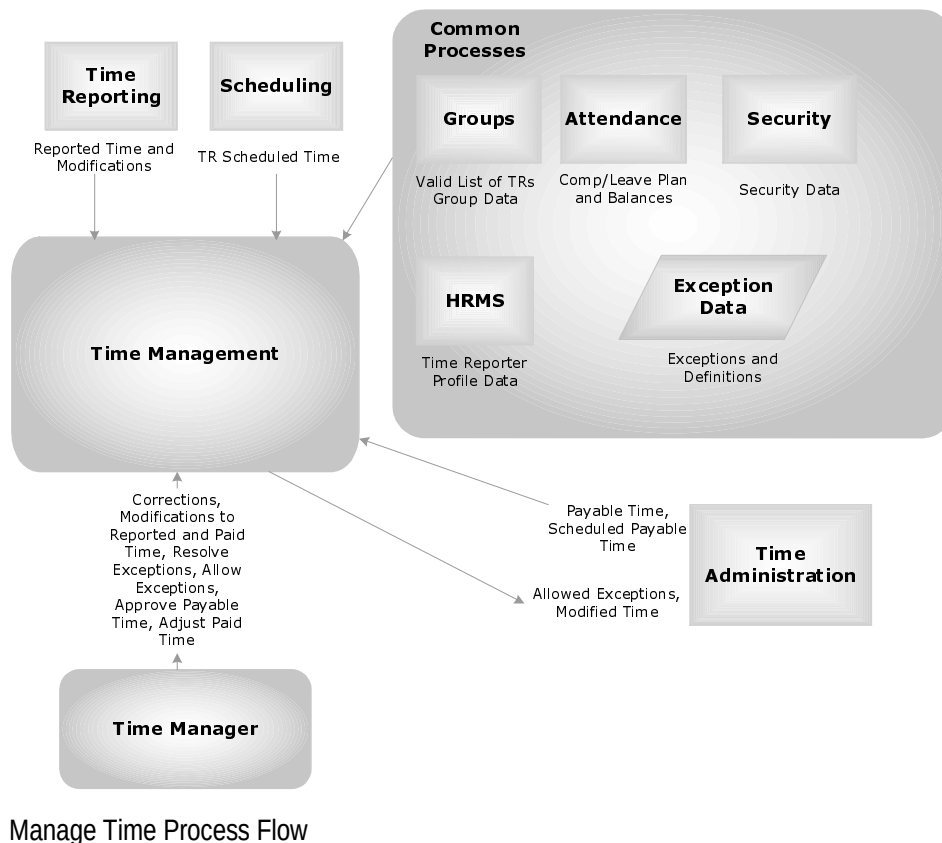


For more information about Group and Time and Labor security, see Establishing Static and Dynamic Groups, and Establishing Time and Labor Security.

To perform time management functions, use the following pages:

- To view payable time, go to the View Payable Time Summary and Detail pages.
- To change reported time, go to the Weekly Elapsed Time Page, Weekly Punch Time Page, or Rapid Entry Page.
- To approve time, go to the Approve Payable Time by Employee or Group pages.
- To view forecasted payable time, go to the View Forecasted Payable Time pages.
- To view and allow exceptions, go to the Manage Exceptions pages.
- To view Exception History, go to the Exception History Page.
- To view an audit of punch and elapsed time, go to the Punch Time Audit Page or Elapsed Time Audit pages.
- To adjust paid time (Record-Only adjustment), go to the Record Only Adjustment Page.
- To override rules for a given day, go to the Override Rules – Time Reporter Page.

The following graphic depicts the interaction between time reporting, scheduling, the time manager, and other common areas within the application with the Manage Time pages:



Standard Element Definitions for the Manage Time Components

Job Title	The system displays the Job Title of the time reporter for which the time was reported.
ID	The system displays the Time Reporter Empl ID for the reported time.

Approving Time

The need to approve payable time is controlled by users; there is no formal automatic approval process. Payable time only needs approval if:

- The Needs Approval check box is selected on the employee's workgroup setup page in Define Time and Labor, Setup 1, Workgroup.
- The Time and Labor indicator on the Job record indicates that the employee's time does not go to a payroll system.
- The user has written a rule that identifies the employee's time is time that must be approved.

You can view and approve payable time in either the single employee page or the group equivalent. The page displays all time for your Time Reporter who has time with a Payable Status of ***Needs Approval***.

Approving Time for Non-Employees

PeopleSoft Time and Labor normally finalizes time when it is sent to payroll. However, if time is not being sent to payroll for processing, such as in the case of non-employees, PeopleSoft Time and Labor needs to finalize the time by approving it. This is important when sending costs to PeopleSoft Projects. To finalize the time for your non-employees (whose time is not being sent to payroll) you will need to clear the **Send Time to Payroll** check box on the Maintain TR Data page, which indicates to the system that the time needs approval. Then, when time is approved either online or during batch processing, the system will close the time and it can be sent to Projects.

Approve Payable Time Page

Usage	Use this page to approve either individual time incidences or all incidences within the date range specified.
Object Name	TL_MNG_PAY_DET_PNL
Navigation	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time
Prerequisites	None
Access Requirements	Enter an employee ID and record number. Enter the from and to dates for the range that you want to view.

Approve Payable Time

Cynthia Rogers

ID: KC0003

Job Title: Accounting Clerk

Approve Payable Time From 01/03/2000 To 02/02/2000

*Date	Approve	Payable Status	Time Reporting Code	Quantity	TRC Type	Taskgroup	More...
01/03/2000	☒	Needs Approval	KUHOL	4.000000	Hours	KUTSKGRP1	More...
01/03/2000	☒	Needs Approval	KUHOL	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	☐	Needs Approval	KUOVT	0.500000	Hours	KUTSKGRP1	More...
01/04/2000	☐	Needs Approval	KUOVT	0.500000	Hours	KUTSKGRP1	More...
01/05/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/05/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/05/2000	☐	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/05/2000	☐	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/06/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/06/2000	☐	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...

Approve Payable Time Page**Approve**

Select this check box to approve a single instance of reported time for this Time Reporter.

Date

The system displays the date of the day the time was reported for the payable time to be approved.

Payable Status

The system displays the status of the payable time and a description of the **Payable Status** for the payable time to be approved. Values are: *Approved-Goes to Payroll, Closed, Paid-Labor Diluted, Estimated – Ready for Payroll, Needs Approval, Paid – Labor Distributed, Rejected by Payroll, Sent to Payroll, Taken – Used by Payroll.*

For more information about these values and their descriptions see PeopleSoft 8 Time and Labor, “Understanding Payable Time” in this PeopleBook.

Time Reporting Code

The system displays the Time Reporting Code for the payable time to be approved.

Quantity

The system displays the Quantity for the TRC of the payable time to be approved.

TRC Type

The system displays the **TRC Type** for the TRC of the payable time to be approved.

Taskgroup	The system displays the Taskgroup for the payable time to be approved.
More	Click the More hyperlink to view details about the reported time. The More Payable Time Information secondary page displays to view additional fields for the time.
Select All	Click the Select All button if you want to approve all the payable time records displayed on the page for this Time Reporter.

The More Payable Time Information page is accessible from the Adjust Paid Time, Approve Payable Time, and View Payable Time pages. For a description of the elements on the More Payable Time Information page, see Adjusting Time, More Payable Time Information in this section.

Approve Payable Time (Group) Page

Usage	Use this page if you want to approve the payable time for all the employees in a time reporting group.
Object Name	TL_MNG_GRP_APPROVE
Navigation	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time (Group)
Prerequisites	Time must be processed through Time Administration and have a payable time status of Needs Approval.
Access Requirements	Enter a (time reporter) group ID. Enter the start and end dates of the range that you want to approve.

Approve Payable Time (Group)

Approve Payable Time for a Group

Group Information

Group ID: KUDY1 Canadian Workgroup Dyn Group

Payable Time From 01/03/2000 To 01/28/2000 [View All](#) [First](#) [1](#) 1-3 of 3 [Last](#)

Approve	Approval Status	Name	Job Code Description	Actual Hours	Total Hours	More ..
☒	All Approved	Rogers,Cynthia A	Accounting Clerk	168.000000	168.000000	More ..
☐	Needs Approval	Reid,Charles M	Payroll Clerk	40.000000	40.000000	More ..
☐	Needs Approval	Reid,Charles M	Human Resources Analyst	156.000000	156.000000	More ..

[Approve All](#)

Approve Payable Time (Group) page

Approve

Select this check box in order to approve a single instance of reported time for a Time Reporter in this group. The system displays a description of the Payable Status for the payable time to be approved.

Approval Status

The system displays the **Approval Status** of the payable time that was either approved or needs approval.

Name

The system displays the name of the time reporter for which the time was reported.

Actual Hours/Total Hours

Each row of the grid displays the **Actual Hours** and **Total Hours** for a time reporter in the group. In PeopleSoft Time and Labor, you keep such things as shift differentials and shift bonuses (compensation only hours) separate from the actual hours of effort reported. The **Actual Hours** are based on the daily time records that the system has created (that is, compensation only hours are not included). **Total Hours**, (or Total Amount or Total Units) represent all hours (amounts or units) for that day, including compensation only hours, amounts or units.

The actual and total hours are reflective of all the payable time that exists for the time reporter for the dates displayed.

More

Click the **More** button to view the details of the time. A secondary page displays that you can also use to approve reported time.

Approve All

Click the **Approve All** button if you want to approve all the payable time records for this group for this date range.

Approval Details Page

Usage	Use the Approve Details page to view and approve reported time.
Object Name	TL_MNG_PAY_GRP_DET
Navigation	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time (Group), Approval Details
Prerequisites	Time must be processed through Time Administration and have a payable status of Needs Approval.
Access Requirements	Group ID and Date Range

Approval Details
Cynthia Rogers
Personal Information
ID: KC0003

Approval Details [View All](#) [First](#) 1-10 of 64 [Last](#)

Approve Payable Status	*Date	Time Reporting Code	Quantity	More...
☒ Needs Approval	01/03/2000	KUHOL	4.000000 Hours	More...
☒ Needs Approval	01/03/2000	KUHOL	4.000000 Hours	More...
☒ Needs Approval	01/04/2000	KUREG	4.000000 Hours	More...
☒ Needs Approval	01/04/2000	KUREG	4.000000 Hours	More...
☒ Needs Approval	01/04/2000	KUOVT	0.500000 Hours	More...
☒ Needs Approval	01/04/2000	KUOVT	0.500000 Hours	More...
☒ Needs Approval	01/05/2000	KUREG	4.000000 Hours	More...
☒ Needs Approval	01/05/2000	KUREG	4.000000 Hours	More...
☒ Needs Approval	01/05/2000	KUOVT	1.000000 Hours	More...
☒ Needs Approval	01/05/2000	KUOVT	1.000000 Hours	More...

Approval Details page

You can approve time from each page by selecting the **Approve** check box. The system displays all data for the reported time in the appropriate field. If no data exists for the field, it is left blank.

Click the **More** button to access the More Payable Time Information page to view further details about the time that needs approval. For a description of these elements, see Adjusting Time, More Payable Time Information, in this PeopleBook.

Batch Approval Page

Usage	Use the Batch Approval page in order to approve time for a group of employees during a batch process.
Object Name	TL_APPRV_RUNCTL
Navigation	Administer Workforce, Capture Time and Labor, Process, Batch

	Approval
Prerequisites	Run Time Administration to create payable time.
Access Requirements	Run Control ID

Batch Approval

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

*Start Date: 01/03/2000

*End Date: 01/28/2000

EmplID:	Empl Rcd#:	Group ID:	*Include/Exclude Indicator:
KC0003	0		Include

View All First 1 of 1 Last

Batch Approval page

Start Date

Enter the start date for the time reporters who have reported time that you want to include in the batch approval process.

End Date

Enter the end date for the time reporters who have reported time that you want to include in the batch approval process.

EmplID

Enter or select the Employee ID that you want to include or exclude during the approve time process. If you choose **EmplID**, **Group ID** is unavailable for entry for that row.

Empl Rcd #

The system displays the Empl Rcd# for the EmplID. If **EmplID** is blank, this field will be blank.

Group ID

Enter or select the Group ID of the employees that you want to include during the approve time process. If you select a **Group ID**, **EmplID** is unavailable for entry for that row.

Include/Exclude Indicator

You can **Include** or **Exclude** individual employees. For example, enter the **Group ID** for a group of employees, add a row, and enter the Employee ID of the employee whom you do not want to include in the approve time process. Then, choose Exclude for that row. The system will not approve time for that employee, even though they belong to the group. Use the same procedure to add an employee to the group.

Managing Exceptions

Time Managers need to resolve or allow exceptions in order for a Time Reporter's time to become payable time when the exception severity is **Medium** or **High**. The reported time associated with the exception needs to be reviewed and the exception resolved or allowed in order for the system to process and generate payable time. The Time Manager's role starts when something stands out as incorrect with a Time Reporter's time. An exception is a condition that exists regarding a piece of reported time that requires review or attention. These exceptions are either standard exceptions delivered with the system or user-defined. Because each customer has a different idea of what requires their Time Manager's attention, PeopleSoft Time and Labor provides you with the ability to define your own exception criteria.



For more information about setting up exceptions, see Establishing Exceptions in this PeopleBook.

Exceptions are generated when time is reported and either an element about the time is incorrect, or the time does not comply with a user-defined rule. Exceptions may be system-generated by way of validation processes or generated as a result of Time Administration rules. Each exception has a Severity Level associated with it. Exceptions with a severity level of **Medium** or **High** must be resolved or allowed, or the reported time associated with the exception will not become payable time. With the Manage Exception pages you can specify which exceptions you want to allow for a specific time reporter, or a group of time reporters.

To resolve an exception, you need to determine if an error exists with reported time or there is an invalid value in a setup table. If the error is due to reported time (non-setup exception), you must correct the time on the Weekly Elapsed, Weekly Punch, or Rapid entry page, and then process the time again by submitting the time and/or running Time Administration. If the error is setup-related, you may need to change the reported time or change a value in one of the setup tables. To resolve the exception, you correct the time or value and then run Time Administration. For example, if time reporters report TRCs that are not in their TRC programs, you need to either correct the reported time or add the TRC to their TRC programs.

If a **Medium** or **High** exception is not resolved or allowed, it remains in the Exceptions Table and the time will not become payable time. Exceptions with a severity level of **low** will become payable time, and will also remain in the Exceptions Table until the exception is resolved or allowed.

The Allow Exceptions functionality gives you the ability to allow an exception to be processed and generate payable time without having to resolve it. This is especially helpful for

organizations that choose to have informational exceptions created. Consider, for example, exceptions that are created because a Time Reporter is approaching an overtime limit. A Time Manager could be easily notified that the Time Reporter is approaching their overtime limit; however, the Time Manager may want to allow this type of exception for peak season hours in the retail industry. When the peak season is over, they may want to be notified of this exception and resolve it in the off season.

In addition, we provide you with a status indicator for the exception. This Exception Status can aid you in dealing with the exceptions. The four states for the Exception statuses are **Unresolved**, **Resolved**, **Allowed**, and **Changed**. When an exception is created, the status of the exception is **Unresolved**. If you make a modification to time, the system checks the exceptions table to determine if the modification made occurred within the date range of a pre-existing exception. If there is a modification that occurred during the date range of an exception and the exception is not resolved, and then Time Reporting will switch the status to **Changed**. When Time Validation and Time Administration run again, if the exception condition no longer exists, then the status will be switched to **Resolved**.

The changed status helps you to determine if you need to look at the time in order to validate that the exception should still be allowed. You may want to be notified that an exception you previously allowed has now had something changed that may affect that time. If you want to ignore that modification you can simply leave the exception and the selected allowed indicator will remain. If you want to review the time more closely, then you can do so.

You can also view Exception History Information by using the Exception History page. The following conditions determine if the exception information will appear on this page:

- If you set up an Exception ID with the Archive check box cleared, which means “Don’t Archive”, the exception will not appear if you **Resolve** the exception.
- If you set up an Exception ID with the Archive check box cleared, which means “Don’t Archive”, the exception will appear if you **Allow** the exception.
- If you set up an Exception ID with the Archive check box selected, which means Archive, the exception will appear when you either **Resolve** or **Allow** the exception.



For more information about viewing exception history, see Exceptions History in this chapter.



All exceptions delivered with the system have a Severity Level of **High** and are not allowable. Therefore, you must resolve delivered exceptions (unless you changed them in the Exception setup table so that they are allowable) in order for the system to create payable time for the time reporter in these instances.

Defining Exception Conditions

Using the power of Time Administration, you can define all the conditions that you feel require a manager's review when time is reported and before it becomes payable time. These can range from the obvious examples of someone missing a punch or someone punching in late, to the less obvious examples of someone working more than eight hours of overtime or someone being tardy ten times in the last month. In this way, you only have to focus on the elements of reported time that are important to your organization.



For more information about creating exception definitions, see *Setting Up Your Basic Tables, Establishing Exceptions* in this PeopleBook. For more information about delivered exceptions and validations, see *Appendix A: Exceptions and Validations*.

Validating Time and Creating Exceptions

Reported time entered through PeopleSoft Time and Labor weekly time entry pages is validated online (before Time Administration processing). Time that is reported by Rapid Time Session, Mass Time, GP Absence Entry, or a TCD Interface does not have online validation, and must go through a Submit Time process so that the system can create exceptions for invalid data. The Submit Time process triggers a Time Reporting Validation process, which generates exceptions for any invalid data that was a result of either time being reported or a problem with setup data. Any exceptions generated from this process are then displayed on the Manage Exceptions or Manage Group Exceptions pages.

On the Manage Exceptions pages, time managers review the exceptions and determine if reported time needs to be adjusted or if a setup table value needs to be added or changed to resolve the exception. An example of a setup-related exception is if time reporters report time using a new TRC, but that TRC has not yet been added to their TRC Program. Because the TRC is not in the time reporters' TRC program, an exception is generated stating "TRC not in the TRC Program." An exception stating "Task Profile not in Taskgroup" is an example of a non-setup or reported time exception that could occur if time reporters report task profiles that are not valid for their taskgroup.

To resolve non-setup related exceptions, you can correct reported time using the Weekly Elapsed or Weekly Punch Time Reporting pages. You can also allow the exceptions if you have previously defined the exception definition as allowable. All system-delivered exceptions are defined as High severity and are not allowable. Exceptions with a severity level of High or Medium do not generate payable time, and therefore must be resolved.

Once you have resolved the issues by adjusting the reported time or setup values, return to the Manage Exceptions pages and click the Clean Up Exceptions button. This button runs the process that examines the reported time where an exception exists, and will change the status of that time to *Resolved* if the exception is no longer valid. This process resolves any non-setup-related exceptions that were generated and have an Exception source of *TVE* or *TVP*. Once the non-setup-related exception has been resolved and the Clean Up Exceptions button pressed, you can run Time Administration to create Payable Time. For example, if a time reporter reports an invalid value in the Task Profile field, you must correct the value on the Weekly Time Reporting

page, and then press the Clean Up Exceptions button on the Manage Exceptions page to resolve the exception. You then run Time Administration to create payable time.

For setup-related exceptions that are generated by Time Administration and have an Exception source of *TA*, you may need to change reported time or change a setup value, or again, allow the exception. To clear these exceptions and create Payable Time, you should fix the problem and then run Time Administration. For example, if a time reporter reported time using a TRC that has not yet been added to the appropriate TRC program, you would need to add the new TRC to the TRC program and then run Time Administration to resolve the exception and create payable time. The Referential Integrity process runs and then triggers the validation process. Because the reported data is compared with the changed setup data, the validation process resolves this exception and payable time is created.



Exceptions may be generated based on validation rules invoked by the Submit Time process, or by user-defined rules processed through Time Administration. However exceptions are generated, they must be either resolved or allowed if Time Administration is to process the related reported time into payable time. If you resolve the exception by adjusting reported time, you need to resubmit that (adjusted) reported time so that Time Validation runs again and removes the exception. From the Manage Exceptions page, click the Clean up Exceptions button and then run Time Administration for that time reporter. During the subsequent running of Time Administration, the time will become payable time along with that which you approved, rather than resolved.



For more information about Online Validations, see Introduction to Time and Labor, Understanding Validating Time in this PeopleBook.

Manage Group Exceptions Page

Usage	Use this page to manage exceptions by Group.
Object Name	TL_MNG_EXCEPT_PNL 1
Navigation	Administer Workforce, Capture Time and Labor, Manage, Manage Exceptions by Group
Prerequisites	Time Administration must have already run against the reported time.
Access Requirements	Group ID and Date Range

Manage Group Exceptions					
Group Information					
Canadian Workgroup Dyn Group			Group ID: KUDY1		
Filter Options			Sort By: Except ID		
Exceptions					
First 1-2 of 2 Last					
EmplID	More	Description	Status	Date	Severity
KC0003	TLX00910	Invalid Task Profile	Unresolved	15/02/2000	High
KC0003	TLX00910	Invalid Task Profile	Unresolved	17/02/2000	High
Click this button to resolve non-setup related exceptions once reported time has been corrected using the Weekly Time pages					Clean Up Exceptions

Manage Group Exceptions page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EMPLID**.

Group ID

The system displays the Group ID entered to access the page.

Note. You may view and allow exceptions with a status of **Changed** or **Unresolved** using this page. To view exceptions that have already been resolved or allowed, use the Exceptions History page.

Filter Options

Click the **Filter Options** hyperlink to control which exceptions the system will display for you to approve or resolve. The system will send you to the Filter Exceptions page so that you can set up your filters.

Sort by

Select a value by which you want the system to sort the exceptions. You can sort by **Date** (reported date), **Except ID** (exception ID), **EmplID** (employee ID), **Severity**, and **Status**.

Allow

Select the Allow check box to allow an individual time reporter's exceptions for that date.

Note. If all the exceptions appearing on the page are not allowable, then the **Allow** column and element will be hidden.

More

The system displays the Exception ID code that was either delivered with the system or you defined using the Define Exceptions page. Click the **Exception Id** hyperlink to view the Exception Information details of the exception.

Description

The system displays the description of the Exception that was generated for that time reporter and date.

Status

The system displays the **Status** of the exception. The options are **Changed** or **Unresolved**.

Date	The system displays the Date of the reported time that caused the exception.
Severity	The system displays the Severity of the exception. Severities are High , Medium , and Low . The system does not create payable time for reported time that has an exception Severity of High or Medium . However, the system does create payable time for reported time with an exception severity of Low .
Allow All	Click the Allow all button if you want to allow all the exceptions for the group. Allow all sets the Allow check boxes to Selected. The exceptions can now be processed through Time Administration to create payable time. If you click on the Allow All button again, the system clears the Allow check boxes. Note. If all the exceptions appearing on the page are not allowable, then the Allow column and element will be hidden.
Clean Up Exceptions	Click the Clean Up Exceptions button to resolve all exceptions created by time reporting validations (not setup-related exceptions).

Filter Exceptions Page 1

Usage	Use the Filter Exceptions page to sort your view of the exceptions that display on the Manage Exceptions page.
Object Name	TL_MNG_SORT_FILTER
Navigation	To access the Filter Exceptions – Sort page, click the Filter Options hyperlink on the Manage Group Exceptions page.

The screenshot shows the 'Filter Exceptions' page with a blue header bar. Below the header, there are five filter criteria, each with a dropdown menu and a text input field:

- Date:** The dropdown is set to 'equal to' and the text field is empty.
- Emplid:** The dropdown is set to 'equal to' and the text field is empty.
- Severity Level Of:** The dropdown is empty.
- Exception ID:** The dropdown is set to 'equal to' and the text field is empty.
- Exception Status Of:** The dropdown is empty.

Filter Exceptions page

Date	Select a Date filter for the exception. Valid values are: between , equal to , greater than , or less than .
EmpliD	Select an EmpliD filter for this exception. Valid values are: equal to , greater than , less than , or like .

- Severity Level Of** Select a **Severity Level** filter for this exception. Valid values are: *High, Low, or Medium*.
- Exception ID** Select an **Exception ID** filter for this exception. Valid values are: *equal to, like, not equal to, not like*.
- Exception Status of** Select an **Exception Status** filter for this exception. Valid values are *Changed* or *Unresolved*.

Exception Information Page

Usage	Use the Exception Information page to view details about the exception.
Object Name	TL_MNG_EXC_SEC_PNL
Navigation	To access the Exception Information page, click the Exception ID hyperlink on the Manage Group Exceptions page.

Exception Information

Exception Information

Personal Information

EmplID: KC0003
Name: Rogers,Cynthia A

Source Of Exception

Date: 02/15/2000 **Exception Id:** TLX00910 **Source:** TVE
Status: Unresolved **Resolved by:** **Action DateTime:** 07/12/2000 11:35:55AM

Exception Context

Exception Data: The reported Task Profile: JSTSKPRF1A is invalid as of this date.

Description: The reported Task Profile is not found in the Task Profile table as of this date.

Comments

Exception Information page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Empl ID, Name**.

Source of Exception

Date The system displays the **Date** the exception was generated by the system.

Exception Id	The system displays the Exception Id . This exception could either be a system-delivered exception or one that you defined using the Define Exceptions pages.
Source	The system displays the Source of the process that created the exception, such as Time Administration or Time Validation.
Status	The system displays the current status of the exception.
Resolved by	The system displays the Operator ID of the person who resolved or allowed the exception.
Action Date Time	The system displays the date and time when the exception was resolved or allowed.

Exception Context

Exception Data	The system displays the message that contains the actual values that were entered that caused the exception such as “The reported TRC BNKR is invalid.”
Description	The system displays more details about the exception to help you troubleshoot the problem.
Comments	Enter any Comments you like about how or why the exception was allowed or resolved.

Manage Time Exceptions Page

Usage	Use this page to manage exceptions one employee by employee, all dates.
Object Name	TL_MNG_EXCEPT_PNL3
Navigation	Administer Workforce, Capture T&L, Manage, Manage Exceptions
Prerequisites	None
Access Requirements	Enter an employee ID or name. Refine the search to a specific department if necessary.

Manage Time Exceptions

Cynthia Rogers ID: KC0003

Job Title: Accounting Clerk

[Filter Options](#) **Sort By:** Except ID ▾

Exceptions				
First 1-2 of 2 Last				
More	Description	Status	Date	Severity of Exception
TLX00910	Invalid Task Profile	Unresolved	15/02/2000	High
TLX00910	Invalid Task Profile	Unresolved	17/02/2000	High

Click this button to resolve non-setup related exceptions once reported time has been corrected using the Weekly Time pages [Clean Up Exceptions](#)

Manage Time Exceptions page

This page is identical to the Manage Group Exceptions page, you Filter Exceptions using the Filter Options hyperlink, and view additional information about the exception using the Exception ID hyperlink. The only difference between Manage Exceptions by Group and Manage Exceptions by Employee is that you can only view exceptions for one employee at a time and therefore, cannot sort or filter by EMPLID on the Manage Exceptions page.

Filter Exceptions Page 2

Usage	Use the Filter Exceptions page to filter out exceptions that you do not want to view on the Manage Exceptions page.
Object Name	TL_MNG_EX_FILTER
Navigation	To access the Filter Exceptions page, click the Filter Options hyperlink on the Manage Time Exceptions page.

Filter Exceptions

Date: equal to ▾ 

Severity Level Of: ▾

Exception ID: like ▾ TLX0001

Exception Status Of: ▾

Filter Exceptions page

The only difference between this page and the Manage Exceptions by Group Filter Exceptions page, is the Empl ID, you Filter Exceptions using the Filter Options hyperlink.

Exceptions History Page

Usage	Use the Exception History page to view exceptions that have been resolved or allowed. This page is useful in tracking exception history.
Object Name	TL_AUD_EXCEPT_PNL
Navigation	Administer Workforce, Capture Time and Labor, Inquire, View

	Exceptions History
Prerequisites	Reported Time must have been run through Time Administration and the exception that was generated must have either been allowed or resolved.
Access Requirements	Enter an employee ID.

Exceptions History

Charles Reid ID: KC0004

Job Title: Payroll Clerk

[Filter Options](#) Sort By: Except ID

Exceptions				
Exception Id	Description	Status	Date	Severity
Exception Id			08/28/2000	

First 1 of 1 Last

Exceptions History page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID**, **Job Title**.

Exceptions

Exception Id

Click the **Exception Id** hyperlink to view details of the resolved or allowed exception. See the Exception Information page under Managing Exceptions for a description of the fields that appear here.

Description

The system displays the description of the Exception. This description is the Exception Text either delivered with the system or that you established when you set up your exceptions.

For more information about delivered Exceptions and their Descriptions, see PeopleSoft 8 Time and Labor, "Appendix A: Exceptions and Validations" in this PeopleBook.

Status

The system displays whether the exception was **Resolved** or **Allowed**. In order to view and allow **Unresolved** or **Changed** exceptions, see the Manage Exceptions page.

Date

The system displays the **Date** for the time being reported.

Severity

The system displays the **Severity** of the exception. Severity values are **High**, **Medium**, and **Low**. The system will not create payable time or pass the time to payroll for exception severities of **High** or **Medium** until they are either allowed or resolved by the user. However, the system will create payable time for reported time with an exception severity of **Low**.

The Exception ID hyperlink is the same one used to Manage Exceptions. See Manage Exceptions by Group, Exception Information Details for an explanation of those fields.

Filter Exceptions Page 3

Usage	Use the Filter Options page to filter the exceptions you want to view.
Object Name	TL_AUD_EXCEP_FLTR
Navigation	To access the Filter Exceptions page, click the Filter Options hyperlink on the Exceptions History page.

The screenshot shows a web form titled "Filter Exceptions". It contains four rows of input fields:

- Date:** A dropdown menu set to "between", followed by two date pickers showing "08/01/2000" and "08/31/2000".
- Severity Level Of:** A dropdown menu.
- Exception ID:** A dropdown menu set to "equal to", followed by a text input field.
- Exception Status:** A dropdown menu.

Filter Exceptions page 3

The Filter Options page functions the same as the Filter Options on the Manage Exceptions by Group page. See Manage Exceptions by Group, Filter Exceptions page for a description of these elements.



For more information about how rules processes and creates exceptions, see Understanding Batch Processing, Step 12 - Process Exceptions in this PeopleBook.

Adjusting Time

Occasionally you may need to make an adjustment to payable time that has already been paid by Payroll, or has been closed. This type of adjustment is called a Record Only Adjustment and is made using the Adjust Paid Time page. When you make an adjustment of this type, it is for record keeping purposes only. The time you add or adjust is not processed by PeopleSoft Time and Labor nor is the time passed onto Payroll. For example, a time reporter may have forgotten to report some vacation time taken in the last time reporting period. Payroll is notified, their system updated with the time, and a manual check is cut for the employee. In order to keep your payroll and PeopleSoft Time and Labor systems in sync, you need to go into PeopleSoft Time

and Labor and record that time for record keeping purposes. Because the time has already been paid by payroll and their system adjusted, it does not need to be passed to Payroll again. This feature allows you to keep your Time and Labor system in sync with your Payroll system, without re-sending or processing duplicate data.

Using the Adjust Paid Time page, you can add new time, delete time, or make changes to existing time that has already been processed by NA Payroll and has a Payable Status of Paid - Labor Diluted, or Paid – Labor Distributed. You also can adjust time that has a status of Closed (for example, time reported by Contractors that does not get sent to payroll). All the time reporting fields appear on the page for editing. You can change any field except the Date, Payable Status, and Type fields. Once adjustments have been made to time using this page, the system does not process the time further. It does not run it through Time Administration, create payable time, or pass the time to Payroll. PeopleSoft Time and Labor does pass the project information to your PeopleSoft Projects application. If Comp Time is reported, the system will also process Comp Time information and adjust the time reporter's Comp Time balance the next time the Time Administration process is run for that time reporter.

When you modify existing time, the system will create Offsets. The system will create Offsets to “back out” the originally reported time, and then add in the new time that you have entered. For example, if you originally reported 2 hours of Overtime and then go in and adjust that to 4 hours, the system will generate 3 rows of data like the following:

<i>Date</i>	<i>Quantity</i>	<i>TRC</i>
08/01/2000	2	OT (Overtime
08/01/2000	-2	OT (Overtime)
08/01/2000	4	OT (Overtime)

The first row is the original 2 hours of OT, the second row is the offset that “backs out” the original 2 hours, and the third row is the new time that your are reporting. The offsets do not display on the Adjust Paid Time page, but you can view them on the View Payable Time page.



For more information about Time and Labor's interface with PeopleSoft Projects, see Integrating with PeopleSoft Financials, PeopleSoft Projects Integration. For more information about making changes to reported time using the Weekly Elapsed Time and Weekly Punch Time pages, see Overview of Reporting Time in Using self-service components.

Record Only Adjustment Page

Usage	Use this page to make 'Record Only' adjustments for individual employees or for non-employees.
Object Name	TL_MNG_PAT_DET_PNL
Navigation	Administer Workforce, Capture T&L, Manage, Adjust Paid Time
Prerequisites	Time has been reported and processed through Time Administration.

Access Requirements	Enter an employee ID and select a job if they have more than one. Enter the date range of the reported time incidences in which you want to make an adjustment.

Record Only Adjustment

Adjust Paid Time

Martina Griffiths ID: KC0001

Job Title: Senior Secretary

Payable Time From 01/30/2000 To 02/29/2000

Date	Payable Status	Time Reporting Code	Quantity	TRC Type	Taskgroup	More...
02/01/2000	Closed	KUOVT	2.000000	Hours	KUTSKG	More...

Record Only Adjustment page



If you change or add Leave Time Taken, you will have to manually change the Leave hours in your HR database. The system will not adjust your Leave Balances. The system will however, adjust Comp Time Balances for changes or additions.

Date	Enter the date you want to adjust for the time that was paid.
Payable Status	The system displays the Payable Status for the reported time. The values that will display on the Adjust Paid Time page are Closed , Paid-Labor Diluted , and Paid – Labor Distributed .
Time Reporting Code	Enter the Time Reporting Code (TRC) that you want to use to adjust the time, or leave the field blank. The system uses TRCs to track time reporter time to support all of your administrative and compensation needs, such as payroll processing, or to collect Labor Distribution information.
Quantity	Enter the Quantity that you want to use for the Time Reporting Code for the reported time. Values are Amounts , Units , or Hours depending on the Time Reporting Code entered.
TRC Type	The system displays the TRC Type (Amounts, Units, or Hours) based on the Time Reporting Code that you entered to adjust the time. This is a display only element.

Taskgroup

Select the Taskgroup for the time you want to adjust. The system will display the appropriate task elements on the More Payable Time Information secondary page depending on your selection.

More

Click on the **More** hyperlink for details for the time you want to adjust. A secondary page displays that you can use to adjust additional fields for the time.

More Payable Time Information

More Payable Time Information

Martina Griffiths

Change any of the following fields and press the Ok or Cancel button at the bottom when finished

Time Reporting Elements	
Date:	02/01/2000
Payable Status:	CL Closed
Approval Process Datetime:	
Taskgroup:	Task Grp for Template & Prfl 1
Time Reporting Code:	Overtime
Quantity:	2.000000
TRC Type:	Hours
Billable Indicator	☐
Currency:	
Override Rate:	
Rate Code:	
Country:	
State:	
Locality:	

More Payable Time Information Page (1 of 2)

Task Reporting Elements	
Product:	
Customer:	
Task:	
Perf Meas Business Unit:	
Activity ID:	
User ID:	
Publish Switch:	
Publish Date:	
Estimated Gross:	
Labor Distribution Amount:	
Diluted Labor Distribution Amt:	

More Payable Time Information Page (2 of 2)

Time Reporting Elements

Date	The system displays the date you entered on the Adjust Paid Time page.
Payable Status	The system displays a description of the Payable Status for the payable time to be approved. The values that will display on the Adjust Paid Time page are <i>Closed, Paid-Labor Diluted,</i> and <i>Paid – Labor Distributed..</i> For more information about these values and their descriptions see PeopleSoft 8 Time and Labor, “Understanding Payable Time” in this PeopleBook.
Approval Process Datetime	The system displays the date and time this reported time was approved. This is a display only element.
Taskgroup	The system displays the taskgroup name for the taskgroup you entered on the Adjust Paid Time page, or you can select the Taskgroup you want to use for the adjusted time here. The Task Reporting Elements defined for the taskgroup will appear at the bottom of the page under Task Reporting Elements.
Time Reporting Code	The system displays the TRC that you entered on the Adjust Paid Time page. Or, if it is blank, you can enter the TRC for the payable time you want to adjust.
Quantity	The system displays the Quantity that you entered on the Adjust Paid Time page. Or if it is blank, you can enter the Quantity for the TRC of the payable time you want to adjust. The quantity values
TRC Type	The system displays the <i>TRC Type</i> for the TRC of the payable time you want to adjust.
Billable Indicator	Select this check box if you want the time to be available to the Mobile Time and Expense feature in PeopleSoft Projects.
Currency	Select a currency code for the time you want to adjust if you require your time reporter’s to report a currency type code for the time being reported and if the TRC Type for the time is an <i>Amount</i> .
Override Rate	Select an override rate for the time you want to adjust. The rate is passed to your payroll system to use in calculating pay. Otherwise, the rate defaults to the rate on the Time Reporting Code or the hourly rate on the time reporter’s job record.

Rate Code	Select a Rate Code to specify the Compensation Rate for the time you want to adjust.
Country	Select the country for the time being adjusted, otherwise the system will use the default for the time reporter.
State	Select the state for the time being adjusted if you want to report a state other than the default associated with the time reporter's Tax Location Code.
Locality	Select the locality for the time being adjusted if you want to report a locality other than the default for the time reporter. The locality should be reported with the associated state. The state and locality combination must be defined for the time reporter on the Maintain Tax Data pages.

Task Reporting Elements



For more information about the following task elements, see Creating Task Templates in this PeopleBook.

Company	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Company for the time being adjusted.
Business Unit	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Business Unit for the time being adjusted.
Location	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Location for the time being adjusted.
Department	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Department for the time being adjusted.
Position	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Position for the time being adjusted.
Product	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Product for the time being adjusted.
Customer	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Customer for the time being adjusted.

Task	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Task for the time being adjusted.
Project/Grant	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Project/Grant for the time being adjusted.
PC Business Unit	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a PC Business Unit for the time being adjusted.
Resource Type	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Resource Type for the time being adjusted.
Resource Category	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Resource Category for the time being adjusted.
Resource Sub Category	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Resource Sub Category for the time being adjusted.
Perf Meas Business Unit	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Perf Meas Business Unit for the time being adjusted.
Activity ID	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Activity ID for the time being adjusted.
Account Code	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Account Code for the time being adjusted.
User Field 1-5	These elements will appear if these task elements are defined on the taskgroup associated to the time reporter. Select a User Field name for the time being adjusted.
Job Code	This element will appear if this task element is defined on the taskgroup associated to the time reporter. Select a Job Code for the time being adjusted.
User ID	The system displays the User ID of the person who adjusted the time, if applicable.
Publish Switch	The system displays the Publish Switch for time that was published to PeopleSoft Projects.

Publish Date

This is the date PeopleSoft Time and Labor published actual costs to PeopleSoft Projects and other financial applications. ‘Publish’ takes place as soon as the system sets the payable time status to **Approved – Not for Payroll**. Time and Labor set the **Publish Date** on the payable time record to show that this time was published in its final form.

Estimated Gross

Enter the payable time estimate for the time being reported when converted to gross pay by payroll. Payroll uses the appropriate rate for the earnings unless, in PeopleSoft Time and Labor, the rate is a positively reported rate that’s passed to payroll as an override. The currency code identifies the currency in which this amount is stated.

This field remains an estimate. The system does not replace it with actual costs received from payroll. We keep the estimate as an historic record of what Time Administration calculated.

For more information about the Calculate Estimated Gross field on the TL Installation page, see PeopleSoft 8 Time and Labor, “Setting Up Your Basic Tables” in this PeopleBook.

Labor Distribution Amount

Enter the adjusted Labor Distribution Amount for the time being adjusted. You will need to manually figure out the amount you want to enter here. The Labor Distribution process takes a lump sum amount from Payroll and divides it across the Time and Labor entries that went into the calculation of the lump sum.

Diluted Labor Distribution Amt

Enter the adjusted Labor Dilution amount for the time being adjusted. The process takes all the records in a day and derives a combined rate based on total cost. This combined rate is applied back to the hours in the day.

Auditing Time

We provide audit pages that you can use to view punch and elapsed time for history purposes. These pages provide a way for you to track what changes have occurred to the originally reported time. On the main Elapsed and Punch Time Audit pages, the system displays reported time that is **current**. It also displays a **History** hyperlink if changes were made to the originally reported time; otherwise the History element is unavailable. The History page enables you to view the originally reported time along with any other changes that happened prior to the reported time that is considered current. The pages, both main and History also include a **More** hyperlink that you can use to view additional information about the reported time for the row. These pages eliminate the need for you to create reports to track changes to your time.

All elements related to time within the PeopleSoft Time and Labor system appear as display only on the pages, even if there is no data to be displayed. The main page displays time that exists in the reported time tables. The History page displays time that exists in the Audit tables, which include all entries and changes that have occurred to the time.

Elapsed Time Page

Usage	Use the Elapsed Time page to view current reported time.
Object Name	TL_AUD_ELPTIME_PNL
Navigation	Administer Workforce, Capture Time and Labor, Use, Elapsed Time Audit
Prerequisites	Time must be reported
Access Requirements	EmplID

Elapsed Time

Martina Griffiths
ID: KC0001

Job Title: Senior Secretary

Start Date: 01/03/2000
End Date: 06/01/2000
Get Rows

Date	Status	History	Time Reporting Code	Quantity	Taskgroup	More...
01/03/2000	Current	History	KUHOL	8.000000	KUTSKGRP3	More...
01/04/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/05/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/06/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/07/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/10/2000	Current	History	KUCT3	8.000000	KUTSKGRP3	More...
01/11/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/11/2000	Current	History	KUCE3	2.000000	KUTSKGRP3	More...
01/12/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/12/2000	Current	History	KUCE3	2.000000	KUTSKGRP3	More...
01/13/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/13/2000	Current	History	KUCE3	2.000000	KUTSKGRP3	More...
01/14/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/17/2000	Current	History	KUCT3	10.000000	KUTSKGRP3	More...
01/18/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...
01/19/2000	Current	History	KUREG	8.000000	KUTSKGRP3	More...

Elapsed Time page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID**, **Job Title**.

Personal Information

Start Date	Enter the Start Date for the time you want to view. The system will populate the fields with the data for all time reported on and in-between the start and end dates.
End Date	Enter the End Date for the time you want to view. The system will populate the fields with the data for all time reported on and in-between the start and end dates.
Get Rows	After you enter the Start and End Dates, click on the Get Rows button. The system will retrieve the data for all the current reported time, along with all time that has been deleted that was reported on and in-between the start and end dates.
Date	The system displays the Date for the time that was reported.
Status	The system displays whether the time is current or was deleted . If the status is current , the system displays either the originally reported time if no changes have occurred, the latest change to the originally reported time or time that has been added since the time was originally reported. If the status is deleted , the system displays the time that was deleted.
History	Click the History hyperlink to see details about the changes that were made to the time. If the time is current and no changes were made to the time, this field is unavailable. If History is available, then changes have occurred to the time, and you can view them by clicking it.
Time Reporting Code	The system displays the Time Reporting Code for the reported time that has a status of either current or deleted.
Quantity	The system displays the Quantity for the Time Reporting Code for the reported time that has a status of current or deleted .
Taskgroup	The system displays the Taskgroup for the reported time that has a status of current or deleted .
More	Click the More button to see details about the current or deleted reported time.

Elapsed Time Audit Page

Usage	Use the Elapsed Time Audit page to view changes made to the reported elapsed time selected.

Object Name	TL_AUDIT_ELP_PNL
Navigation	To access the Elapsed Time Audit page, click the History hyperlink on the Elapsed Time page.

Elapsed Time Audit

Martina Griffiths
ID: KC0001

Job Title: Senior Secretary

Audit Action	Date	Time Reporting Code	Quantity	Taskgroup	More...
A	01/03/2000	KUHOL	8.000000	KUTSKGRP3	More

Elapsed Time Audit page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID**, **Job Title**.

Audit Action	The system displays the Audit Action for the reported time. Valid Values are: A , (Add), C (Change), D (Delete), K (Key Change Old Key), and N (Key Change New Key).
Date	The system displays the date that the reported time was originally reported then changed.
Time Reporting Code	The system displays the Time Reporting Code for the reported time that was originally reported then changed.
Quantity	The system displays the Quantity for the Time Reporting Code that was reported for the time that was originally reported then changed.
Taskgroup	The system displays the Taskgroup for the reported time that was originally reported then changed.
More	Click the More button to see details about the time that was originally reported then changed.

Elapsed Audit Secondary Page

Usage	Use the Elapsed Audit Secondary page to view details about the time reporting elements and task reporting elements reported for the time.
Object Name	TL_AUDIT_ELP_S1
Navigation	To access the Audit Secondary page, click the More hyperlink on the Elapsed Time page.

Elapsed Audit Secondary Page**ID:** KC0001 **Name:** Griffiths,Martina Rae**Rcd#:** 0**Time Reporting Elements**

Time Reporting Code:	KUHOL	☐ Billable Indicator
Taskgroup:	KUTSKGRP3	Badge ID:
Task Profile ID:		Time Collection Device ID:
Currency Code:		TCD Supervisor ID:
Rate Code:		Reported Time Source: SYS
Override Rate:		Rule Element 1:
Override Reason Code:		Rule Element 2:
Country:		Rule Element 3:
State:		Rule Element 4:
Locality:		Rule Element 5:
Comments:		

Elapsed Audit Secondary page (1 of 3)

Task Reporting Elements

Company:
Business Unit:
Location:
Department:
Job Code:
Position Number:
Product:
Customer:
Task:
Account Code:
PC Business Unit:
Perf Meas Business Unit:
Project/Grant:
Activity ID:
Resource Type:
Resource Category:

Elapsed Audit Secondary page (2 of 3)

Resource Sub Category:

User Field 1:

User Field 2:

User Field 3:

User Field 4:

User Field 5:

Location SetID:

Department SetID:

Job Code SetID:

Activity SetID:

Resource SetID:

Sequence number:1

User ID:PS

Elapsed Audit Secondary page (3 of 3)

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **ID, Name, Rcd#.**

Time Reporting Elements

Badge ID	The system displays the Badge ID number for the reported time if you require a Badge number to be used when reporting time.
Task Profile ID	The system displays the Task Profile ID for the reported time. The Elapsed Audit History Sec page displays the Task Profile ID for the originally reported time.
TCD Supervisor ID	The system displays the ID of the Supervisor assigned to the Time Reporter for the reported time.
Time Collection Device ID	The system displays the ID of the Time Collection Device to which the time was reported.
Reported Time Source	The system displays the source of where the reported time was generated, such as Time Administration or Time Validation.
Override Reason Code	The system displays the code for the reason the reported time was overridden.
Rule Element 1-5	The system displays the rule element for the reported time. Time Reporters can override rule elements that are assigned to them on the Create or Maintain TR Data tables.

The rest of the Time Reporting Elements that display on this page are the same that appears on the More Payable Time Information page. For a description of what is displayed, see Adjusting Time, More Payable Time Information.

Task Reporting Elements

Following we describe the Task Reporting Elements that do not display on another page within the PeopleSoft Time and Labor system. We describe the remaining displayed elements under Adjusting Time, More Payable Time Information.

Department SetID	The system displays the Department SetID for the reported time. The system resolves the HR Business Unit SetID to enable you to enter values into your Job Code, Department and Location fields.
Resource SetID	The system displays the Resource SetID for the reported time. The system resolves the PC Business Unit SetID to enable you to enter values into your Project Resource fields.
Activity SetID	The system displays the Activity SetID for the reported time. The system resolves the PC Business Unit SetID to enable you to enter values into your Activity ID fields.
Sequence Number	The system displays a system-generated number to distinguish each row.
Position Number	The system displays the position number for the time reporter.
Job Code Set ID	The system displays the Department SetID for the reported time. The system resolves the HR Business Unit SetID to enable you to enter values into your Job Code, Department and Location fields.
Location SetID	The system displays the Department SetID for the reported time. The system resolves the HR Business Unit SetID to enable you to enter values into your Job Code, Department and Location fields.
Comments	The system displays the comments that were entered for this row of reported time.

The rest of the elements displayed on the page are documented under Adjusting Time, More Payable Time Information.

Elapsed Audit History Sec Page

Usage	Use the Elapsed Audit History Secondary Page to view further history about the time that was originally reported then changed.

Object Name	TL_AUDIT_ELPHIS_S1
Navigation	To access the Audit Secondary page, click on the More hyperlink on the Elapsed Time Audit page.

Elapsed Audit history Sec Page

EmplID: KC0001 Name: Griffiths,Martina Rae Rcd#: 0

Time Reporting Elements

Audit User ID:	PS	Audit Date and Time Stamp:	
Time Reporting Code:	KUHOL	☐ Billable Indicator	
Taskgroup:	KUTSKGRP3	Badge ID:	
Task Profile ID:		Time Collection Device ID:	
Currency Code:		TCD Supervisor ID:	
Comp Rate Code:		Reported Time Source:	SYS
Override Rate:		Rule Element 1:	
Override Reason Code:		Rule Element 2:	
Country:		Rule Element 3:	
State:		Rule Element 4:	
Locality:		Rule Element 5:	
Comments:			

Elapsed Audit History Sec page (1 of 3)

Task Reporting Elements

Company:

Business Unit:

Location Code:

Department:

Job Code:

Position Number:

Product:

Customer:

Task:

Account Code:

PC Business Unit:

Perf Meas Business Unit:

Project/Grant:

Activity ID:

Resource Type:

Resource Category:

Elapsed Audit History Sec page (2 of 3)

Resource Sub Category:	
User Field 1:	
User Field 2:	
User Field 3:	
User Field 4:	
User Field 5:	
Location SetID:	
Department SetID:	
Job Code SetID:	
Activity SetID:	
Resource SetID:	
Sequence number:	1
User ID:	PS

Elapsed Audit History Sec page (3 of 3)

The fields on the Elapsed Audit History Sec Page are the same as the ones on the Elapsed Audit Secondary Page. The only difference is, this page also displays the **Audit User ID**, which is the User ID of the person who entered this row of reported time, and the **Audit Date and Time Stamp**, which is the audit date and time when the time was reported for this row.

See the Elapsed Audit Secondary Page for an explanation of what appears in the rest of the elements.

Punch Time Page

Usage	Use the Punch Time Audit page to view tracked changes that may have occurred to the originally reported time.
Object Name	TL_AUD_PUNTIME_PNL
Navigation	Administer Workforce, Capture Time and Labor, Use, Punch Time Audit
Prerequisites	Time must be reported.
Access Requirements	Enter an employee ID

Punch Time

Charles Reid ID: KC0004

Job Title: Payroll Clerk

Start Date: 01/03/2000 End Date: 06/01/2000 **Get Rows**

Punch Date and Time	Punch Type	Status	History	Time Zone	Taskgroup	More...
01/03/2000 8:00AM	IN	Current		PST		More...
01/03/2000 1:00PM	OUT	Current		PST		More...
01/04/2000 7:00AM	IN	Current		PST		More...
01/04/2000 12:00PM	OUT	Current		PST		More...
01/10/2000 7:00AM	IN	Current		PST		More...
01/10/2000 12:00PM	OUT	Current		PST		More...
01/11/2000 7:00AM	IN	Current		PST		More...
01/11/2000 12:00PM	OUT	Current		PST		More...
01/17/2000 7:00AM	IN	Current		PST		More...
01/17/2000 12:00PM	OUT	Current		PST		More...
01/18/2000 7:00AM	IN	Current		PST		More...
01/18/2000 12:00PM	OUT	Current		PST		More...
01/24/2000 8:00AM	IN	Current		PST		More...
01/24/2000 1:00PM	OUT	Current		PST		More...
01/25/2000 8:00AM	IN	Current	History	PST	KUTSKGRP1	More...

Punch Time page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EMPLID**, **Empl Rcd#**.

Start Date

Enter the **Start Date** for the time that you want to view. The system will populate the fields with the data for all time reported between the start and end dates.

End Date

Enter the **End Date** for the time that you want to view. The system will populate the fields with the data for all time reported on and between the start and end dates.

Get Rows

After you enter the Start and End Dates, click on the **Get Rows** button. The system will retrieve the data for all the reported time, including changes, that were reported on and in-between the start and end dates.

Punch Date and Time

The system displays the date and time the punch was reported.

Punch Type

The system displays the type of punch for the reported time.

Status	The system displays whether the time is current or was deleted. If the status is current , the system displays either the originally reported time, the latest change to the originally reported time, or time that has been added since the time was originally reported. If the status is deleted , the system displays the time that was deleted.
History	Click History to see details about the changes that were made to the time. If the time is current and no changes were made to the time, this field is unavailable. If History is a hyperlink and available, then changes have occurred to the time, and you can view them by clicking on the History hyperlink.
Time Zone	The system displays the Time Zone for the reported time that is considered current.
Taskgroup	The system displays the Taskgroup ID for the reported time that is considered current.
More	Click the More button to see details about the current or deleted reported punch time.

Punch Time Audit Page

Usage	Use the Punch Time Audit page to view the details of the time for the date.
Object Name	TL_AUDIT_PCH_PNL
Navigation	To access the Punch Time Audit page, click the History hyperlink on the Punch Time page.

Punch Time Audit

Charles Reid

ID: KC0004

Job Title: Payroll Clerk

Audit Action	Punch Date and Time	Punch Type	Time Zone	Taskgroup	More...
C	01/25/2000 8:00AM	OUT	PST		More...

Punch Time Audit page

Most of the elements for the Punch Time Audit page are the same as the ones on the Elapsed Time Audit History Page. The only differences are, this page also displays the **Punch Date and Time**, the **Punch Type**, and the **Time Zone**, all of which display the appropriate codes, dates and times for the time that was reported for the row.

See the Elapsed Time Audit Secondary Page for an explanation of what appears in the rest of the elements.

Punch Audit Secondary Page

Usage	Use the Punch Time Audit Secondary page to view details about the reported punch time.
Object Name	TL_AUDIT_PCH_S1
Navigation	To access the Punch Time Audit page, click the More hyperlink on the Weekly Punch Time page.

Punch Audit Secondary Page

EmplID: KC0004 Name: Reid, Charles M Rcd#: 0

Time Reporting Elements

Taskgroup:	KUTSKGRP1	Badge ID:	
Task Profile ID:		Time Collection Device ID:	
Time Zone:	PST	TCD Supervisor ID:	
Override Reason Code:		Reported Time Source:	SYS
Country:		Rule Element 1:	
State:		Rule Element 2:	
Locality:		Rule Element 3:	
		Rule Element 4:	
		Rule Element 5:	

Comments:

Punch Audit Secondary page (1 of 3)

Task Reporting Elements
Company:
Business Unit:
Location Code:
Department:
Job Code:
Position Number:
Product:
Customer:
Task:
Account Code:
PC Business Unit:
Perf Meas Business Unit:
Project/Grant:
Activity ID:
Resource Type:
Resource Category:

Punch Audit Secondary page (2 of 3)

Resource Sub Category:	
User Field 1:	
User Field 2:	
User Field 3:	
User Field 4:	
User Field 5:	
Location SetID:	
Department SetID:	
Job Code SetID:	
Activity SetID:	
Resource SetID:	
User ID:	PS

Punch Audit Secondary page (3 of 3)

The elements for the Punch Audit Secondary page are the same as the ones that appear on the Elapsed Audit Secondary page.

See the Elapsed Audit Secondary Page for an explanation of what displays in these elements.

Punch Audit History Sec Page

Usage	Use the Punch Time Audit History Secondary page to view further history about the time that was originally reported then changed.

Object Name	TL_AUDIT_PCHHIS_S1
Navigation	To access the Punch Time Audit page, click the More hyperlink on the Punch Time Audit page.

Punch Audit history Sec Page

EmplID: KC0004 Name: Reid,Charles M Rcd#: 0

Time Reporting Elements

Audit User ID:	PS	Audit Date and Time Stamp:	06/15/2000 10:23:15.717000AM
Taskgroup:		Badge ID:	
Task Profile ID:		Time Collection Device ID:	
Time Zone:	PST	TCD Supervisor ID:	
Override Reason Code:		Reported Time Source:	SYS
Country:		Rule Element 1:	
State:		Rule Element 2:	
Locality:		Rule Element 3:	
		Rule Element 4:	
		Rule Element 5:	

Comments:

Punch Audit History Sec page (1 of 3)

Task Reporting Elements

Company:

Business Unit:

Location Code:

Department:

Job Code:

Position Number:

Product:

Customer:

Task:

Account Code:

PC Business Unit:

Perf Meas Business Unit:

Project/Grant:

Activity ID:

Resource Type:

Resource Category:

Punch Audit History Sec page (2 of 3)

Resource Sub Category:	
User Field 1:	
User Field 2:	
User Field 3:	
User Field 4:	
User Field 5:	
Location SetID:	
Department SetID:	
Job Code SetID:	
Activity SetID:	
Resource SetID:	
User ID:	PS

Punch Audit History Sec page (3 of 3)

The elements on the Punch Audit History Sec Page are the same as the ones on the Elapsed Time Audit Secondary Page. The only difference is, this page also displays the **Audit User ID**, which is the User ID of the person who entered this row of reported time, and the **Audit Date and Time Stamp**, which is the audit date and time when the time was reported for this row.

See the Elapsed Time Audit Secondary Page for an explanation of what appears in the rest of the elements.

Overriding Rules for a Day

You can choose to override rules for a time reporter for a day using this page. The Override Rules page tells the system to bypass rules processing for the day for the time reporter. Time Administration will send reported time, or scheduled time for an exception reporter that didn't positively report anything, to payable time and will not process any rules on that time.

When Time Administration is initiated, it will extract records from the Time and Labor Intermediate Payable Time table for any days with reported time that have been overridden, into a rules override working table. It then applies rules to all records stored on the Intermediate Payable Time table and updates payable time. As a final step, Time Administration uses the data stored in the rules override working table to replace records found in the final payable time table.



You will need to enter time exactly how you want your time reporter to get paid, including overtime hours, using one of the time reporting pages when you want to override rules for a day.



For more information about Intermediate Payable Time and how Time Administration processes payable time, see *Creating Rules in Time Administration* and *Understanding Batch Processing in Time Administration* in this PeopleBook.

Override Rules – Time Reporter Page

Usage	Use the Override Rules – Time Reporter page to stop Time Administration from processing any rules against the time for the day.
Object Name	TL_RULES_OVR_PAGE
Navigation	Administer Workforce, Capture Time and Labor, Manage, Override Rules for Time Report
Prerequisites	Report Time
Access Requirements	Enter an employee ID.

Override Rules - Time Reporter

EmplID: KC0004 Empl Rcd Nbr: 0

View All First 1 of 1 Last

***Date Under Report**

1 01/05/2000 + -

Override Rules – Time Reporter page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Employee ID (EmplID)**, **Employee Record Number (Empl Rcd Nbr)**.

CHAPTER 16

Integrating with Payroll Applications



This section addresses PeopleSoft Time and Labor functionality. For more information on how your payroll product handles this process, see the documentation for your payroll application.

A primary function of PeopleSoft Time and Labor is to transmit payable time, created by the Time Administration process to a payroll application, such as PeopleSoft Payroll for North America or PeopleSoft Global Payroll. The payroll application can then compensate time reporters for their payable time and—at the end of the pay run—send labor-related costs back to Time and Labor where they can be distributed across payable time and made available to PeopleSoft Projects and other applications.

If you're using PeopleSoft Global Payroll with PeopleSoft Time and Labor, integration offers some additional benefits. These two products share many of the same scheduling pages and records. Schedules you define in one system can be used by the other. You can also make absence data available to Time Administration's rules process.

This section describes how to configure PeopleSoft Time and Labor to integrate with PeopleSoft Payroll for North America and PeopleSoft Global Payroll. It also explains how Time and Labor interacts with each payroll system and how you can extract cost data from your payroll product after a pay run and distribute it across payable time entries.



For more information about payable time, see [Understanding Payable Time](#).

Overview of Payroll Integration

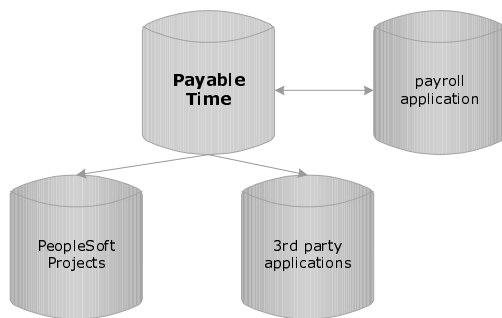
Before you can use your payroll system to pay employees for time reported in PeopleSoft Time and Labor, you must configure your systems to work together. You will map time reporting codes (TRCs) to your payroll system's earnings codes and select settings on various pages within PeopleSoft Time and Labor, your payroll system, and PeopleSoft Human Resources. Configuration requirements vary by payroll system and are described later in this section.

Once the setup is complete, payroll personnel can include payable time, created by the Time Administration process, in pay runs. Depending on how you've configured PeopleSoft Time and Labor, payroll personnel can distribute the resulting costs back to payable time to be used by other products for project costing, estimation, or other business purposes. The relationship

between payable time created in PeopleSoft Time and Labor, your payroll application, and other applications that can use cost data is shown below.



Payable time is available to third-party applications, however PeopleSoft does not deliver a process for publishing to third-party applications.



Relationship of PeopleSoft Time and Labor to applications that use payable time

General Procedure for Running a Payroll with Payable Time

Procedures for including payable time in your pay runs vary by payroll system; however the general steps that apply to both PeopleSoft Payroll for North America and Global Payroll are as follows:

1. In PeopleSoft Time and Labor, a user run the Time Administration process to create payable time for the workgroups that include the time reporters you want to pay.
2. In the Payroll system, a user sets up the calendars and run IDs for the payroll process. In other words, the payroll system defines who is to be paid and for what period of time. This information is used to select employees in the pay group who have been active at any time during the pay period.
3. Payable time entries are selected from PeopleSoft Time and Labor and made available to the payroll system. The first time this occurs, all payable time that meets the selection criteria is made available. After that, only payable time that has been added or changed is selected, including adjustments to the current period and prior periods.
4. The payroll system summarizes the payable time entries. (Summarization consists primarily of totaling reported hours, units, or amounts at the earnings code or task code level. Each payroll system has its own rules for summarizing data.) Pay calculations are run and the payroll cycle is completed.
5. The payroll system sends cost data generated by the pay run back to Time and Labor.
6. The Labor Distribution and Dilution processes are invoked in Time and Labor, if you have selected these features. Labor Distribution attaches the costs calculated by your payroll

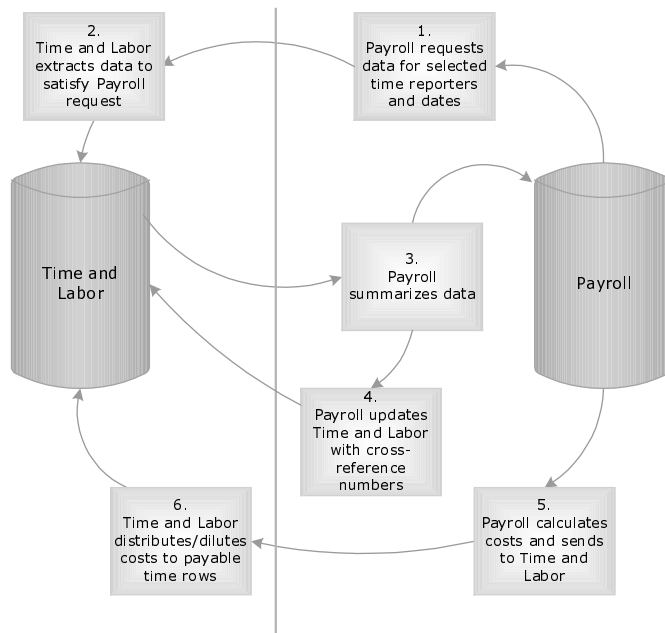
system to the corresponding payable time entries in Time and Labor; Labor Dilution averages the calculated costs and evenly distributes them across the payable time entries.

The payable status associated with each entry of payable time is updated throughout the various stages of processing. You can view payable status on the View Payable Time Summary Page in PeopleSoft eTime Collaborative Applications.



For more information about payable status, see Understanding Payable Time.

The following diagram illustrates the process flow.



Process flow when PeopleSoft Time and Labor is integrated with a payroll application

Labor Distribution and Dilution

Once a pay run is complete, payroll costs associated with time that originated in PeopleSoft Time and Labor can be extracted from the payroll system and distributed across payable time entries. The updated time detail can then be published to other applications, such as PeopleSoft Projects, for additional processing.

The process of allocating costs back to payable time is referred to as Labor Distribution. Labor Distribution is an optional feature of PeopleSoft Time and Labor that you can select on the Payroll System page. You can select one of two options.

- Labor Distribution only.

This option enables you to allocate payroll dollars back to the tasks for which payable time was originally reported, provided you defined the Time Reporting Code (TRC) as eligible for

distribution. If you're not tracking time at the task level, costs are allocated to the TRCs to which time was reported.

- Labor Distribution and Dilution.

If you select this option, the Dilution process is triggered automatically at the end of the Labor Distribution process. The system reallocates labor-distributed costs for a given day, so that payroll costs are evenly distributed over payable time entries for *hourly* TRCs flagged as eligible for dilution. If a time reporter is paid at different rates or—in the case of salaried workers—is not explicitly paid for overtime, PeopleSoft Time and Labor can calculate an average hourly (diluted) amount and apply it evenly across all hours reported for the day.

Example

The following example illustrates the affect of labor distribution with and without dilution.

Assume the following time entries:

Date	Hours	TRC	Project
1 Feb	5	REG	A
1 Feb	4	REG	B
1 Feb	3	REG	C

Now, suppose the Time Administration process applies a rule that converts hours in excess of 8 per day to overtime. The results of the rule are shown below.

Date	Hours	TRC	Project
1 Feb	5	REG	A
1 Feb	3	REG	B
1 Feb	1	OT	B
1 Feb	3	OT	C

When you run the payroll process, it consolidates the entries resulting in 8 hours of regular time and 4 hours of overtime. Regular time is paid a rate of 10 per hour; overtime is paid a rate of 19 per hour. Payroll sends the costs back to Time and Labor, which distributes the costs across the payable time entries as follows:

Date	Hours	Rate	TRC	Project	Cost
1 Feb	5	10	REG	A	50
1 Feb	3	10	REG	B	30
1 Feb	1	19	OT	B	19
1 Feb	3	19	OT	C	57
TOTAL	12				156

As you can see, the cost for project A is lower than the cost for Project C, even though more hours were worked for Project A. This is not very equitable, given that the time reporter could have worked on the projects in any order.

The Labor Dilution process evens things out. It divides the total cost of 156 by 12 (the total number of reported hours) to come up with a rate of 13. It then applies the same rate to all entries, as shown in the following table.

<i>Date</i>	<i>Hours</i>	<i>Rate</i>	<i>TRC</i>	<i>Project</i>	<i>Diluted Cost</i>
1 Feb	5	13	REG	A	65
1 Feb	3	13	REG	B	39
1 Feb	1	13	OT	B	13
1 Feb	3	13	OT	C	39
TOTAL	12				156

Now Project A reflects a diluted cost that's proportionate to the number of hours worked.

Labor Distribution Rules

- Labor distribution allocates costs back to payable time entries according to the level of detail supported by the payroll system. The criteria the payroll system uses to consolidate payable time entries determines the level of detail.
- When all TRCs participating in labor distribution are of the same type (amount, units, or hours), costs are allocated evenly, based on the reported values. When one or more TRCs are defined with an amount type, Labor Distribution allocates the amounts that were originally reported back to TRCs with an amount type, then allocates the remaining costs across TRCs with a type of hours or units.
- When payable time is set to Closed status for any reason (that is, it will not be sent to a payroll system or will not participate in labor distribution), the estimated gross amount (Est_Gross) will populate both the labor distribution amount field (Lbr_Dist_Amt) and the diluted labor distribution amount field (Diluted_Gross). In addition, the currency code (Currency_Cd) that's used to calculate estimated gross will populate the currency code used for the labor distributed and labor diluted amounts (Currency_Cd2).
- Record-only adjustments are not sent to payroll for processing, thus they are not included in the Labor Distribution process. You can manually update the Labor Distribution and Labor Dilution amount through the Adjust Paid Time page.

Integrating with PeopleSoft Payroll for North America

- This section addresses PeopleSoft Time and Labor functionality only. For more information about using PeopleSoft Payroll for North America with Time and Labor see Configuring for use with PeopleSoft Payroll for North America later in this section.)

PeopleSoft Time and Labor integrates seamlessly with PeopleSoft Payroll for North America and fully supports all features of the payroll system, including iterative processing, on- and off-cycle payrolls, final check, online check, and check reversal/adjustments.

Once you configure the two systems to work together, your payroll staff can easily load payable time into the payroll system before each pay run, and extract cost data after a pay run, if desired.

Processing Overview

The steps involved in preparing for and running a payroll when PeopleSoft Time and Labor is integrated with PeopleSoft Payroll for North America are described below.

To prepare for and run the payroll:

1. Run the Time Administration process in Time and Labor to create payable time for the time reporters who are to be paid.
2. Load payable time created by the Time Administration process into PeopleSoft Payroll for North America.
3. Run the payroll process and finalize the pay run.
4. Extract data from Payroll and send to Time and Labor.

The Extract process triggers the Labor Distribution and Labor Dilution processes, if you've enabled these features in Time and Labor.

Step 1 is the only step you perform in Time and Labor. All other interactions are initiated through PeopleSoft Payroll for North America.

We'll describe what happens during each step of the process.

Preparing Time and Labor Data for Payroll for North America

Before a payroll user launches the payroll process, you must run the Time Administration process for the population of time reporters who are to be paid.



PeopleSoft Payroll for North America uses pay groups to define the population of employees to be paid. Before a pay run is initiated, be sure the Time Administration process has been run for all members of the pay groups that are to be paid.



For more information about running the Time Administration process, see [Launching the Time Administration Process in Understanding Batch Processing in Time Administration](#).

Loading Time and Labor Data

You can load payable time into PeopleSoft Payroll for North America by:

- Using the Load Time and Labor Data page in Payroll for North America.
- Running the preliminary Pay Calculation program. This option is available only if you've configured PeopleSoft Human Resources to enable automatic loading. (See Configuring for use with PeopleSoft Payroll for North America later in this section.)
- Requesting a final check or online check.

If your payroll department prepares paysheets several days before launching the preliminary pay run, you may want to use the Load Time and Labor Data page to retrieve payable time at the beginning of the process. Payable time created or changed after this point can then be quickly loaded into the paysheets each time you run the preliminary Pay Calculation process, assuming the automatic load feature is enabled.

The load process consists of several steps: selecting payable time entries in Time and Labor, passing them to payroll, consolidating entries, and updating paysheets or creating new paysheets if none exist. PeopleSoft Time and Labor selects the payable time; Payroll for North America does the rest.

Selecting Payable Time

PeopleSoft Time and Labor retrieves payable time for each employee who meets the criteria defined by the pay run ID and calendars in PeopleSoft Payroll for North America. For each calendar, it selects all payable time, excluding record-only adjustments, up to the pay end date for all time reporters in the pay group associated with the calendar. For off-cycle processes, it pulls only the subset of payable time that pertains to the individual time reporters or earnings codes selected on the calendar.

For time to be loaded into PeopleSoft Payroll for North America, the following criteria must also be met:

- The payable status of the payable time entry must be set to one of the following:

ES Estimated-Ready for Payroll
 AP Approved-Goes to Payroll
 SP Sent to Payroll
 RP Rejected by Payroll
 TP* Taken-Used by Payroll
 PD* Paid-Labor Distributed
 DL* Paid-Labor Diluted
 CL* Closed (only if the Pay System flag is set to NA)

* Entries with a payable status of TP, PD, DL, or CL are selected only if you choose the Refresh Request option when initiating the load process, or if the Payroll Request Number has been reset to 0 because of a payroll unsheet. (Closed entries are first set to Rejected by the Refresh Request and are then reselected.)

Refresh requests should be used only when payable time data has become corrupted or lost. See Refreshing Data later in this section for more information.)

Time with a payable status of NA (Needs Approval) is never selected.



For more information about payable status, see Understanding Payable Time.

- The employee who reported the time has been set up for payroll processing.
- The time reporting code associated with the payable time has been mapped to an active earnings code. See Configuring for use with PeopleSoft Payroll for North America, later in this section.
- The currency used in PeopleSoft Time and Labor matches the currency defined for the pay group in Payroll for North America when the reported quantity is an amount.

How Payroll for North America Updates Selected Payable Time Records

Payroll for North America updates each payable time entry for the selected time reporters as described below.

For payable time entries loaded into Payroll for North America, the system sets:

- Payable status to SP (Sent to Payroll) for payable time entries that have a payable status of ES (Estimated), AP (Approved), or RP (Rejected). If the entry has already been labor distributed or diluted, it retains its current payable status of PD or DL. If the entry currently has a payable status of CL (Closed), but is not subject to Labor Distribution, it retains its current status.
- The TL Pay System flag to *NA Payroll for North America*.
- The Payroll Request Number to the appropriate payroll request. The system-generated request number is important if payroll clerks need to refresh or reload data later.

For payable time entries not accepted by Payroll, PeopleSoft Time and Labor sets the Payable Status to RP (Rejected by Payroll).



You can see the payable status for a selected time reporter's payable time entries on the View Payable Time Details Page.

Consolidating Payable Time and Creating Paysheets

When payable time entries are loaded into PeopleSoft Payroll for North America, they are summarized according to payroll application's consolidation rules. You can use the Pay Group Table – Time and Labor page in Payroll for North America if you want to instruct the payroll system to create separate rows on the paysheets for payable time entries that have the same account code, business unit, department, job code, locality, position number, and/or state.



For more information about the consolidation process, see Preprocessing Time and Labor Interface in the *PeopleSoft Payroll for North America PeopleBook*.



Note. If PeopleSoft Time and Labor passes an override rate to Payroll for North America, and a rate already exists on the earnings code definition, the rate on the earnings code definition will take precedence. If Time and Labor passes an amount, and the earnings code has a flat amount value defined on a flat amount earnings type, the flat amount on the earnings code will take precedence.

PeopleSoft Payroll for North America keeps track of how it consolidates payable time and lets Time and Labor know which entries were combined by passing back a payroll cross-reference (XREF) number for each Time and Labor sequence number. At the same time, the system:

- Updates entries with a payable status of SP to TP (Taken by Payroll); RP (Rejected by Payroll); or CL (Closed) if Labor Distribution is not enabled. When payable status is set to Closed, actual costs can be published to PeopleSoft Financials.
- Sets the Frozen Flag to Yes, and inserts the current date in the Frozen Date field.

After consolidating entries, Payroll for North America automatically creates paysheets—the tables and pages that summarize all payment data. If current paysheets have already been created for any of the time reporters, the payroll process updates the existing paysheets, rather than creating new ones.

Running the Payroll Process

Calculating and Confirming the Pay Run

After paysheets are created it's time to run the payroll. A Payroll user launches the Pay Calculation and the Pay Confirmation processes, as usual—no additional preparations are needed for PeopleSoft Time and Labor data.

Depending on the installation options selected in PeopleSoft Human Resources, any payable time that has not been sent to payroll before may be automatically loaded when the preliminary Pay Calculation process begins. This includes data that has been updated, such as data for employees who have had a job change.

Unsheeting a Pay Run

When a pay run is unsheeted, Payroll for North America changes the payable status of Time and Labor entries from TP (Taken-Used by Payroll) to RP (Rejected by Payroll) and resets the Payroll Request Number to zero. Entries with a payable status of PD or DL retain their payable status, but the Payroll Request Number is set to zero. Resetting the Payroll Request Number enables

Payroll for North America to reselect the time. (Only time that has a Payroll Request Number of zero is selected.)

Extracting Costs after a Pay Run

After you've loaded payable time into Payroll for North America and then run and confirmed the payroll calculation process, you can extract costs from the payroll system into Time and Labor. Payroll extracts cost data that was generated through:

- On-cycle and off-cycle pay runs.
- Check Reversal/Adjustment. (The cost associated a reversal will be zero.)
- Final check.
- Online check.

The Extract process, which is initiated in Payroll for North America, can be run at any time, as long as the pay run has been confirmed. The user selects the pay run ID and indicates whether to extract costs from the on-cycle calendar, off-cycle calendar, or both. Additional selection criteria can be entered for off-cycle runs.

What the Extract Process Does

The Extract process updates the payable time entries in Time and Labor as follows:

- If the payable time is distributed, but not diluted, changes the payable status to PD (Paid – Labor Distributed). If the payable time is distributed and diluted, it changes the status to DL (Paid – Labor Diluted). If the time is neither distributed nor diluted, its status is set to CL (Closed).
- Provides the cross-reference (XREF) numbers that were generated during the consolidation process, the calculated costs, along with percentages that represent how payroll consolidated the payable time rows.

The percentage is used when the consolidation process is not clean, for example, when a payable time entry is split into multiple payroll entries, then one of the payroll entries is combined with other data. To illustrate, say 75 percent of a time reporter's hour are subject to New York state tax and 25 percent of the hours are subject to Connecticut state tax. In this case, the consolidation process would create two pay earnings rows for the individual—one for each state. The Extract process would return the percentages along with the resulting costs, so Time and Labor knows how to distribute the costs during the Labor Distribution process.

- Triggers the Labor Distribution and Labor Dilution processes in Time and Labor, if applicable.
- Sets the Publish Date and Publish Switch.

Distributing and Diluting Costs

Costs are always distributed across payable time for the current period, as well as across prior period adjustments and advance payments. You can view distributed and diluted costs on the Payable Time Detail Page in PeopleSoft eTime Collaborative Applications

If the pay calendar is on-cycle, then on-cycle earnings can only be distributed once; off-cycle earnings can be distributed multiple times. If the Pay Calendar is off-cycle, then its off-cycle earnings can only be distributed once. The system overlays existing labor distribution amounts with new amounts. This iterative processing makes it possible for you to redistribute earnings after modifying or adjusting pay-related information. Subsequent runs create offsets for existing paid time entries.

If PeopleSoft Projects is installed, “actual” payable time entries with a payable status of Closed, Paid, or Diluted are published automatically to Projects after running the extract job.



For more information about integration with PeopleSoft Projects, see Integrating with PeopleSoft Financials.

Adjusting Payable Time

Normal Adjustments

Normal adjustments to payable time are changes or additions you make to payable time using any of the time reporting pages. If you make normal adjustments after loading payable time into Payroll for North America, be sure to run the Time Administration process again so that the changes you’ve made will be sent to Payroll during the next load process.

If you enter an adjustment after the Frozen Flag is set (that is, once the payable status is set to Approved, Closed, or Sent to Payroll), and the Time Administration process finds an existing entry that has the same time reporting code and task information as your adjusting entry, it creates a new row of payable time, along with a row that offsets the original entry. Both the new and offsetting rows are sent to Payroll when you next load payable time.

Record-only Adjustments

Record-only adjustments entered on the Record Only Adjustment Page are not passed to Payroll for North America; however, they can affect the results of the extract (Labor Distribution) process and the costs that are published to PeopleSoft Projects.

- If you run the Labor Distribution process, make a record adjustment to a payable time record that’s already been distributed, and then re-run Labor Distribution, no cost will be distributed for the adjusted record. An error message will display the sequence number of the payable time entry that will not be redistributed.
- Also, If you make a record only adjustment to an entry that was previously sent to PeopleSoft Payroll for North America, the Labor Distribution Amount and Diluted Labor Distribution Amount will be copied to both the offset row and the new row that’s created. You can alter the values for Labor Distribution and Labor Dilution on the new row, if needed. The amounts

associated with the new row are the amounts that will be published to Projects.

- If you insert a new row on the Record Only Adjustment Page (rather than correct an existing row), you can enter values in both the Labor Distribution Amount and Diluted Labor Distribution Amount fields. If you do not enter a value in the Diluted Labor Distribution Amount field, a zero amount will be published to PeopleSoft Projects as the actual Diluted Labor Distribution Amount when the payable status changes to Closed.



For more information about record only adjustments, see *Adjusting Time in the Managing Time* section. For more information about integration with PeopleSoft Projects, see *Integrating with PeopleSoft Financials*.

Refreshing Data

A Refresh Request option in PeopleSoft Payroll for North America enables users to reselect all payable time that was passed to payroll during the original load process. This includes current data, prior period adjustments, and any new payable time entries where the payable status is set to Estimated, Closed, Sent to Payroll, or Rejected by Payroll. This feature enables a user to recapture lost data, and should be used only as a recovery measure.



Warning. Refresh requests have a significant impact on system performance and should be used only when time has been corrupted or lost and you need to reload all time associated with a particular Payroll Request Number.



For more information about the refresh feature, see *Administering Interfaces in the Payroll for North America PeopleBook*.

Correcting Errors Generated During the Load and Extract Processes

Errors that Can Occur During the Load Process

Payroll personnel are advised to review the paysheets and check the Message Log for error messages created during processing. During the Paysheet Update process, payable time can trigger the processing errors listed below. In all cases, Payroll will change the payable time status to Rejected. Correct the error, run the Time Administration process again, if necessary, and advise the payroll clerk to rerun the paysheet update process.

- Invalid Mapping of TRC to NA Earnings Code.

Action: correct the mapping on the TRC page. It's possible the earnings code was inactivated after it was mapped to the TRC.

- Invalid Currency of TRC for the NA Pay Group.

Action: Correct the currency on the TRC page. PeopleSoft Time and Labor does not perform any currency conversion.



Depending on the installation options selected in PeopleSoft Human Resources, payroll users may be able to modify paysheet data that originated in PeopleSoft Time and Labor when producing a final check, online check, or doing reversal adjustments. However, because changes made on the payroll pages will not be reflected in Time and Labor, we recommend that you make all corrections in Time and Labor.

Errors that Can Occur During the Extract Process

- Multiple currencies cannot be distributed.

Action: Depending on the source of the error, adjust the currency for the reported time in Time and Labor or change the currency for the entry in Payroll for North America.

Configuring for Use with PeopleSoft Payroll for North America

Before you can use PeopleSoft Time and Labor with Payroll for North America, you must configure both systems appropriately. You must also select various options in PeopleSoft Human Resources. This section describes the settings you must select in Time and Labor and Human Resources.



For more information about configuring PeopleSoft Payroll for North America to integrate with PeopleSoft Time and Labor, see Preprocessing Time and Labor Interface in the *Payroll for North America PeopleBook*.

To Configure PeopleSoft Time and Labor for Integration with Payroll for North America:

1. On the Payroll System page, select the distribution features you wish to use for PeopleSoft Payroll for North America.

By default, Labor Distribution is selected and Labor Dilution is not. The Labor Distribution option enables users to extract cost data from Payroll for North America after a pay run and associate it with payable time entries in PeopleSoft Time and Labor. The Dilution feature is an extension of the distribution process. It enables you to distribute payroll costs evenly across payable time.

2. On the TRC 1 page, map each time reporting code to the appropriate earnings code defined in PeopleSoft Payroll for North America.

If you want the TRC to be eligible for Labor Distribution, select the Distribute Costs option. If you want an hourly TRC to be eligible for labor dilution, select the Used in Labor Dilution

option.

If a TRC is set up for Labor Distribution or Dilution, but Labor Distribution or Labor Dilution is not enabled on the Payroll System page, distribution and dilution will not occur.



We recommend that you use the Sync (synchronize) feature on the TRC Setup 1 page to synchronize time reporting codes with the earnings codes defined in Payroll for North America. See Synchronizing TRCs With NA Earnings Codes.

3. On the Create Time Reporter Data page or the Maintain Time Reporter Data Page, select the Send Time to Payroll option for each employee.

PeopleSoft Payroll for North America does not create paysheets for non-employees.

To Configure PeopleSoft Human Resources for PeopleSoft Payroll for North America Integration:

1. For each employee, ensure the Payroll System field on the Payroll page is set to *North American Payroll*.
2. Set the Employee Type field on the Payroll page to E or H.

If the Employee Type field on the Job Data - Payroll Page is set to S (salaried), any hours that are mapped to the default REG earnings code will not be loaded to paysheets. However, costs will be labor-distributed across these hours if the Distribute Costs option is selected for the TRC. We recommend that you select E (exception hourly) or H (hourly). This will enable updated costs for prior period adjustments to be sent to payroll and on to your general ledger application. If you set up employees with S, Time and Labor will populate the labor distribution amount and the diluted gross amount with an estimated gross for these entries. These entries will be available as actual costs to publish to PeopleSoft Projects, but will not flow through Payroll for North America to your General Ledger application.

3. On the Product Specific page in the Installation Table component, select the T&L/NA Payroll Paysheet options you wish to use.

Paysheets are the pages and tables that pull together all current payroll information—earnings, deductions, hours, taxes, and other accounting data—for the employees and pay period you’ve specified. We recommend that you:

- Select the Refresh on Job Change option and Load in Preliminary Calc options.

These options enable the automatic loading of payable time into PeopleSoft Payroll for North America. If you select Refresh on Job Change and the Job Pay flag on the paysheet is set to Yes, a job change (such as a change in department, paygroup, or employee status) will cause payable time to be reloaded into the payroll system when the paysheet is rebuilt.

If you select the Load in Preliminary Calc option, PeopleSoft Payroll for North America

will automatically load PeopleSoft Time and Labor data each time a user initiates the preliminary Pay Calculation process. It will only load payable time not sent to payroll before.

- Do not select the Change Final Check, Change Online Check, or Change Reversal Adjustments options.

These options let you control whether users can make paysheet changes to data retrieved from PeopleSoft Time and Labor. Any changes made directly to the paysheets will not be transmitted back to PeopleSoft Time and Labor.



For more information about the HRMS Installation Page, see Setting Up Implementation Defaults.

Integrating with PeopleSoft Global Payroll

PeopleSoft Time and Labor is designed to fully integrate with Global Payroll. When you use these two products together you can:

- Retrieve absence data from Global Payroll so that it can be used as criteria within the rules processed by Time Administration.
- Make payable time available to Global Payroll's pay runs.
- Receive cost data from Global Payroll after a pay run.
- Share employee schedules.



When using PeopleSoft Global Payroll with Time and Labor, enter all absences in Global Payroll—not in Time and Labor.

Processing Overview

The steps involved in preparing for and running a payroll when PeopleSoft Time and Labor is integrated with Global Payroll are listed below.

To prepare for and run the payroll:

1. Retrieve absence events and scheduling changes from PeopleSoft Global Payroll.
2. Prepare the time and labor data by running the Time Administration process for the time reporters whom are to be paid.
3. Run the payroll process. This automatically loads payable time from PeopleSoft Time and

Labor.

4. Finalized the pay run.
5. Update payable time in Time and Labor with costs calculated by Global Payroll.
6. Perform labor dilution, if applicable.

Steps 1 and 2 are the only ones you perform in Time and Labor. All other interactions are initiated through Global Payroll.

We'll describe what happens during each step of the process later in this section.

About PeopleSoft Global Payroll

In PeopleSoft Global Payroll, *elements* are used to identify each type of earnings, deduction, and absence a time reporter can have. An element represents the set of rules that are applied during the payroll process and are somewhat similar to time reporting codes.

To integrate PeopleSoft Time and Labor with Global Payroll you must map TRCs to earnings, deduction, and absence take elements. If you're using task reporting, you may also need to map certain task codes to *variable* or *system* elements defined in Global Payroll.

When a time reporter is absent, you record the absence through Absence Entry page in Global Payroll. This creates a row of data in the GP_ABS_EVT_WRK table, which gets loaded into Time and Labor and run through the Submit Time process when you use the GP Absence page in Time and Labor. After the Submit Time process, the data automatically runs through the Time Administration batch process, which can refer to the absence entries as criteria for Time and Labor rules.

For example, you may have an overtime rule that states that payees are not eligible for overtime if they are absent within two days of the overtime period. To correctly apply this rule, PeopleSoft Time and Labor must be aware of all absences reported in Global Payroll.



Although Time and Labor can use absences reported in Global Payroll as criteria for rules, it never alters the reported absence data in Global Payroll. When Global Payroll pays the absence, it can return the cost to Time and Labor, where it is associated with the correct number of hours stored in Time and Labor. You can view, but not edit, absences reported through Global Payroll using the Weekly Elapsed Time Page.

After the Time Administration process has run, a payroll user can launch the pay run. PeopleSoft Global Payroll automatically retrieves the appropriate set of payable time from PeopleSoft Time and Labor at the beginning of the process. The first time the payroll process runs, Global Payroll processes all employees identified in the current calendars. During subsequent runs, Global Payroll processes only those payees in error or with changes.

After the payroll is finalized, a payroll user launches an Update process that updates the status of payable time records in PeopleSoft Time and Labor. The update process also invokes Time and Labor's distribution and dilution processes, if these features are enabled.



If you use the validation set delivered with Time and Labor, absences entered before a time reporter's hire date will create an exception during the TR Status validation phase of the Time Administration process.

Planning Considerations when Integrating with PeopleSoft Global Payroll

While PeopleSoft Global Payroll and PeopleSoft Time and Labor are designed to integrate seamlessly, both are rules-based systems and, as such, are capable of executing some of the same types of rules. Before integrating the two products you need to think carefully about which rules you want each system to apply. In general, you should define all rules that calculate payable time, including rules for overtime, shift differentials, and other special situations in Time and Labor. Create rules that calculate actual pay in Global Payroll.

You will also want to decide on a strategy for mapping time reporting codes to earnings elements. For example, in some cases you may want to map a TRC to an earnings element that does not accumulate to gross pay. This allows you to use a separate rule to calculate the costs associated with a TRC that do not contribute to gross pay—such as an employer-paid health insurance premium. You might use the same approach for salaried employees, where the hours reported by PeopleSoft Time and Labor are not used in the payroll calculation itself, but are used for costing.

To summarize, you would:

- Define one earnings element that accumulates to gross. This is the earnings element the payroll process will use to calculate a payee's pay slip. Do not map this element to a TRC.
- Define a second earnings element that does not contribute to gross pay. This earnings element is used for costing purposes only and, in addition to the payee's salary, can include overhead costs, or any costs you wish to add to it. You map this element to a TRC so that accurate cost data can be sent back to PeopleSoft Time and Labor and made available to cost accounting, planning, or budgeting applications.

Retrieving Absence Data from PeopleSoft Global Payroll

Before running the Time Administration process, use the GP Absence Page to invoke a batch process that causes Global Payroll to send absence data to PeopleSoft Time and Labor. For each absence, Global Payroll sends the code for the absence take element, the beginning and end dates of the absence and, when applicable, partial hours for absences that are less than a full day. It also triggers the Schedule Resolution process, which looks at any full-day absences (that is, days for which no partial hours or half-days were reported), and determines the number of hours the time reporter was absent based on his default schedule in PeopleSoft Global Payroll.

For example, assume a time reporter is scheduled to work eight hours a day, Monday through Friday. An absence event is entered in Global Payroll for Monday, August 14 through Friday, August 18. A partial absence of 4 hours is reported for Monday and Friday. No hours are entered for the other absent days.

Monday	Tuesday	Wednesday	Thursday	Friday
4	Hours not reported	Hours not reported	Hours not reported	4

In this case, Global Payroll sends 4 hours for Monday and 4 hours for Friday. It also invokes the Schedule Resolution process, which looks at the time reporter's schedule in Global Payroll to determine that she was absent 8 hours on Tuesday, Wednesday, and Thursday.

After Time and Labor retrieves the absence information passed from PeopleSoft Global Payroll, it does the following:

- Creates a row in the Rules Override (TL_RULES_OVRD) table for each date and Employee ID combination it receives. This prevents rules from being processed for the time reporter for the dates indicated in the table.
- Launches the Submit process, which converts the absence data to reported time.
- Invokes the Time Administration process, which converts the reported time to payable time.

Absence data cannot be altered in Time and Labor, either by rules processing or by users. You can view absences on the Weekly Elapsed Time page, but cannot edit or replace absence data.



For more information about work schedules, see *Sharing Work Schedules with PeopleSoft Global Payroll*.

You can run the batch process as often as necessary. Each time it runs, it loads only absence data that has been added, changed, or deleted since the last run.



Absence data that is sent to Time and Labor is not used to compensate payees for absences. PeopleSoft Global Payroll calculates payee compensation for absences and, when the labor distribution feature is used, sends the resulting amounts back to Time and Labor after a pay run is finalized.

GP Absence Page

Usage	Use the GP Absence Run Control page to initiate a batch process that retrieves absence data from PeopleSoft Global Payroll.
Object Name	TL_RCTRL_AGG
Navigation	Administer Workforce, Capture Time and Labor, Process, Global Payroll Absence
Prerequisites	None.
Access Requirements	Enter the run control ID without spaces. If creating a new run control ID, you can enter up to 30 alphanumeric characters.

GP Absence page (Global Payroll Absence page)

Run Control ID	The run control ID you entered to access this page appears in this field.
Session Number	This field displays the session number the system automatically assigns to the batch process.
Run	Click Run to run this request. Process Scheduler runs the TLAGGUPDATE process at user-defined intervals.
	For more information about Process Scheduler, see PeopleSoft Payroll PeopleBooks in your <i>PeopleTools PeopleBook</i> .

Preparing Time and Labor Data for PeopleSoft Global Payroll

Before a payroll user launches the pay run, run the Time Administration process for the population of time reporters who are to be paid.



PeopleSoft Global Payroll uses pay groups to define the population of employees to be paid, while the Time Administration process uses work groups to generate payable time. Be sure to run the Time Administration process for all work groups that include the time reporters in the pay groups that will be selected for payment.

Loading Time and Labor Data

Payroll personnel initiate the loading of payable time into PeopleSoft Global Payroll.

When a user launches the Identify phase of the payroll process, it identifies the time reporters who have payable time during the time period defined by pay calendar.

When a user launches the Calculate phase of the payroll process, PeopleSoft Global Payroll automatically selects the payable time entries; bundles them, and inserts the bundled entries into Global Payroll's positive input tables.

How PeopleSoft Global Payroll Selects Payable Time and Updates Payable Status

PeopleSoft Global Payroll pulls only the subset of payable time that falls within the time period specified by the calendar. It does not include record-only adjustments. The following criteria must also be met:

- For the current period, the payable status of the payable time entry can be:

ES Estimated - Ready for Payroll
 AP Approved - Goes to Payroll
 SP Sent to Payroll
 RP Rejected by Payroll

- For retro periods entries, any payable status *except*:
 NA (Needs Approval)
 CL (Closed) when the Pay System field is set to GP



For more information about payable status, see Payable Status and Frozen Flags.

- The employee has been set up for payroll processing and the time reporting code (TRC) associated with the payable time has been mapped to an earnings or deduction element. (See Configuring for use with PeopleSoft Payroll for North America earlier in this section.)
- The TRC is mapped to the calendar's run type (on Global Payroll's Run Type page.)

How Global Payroll Updates Selected Payable Time Records

Global Payroll also updates each payable time entry as follows:

- For payable time entries loaded into Payroll:
 - Set the payable status to SP (Sent to Payroll), unless it already reads PD (Paid-Labor Distributed) or DL (Paid-Labor Diluted).
 - Set the TL pay system flag to GP Global Payroll.
- For payable time entries not accepted by Payroll:
 - Sets the payable status to Rejected by Payroll. The Time Administration program refers to the payable status to determine when to create offsets for adjustments to payable time. Offsets are created for all payable statuses except ES (Estimated) and NA (Needs Approval).
 - Sets the Frozen flag to Yes.

Actual costs associated with payable time can be published to PeopleSoft Financials only after the Frozen flag is set.

- Set the Frozen Date and Publish Date to the system date.



The View Payable Time Details Page displays the payable status, pay system flag and freeze flag for a selected time reporter's payable time entries.

Bundling Payable Time

PeopleSoft Global Payroll bundles similar instances of payable time for efficient processing. It keeps track of how it bundles payable time and lets PeopleSoft Time and Labor know which entries were combined by passing back a set of sequence and cross-reference numbers for each time entry at the end of the payroll process. This information is important to the distribution process.

When a Pay Run is Cancelled

If a pay run is canceled, PeopleSoft Global Payroll deletes the payable data loaded from PeopleSoft Time and Labor and updates the payable status for each payable time entry to *RP – Rejected by Payroll*, unless the following are true:

- Payable status is PD (Paid-Labor Distributed), DL (Paid-Labor Diluted), or TP (Taken-Used by Payroll).
- The payable time has also been sent to another payroll system. Global Payroll checks the Pay System flag to see if the entry was sent to another system.

Retroactive Processing

During a retroactive pay run, Global Payroll always loads payable time from Time and Labor back into its generated positive input table. Payable time that was adjusted in Time and Labor will have two rows of data: one row that reverses or offsets the old value and one row that contains the new value. Global Payroll only needs the new value, which it uses to determine the variance.

Correcting Errors Generated by Payable Time

After a preliminary pay run is complete, we recommend that you review the Payable Status Report for payable time entries that were rejected by PeopleSoft Global Payroll. Errors that are most likely to occur result from the incorrect mapping of time reporting codes (TRCs) to Global Payroll earnings and deduction elements. Because Global Payroll rejects incorrectly mapped entries during the calculate phase of processing, you will only see the rejected items on the Payable Status report—you will not see them on the payroll inquiry pages.

Use the TRC 1 Page to correct mapping errors, run the Time Administration process again, and launch the pay run again.

Global Payroll users are advised to correct any other discrepancies caused by Time and Labor data in the PeopleSoft Time and Labor system, then run the payroll process again.

Currency Differences

PeopleSoft Global Payroll converts the TRC currency into the currency of the country being processed and returns cost data in the Global Payroll processing currency. During the distribution process, the currency code for the Global Payroll processing currency populates the CURRENCY_CD2 field in the payable time record (TL_PAYABLE_TIME) so that you can identify the currency in which the time was paid.

Updating Payable Time after a Pay Run

After a pay run is finalized in PeopleSoft Global Payroll, a Global Payroll user initiates a batch process that updates the payable time entries in Time and Labor. The actions the batch process perform depend on whether the Labor Distribution and Labor Dilution features are enabled in Time and Labor.

Labor Distribution and Labor Dilution Not Enabled

During the batch process, Global Payroll does the following:

- Changes the payable status to CL (Closed) for each entry coded SP (Sent to Payroll) that was successfully processed.
- Sets the Pay System flag to GP.
- Populates the Labor Distribution Amount field and the Diluted Labor Distribution Amount field with the estimated gross.

Labor Distribution and Labor Dilution Enabled

For each entry with a payable status of SP that was retrieved but not processed, the batch process:

- Changes the payable status to RP (Rejected by Payroll), unless the record was previously sent to another payroll system. (Global Payroll will not process a payable time entry when a user manually enters positive input for the same earnings or deduction element. Manually entered positive input always takes precedence.)

For each entry with a payable status of SP (Sent to Payroll) that was successfully processed, the batch process:

- Changes the payable status to TP (Taken-Used by Payroll)
- Sets the Pay System flag to GP.
- Sets the Frozen flag to Yes and the Frozen Date to the current date.

Global Payroll also sends the cost data associated with payable time entries to Time and Labor. It also returns the original Time and Labor sequence number for each payable time entry along with the corresponding cross-reference numbers Global Payroll generated during the bundling process. The cross-reference numbers let Time and Labor know which entries were bundled, making it possible to link the costs calculated for earnings and deduction back to the daily detail. At the end of the batch process, Global Payroll invokes the Labor Distribution process and the Labor Dilution process, if applicable.



For more information about labor distribution and dilution, see the Payroll System Page.

Sharing Work Schedules with PeopleSoft Global Payroll

PeopleSoft Time and Labor and Global Payroll use many of the same pages and records for schedule setup and assignment, though in some cases, the names of these pages vary slightly. If you're using both applications, you need to create and assign schedules only once. Be aware, however, that the information displayed on the scheduling pages may vary somewhat, depending on which application you're using to access them:

- When you access the Assign Schedule page through PeopleSoft Time and Labor, you will not see the alternate work schedule fields that appear when you access the page through PeopleSoft Global Payroll.
- When you access the Shift page through PeopleSoft Time and Labor, you can view but not update data you entered in the four user-defined Sch Cfg (schedule configuration) fields in PeopleSoft Global Payroll.
- The payees you can access through the Assign Schedule page or Override Scheduled Workday Page may vary depending on whether the page is opened through PeopleSoft Global Payroll or PeopleSoft Time and Labor. The security options set up for each system determine which population of payees a user can work with.
- The schedule that displays when accessing the Assign Schedule page or Workday Override page in PeopleSoft Time and Labor may differ from the schedule that appears when accessing the same pages through PeopleSoft Global Payroll. In Time and Labor, a payee's default schedule is based on work group; in PeopleSoft Global Payroll, the default schedule is based on pay group. The page views will differ when a payee is set up to use the default schedule, and the pay group and work group has different default schedules.



For more information about schedules, see Defining Schedules.

Configuring for Use with PeopleSoft Global Payroll

This section describes how to configure PeopleSoft Time and Labor to interface with PeopleSoft Global Payroll. It also describes an additional setup step that's required within PeopleSoft Human Resources.



For more information about configuring PeopleSoft Global Payroll to integrate with PeopleSoft Time and Labor see Working with Interfaces in the *PeopleSoft Global Payroll PeopleBook*.

To Set Up PeopleSoft Time and Labor:

1. Map the Time Reporting Code (TRC) for each type of payable time you want to send to PeopleSoft Global Payroll to the appropriate earnings, deduction, or absence take element defined in Global Payroll.

Use the TRC 1 Page to map TRCs to elements. (The Send to Payroll option on the TRC Setup page is selected automatically when you map a TRC to an element.)

2. Select the desired distribution options for PeopleSoft Global Payroll on the Payroll System page.

By default, Labor Distribution is selected and Labor Dilution is not. The Labor Distribution option enables Global Payroll to send costs generated by a pay run back to PeopleSoft Time and Labor, so that PeopleSoft Time and Labor can distribute the costs across the original payable time entries. The dilution feature is an extension of the distribution process. It enables Time and Labor to evenly distribute payroll costs across payable time.

3. On the Create Time Reporter Data page or the Maintain Time Reporter Data Page select the Send Time to Payroll option for each time reporter.

To Set Up Human Resources:

1. For each time reporter, ensure the Payroll System field on the Payroll page is set to PeopleSoft Global Payroll.
2. Do the same for nonemployees if you want to send their payable time to the payroll system as well.

CHAPTER 17

Integrating with PeopleSoft Financials

PeopleSoft Time and Labor integrates with PeopleSoft financial applications to provide a comprehensive approach to time tracking and project costing. You can configure Time and Labor to do the following:

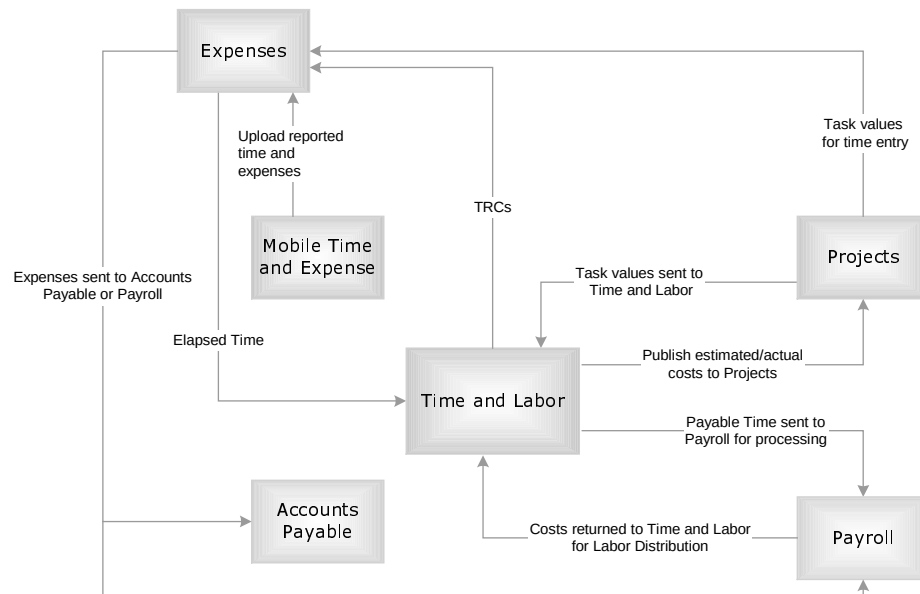
- Integrate with PeopleSoft Projects so you can accurately track the time and labor-related costs of your projects.
- Use Commitment Accounting functionality with task reporting to track labor costs at the ChartField level.
- Integrate with PeopleSoft Mobile Time and Expense through PeopleSoft Expenses so that time reporters can enter time remotely.
- Enable time reporters to report time to the business units and activities defined in PeopleSoft Enterprise Performance Management (EPM).

This section describes how to integrate Time and Labor with PeopleSoft Projects, how to use Commitment Accounting functionality with task reporting, how to report time to business units and activities defined in EPM, and how to enable traveling professionals to report time through PS Mobile Time and Expense.

Before reading this section, you should be familiar with the concept of task reporting in Time and Labor. If you have not yet done so, we recommend that you read *Defining Task Reporting Requirements*.

Integration Overview

The following illustration shows how you might integrate PeopleSoft Time and Labor with other PeopleSoft applications to provide an enterprise-wide solution to time collection, project costing, and compensation.



Integrating PeopleSoft Time and Labor with PeopleSoft Financials applications

This section focuses on integration with PeopleSoft Projects and with Mobile Time and Expense through its interface with PeopleSoft Expenses.

Understanding the Integration Points

Integration between PeopleSoft Time and Labor and PeopleSoft Financials is accomplished through a PeopleSoft Application Messaging technology called Publish and Subscribe.

The Enterprise Integration Points

Following are the enterprise integration points (EIPs) used to integrate with PeopleSoft Financials. The first two EIPs are used with PeopleSoft Projects; the last EIP is used when interfacing with PeopleSoft Mobile Time and Expense through PeopleSoft Expenses.

EIPs

Time and Labor Actual Time

Time and Labor Estimated Time

Time and Labor TRC Information



For more information about PeopleSoft's Publish and Subscribe technology, see your PeopleTools Peoplebook. For more information about the publish and subscribe messages used to integrate with PeopleSoft Projects and PeopleSoft Expenses see Using the EIP Catalog.



Integration with PeopleSoft Financials involves the use of additional EIPs that are controlled by the Financials applications. Please see the PeopleSoft Projects and PeopleSoft Expenses PeopleBooks for additional information.

PeopleSoft Projects Integration



For more information on how PeopleSoft Projects integrates with Time and Labor, see Gathering Time and Labor Costs in your PeopleSoft 8 Projects PeopleBook.

PeopleSoft Projects acts as a central repository for all project data. It enables your organization to capture project costs, keep projects within budget, issue bills for projects, and assess project profitability. When you use Time and Labor's task reporting functionality and integrate Time and Labor with Projects, you can do the following:

- Track time for the projects, activities, business units, resource types, resource categories, and resource subcategories defined in PeopleSoft Projects. You accomplish this by including project-related task entities in your task templates and task profiles.
- Publish, or send, estimated project-related costs to PeopleSoft Projects. This feature can be especially helpful when your organization bills projects off-cycle from the payroll process.
- Publish actual project-related costs to PeopleSoft Projects when a payroll cycle is complete. To use this feature, you must run your payroll through a payroll system that integrates with PeopleSoft Time and Labor, such as PeopleSoft Payroll for North America.

Optional Features

In addition to the above, you can use the following optional features to:

- Restrict time entry so that time reporters can only report time to projects on which they are team members.
- Create a rule that causes the Time Administration process to generate an exception when it processes time reported to closed projects.
- Use the commitment accounting functionality to track time and cost data by ChartField.



For more information about using the commitment accounting functionality, see Commitment Accounting.

What Data is Published to PeopleSoft Projects

When PeopleSoft Time and Labor publishes data to PeopleSoft Projects, it sends the fields in the payable time record as well as the following data:

- All related ChartFields if an account code defined for commitment accounting is reported.
- The TRC type (hours, units, or amount) and unit of measure related to the TRC.
- The General Ledger business unit that is associated with the reported or default Human Resources business unit. PeopleSoft Financials can use the business unit for currency conversion.
- The jobcode of the time reporter. PeopleSoft Projects can use the jobcode within the rate templates used for billing.
- The Send Time to Payroll value (TL_TIME_TO_PAY). Send Time to Payroll is populated with "N" if the payable time is for contractors; it is populated with "Y" if the time is sent to a payroll system.



For more information about the fields in the payable time record (TL_PAYABLE_TIME), see Payable Time Fields.

Setting Up Time and Labor for Use with PeopleSoft Projects



For more information about setting up PeopleSoft Projects to work with PeopleSoft Time and Labor see the PeopleSoft 8 Projects PeopleBook.

To integrate PeopleSoft Time and Labor with PeopleSoft Projects, you need to do the following:

- Select the appropriate installation options in PeopleSoft Time and Labor.
- Retrieve units of measure from PeopleSoft Projects.
- Ensure that you have set up as a time reporter in PeopleSoft Time and Labor each person who reports time to projects.
- Set up task templates and task profiles that include project-related task entities.
- Populate the task entity prompt tables with values defined in PeopleSoft Projects.

Instructions for completing each set-up step follow. You initiate some of these steps in PeopleSoft Projects, and they require coordination with those who administer your Projects application. We recommend that you discuss the set-up process with the Projects administrators before beginning.

Selecting Installation Options in PeopleSoft Time and Labor

On the TL Installation page, select the Interface with PS/ Projects check box. When you select this check box, the system automatically selects the Calculate Estimated Gross check box to

indicate that the system will calculate the estimated costs associated with payable time when you run the Time Administration process.



For more information about how estimated costs are calculated, see Calculate Estimated Gross in the Understanding Batch Processing in Time and Labor section.

Retrieving Units of Measure from PeopleSoft Projects

When you define time reporting codes (TRCs) in PeopleSoft Time and Labor, you select the unit of measure appropriate to each TRC. When Time and Labor is integrated with PeopleSoft Projects, the valid units of measure come directly from Projects. You can view but not change these values through Time and Labor.

Before you begin to define time reporting codes, ensure that the units of measure defined in PeopleSoft Projects have been published to PeopleSoft Time and Labor. This process is initiated in Projects using a full publish.

Subsequent changes made to the units of measure are published to PeopleSoft Time and Labor automatically (through an incremental publish) as they occur.

Enrolling Time Reporters in PeopleSoft Time and Labor

In Time and Labor, enroll as a time reporter each person who reports time to PeopleSoft Projects.



For more information about enrolling time reporters, in PeopleSoft Time and Labor, see Setting Up Time Reporters.

Setting Up Task Templates and Task Profiles for Project Tracking

Integration with PeopleSoft Projects affects the options that are available to you when creating task templates and task profiles for time reporters. This, in turn, affects the types of task data time reporters provide when entering time.

You can select up to six additional, project-specific, task elements on the task reporting templates when you use PeopleSoft Projects. A brief explanation of the dependencies between these tasks follows.



For more information about setting up task template and task profiles when you're using commitment accounting, see Task Reporting with PeopleSoft Financials.

PC Business Unit (project costing business unit)

The business unit entered by the time reporter determines the values available for the Project ID, Activity, Resource Type, Resource Category, and Resource Subcategory fields.

Project ID

If you select a project ID on the task template, and you're not using commitment accounting, the projects to which a person can report time are determined by the PC business unit.

Activity

If you select an activity on the task template, time reporters are able to enter time for those activities, defined in PeopleSoft Project Activity tables that are associated with the business unit with which the project is affiliated.

Resource Type, Resource Category, and Resource Subcategory

In PeopleSoft Projects, you can define dependencies between resource types, categories, and subcategories (through the dynamic edit options defined on the Projects Business Unit Definition page). These relationships control data entry and help reduce errors.

The valid values that time reporters can enter for the resource Type, category, and sub-category also depend on the reported PC business unit.

For more information about the relationships between resources, see Projects, "Maintaining Projects" in your PeopleSoft Projects PeopleBook.

Populating the Task Entity Prompt Tables

Values for the six project-related task entities are defined in PeopleSoft Projects and made available to PeopleSoft Time and Labor through PeopleSoft Application Messaging. For example, when you instruct the system to prompt users for a resource type when they report time, users can select the resource type from a prompt table that lists the resource types defined in Projects.

In PeopleSoft Time and Labor, you can view, but not modify the project-related task values on the following pages: View Business Unit PC page, PC Project Descr page, View Project Activity page, View Project Resource Type page, View Project Resource Category page, and View Project Resource Sub Catg page.

PeopleSoft Projects initiates the transmission of project values to PeopleSoft Time and Labor. The process it uses depends on the version of PeopleSoft Projects that you're using:

- The commercial version uses PeopleSoft Application Messaging with XML transmission.
- PeopleSoft Education and Government uses PeopleSoft Application Messaging with flat file transmission.

As users add or change project-related data in PeopleSoft Projects, the PeopleSoft Human Resources Management (HRMS) tables are updated in real-time to reflect the changes.



When a “full table” publish is initiated in PeopleSoft Projects, all task values are deleted from the HRMS tables before the current set of values is loaded. Consult with your PeopleSoft Projects administrator regarding the timing of full-table publishes. We recommend that they be performed when users are not entering time through Time and Labor.

Generating Exceptions When Time Is Reported to Closed Projects

When you close a project in PeopleSoft Projects, the Project Status field (PROJECT_STATUS) in the PS_PROJECT_STATUS table in PeopleSoft Time and Labor is automatically populated with a C (closed). You can create a rule that generates an exception when the Time Administration process encounters reported time with a project status of C.



For more information about creating rules, see *Creating Rules in Time Administration*.

Restricting Time Entry to Project Teams

In PeopleSoft Projects, you can select an Enforce Project Team option for all projects associated with a particular business unit. When this option is activated, PeopleSoft Time and Labor only permits time reporters to enter time for projects on which they are team members.

Publishing Estimated and Actual Cost Data to PeopleSoft Projects

You can send both estimated and actual time and cost data to PeopleSoft Projects.

- Estimated costs are those calculated by the Time Administration process before payable time is sent to payroll. When estimated costs are sent to Projects, Projects replaces any previously received estimated payable time with the entries received from PeopleSoft Time and Labor.
 - Actual costs are those your payroll system calculates for payable time and returns to Time and Labor after the completion of a pay run. PeopleSoft Projects considers all payable time it receives to be additions to previously received time. PeopleSoft Time and Labor sends offsets in the rare cases when there is updated actual time.
-



For more information about how estimated costs are calculated, see *Calculate Estimated Gross* in the *Understanding Batch Processing in Time and Labor* section. For more information about the enterprise integration points used to transmit actual and estimated cost data to PeopleSoft Projects, see *Understanding Integration with PeopleSoft Time and Labor*.

When Estimated Costs are Published to PeopleSoft Projects

Estimated payable time is published to PeopleSoft Projects in the following cases:

- When PeopleSoft Time and Labor receives a request from PeopleSoft Projects. The request arrives in the form of a message from the PeopleSoft Financials database. In response, PeopleSoft Time and Labor automatically publishes estimated time for payable time records with a payable status of *Estimate*, *Needs Approval*, *Approved*, *Sent*, *Rejected*, and *Taken*.
- When you run the Publish Estimated Payable Time process, described later in this section. In this case, PeopleSoft Time and Labor publishes all estimated time for payable time records with a payable status of *Estimate*, *Needs Approval*, *Approved*, *Sent*, *Rejected*, and *Taken*.

When Actual Costs are Published to PeopleSoft Projects

Actual payable time is published to PeopleSoft Projects:

- When you run the Publish Actual Payable Time process, described later in this section. In this case, PeopleSoft Time and Labor publishes all closed payable time records.
- When you use the Approve Payable Time page, the Approve Payable Time – Group page, or the Batch Approval page to:
 - Close payable time for time reporters whose time is not sent to payroll. (The Send to Payroll option is not activated on the Maintain Time Reporter page.)
 - Close payable time for a TRC that is not sent to payroll. (The Send to Payroll option is not activated on the TRC 2 panel.)
- Make a record adjustment to a payable time entry. Time and Labor publishes both the new entry and an entry that offsets the original entry. (Record adjustments are not sent to payroll, only prior-period adjustments are sent.)
- When you adjust a record adjustment.

Other actions that cause actual payable time to be published vary by payroll system and are listed below.



For more information about payroll integration see Integrating with Payroll Applications.

PeopleSoft Payroll for North America

When PeopleSoft Time and Labor is integrated with Payroll for North America, actual time and cost data is published in the following cases:

- When Payroll for North America sets the status of successfully processed payable time entries to *Closed*. This happens because you have elected not to use labor distribution. Publishing occurs at the end of the load process.
- At the completion of the Extract process launched in Payroll for North America. Publishing

occurs after costs have been labor distributed (and diluted if you've also activated the labor dilution feature).

- After rerunning the Extract process. If you unconfirm a pay run after running the Extract process, make changes to payable time, and then rerun the payroll, you can launch the Extract process again.

PeopleSoft Global Payroll

When PeopleSoft Time and Labor is integrated with PeopleSoft Global Payroll, actual time and cost data is published in the following cases:

- When PeopleSoft Global Payroll sets the status of successfully processed payable time entries to *Closed*.

This happens because you have elected not to use labor distribution. Publishing occurs at the end of the update process that's initiated through the PeopleSoft Time and Labor Run Control in PeopleSoft Global Payroll.

- At the completion of the Labor Distribution or Labor Dilution process that's triggered automatically at the end of the update process that you launch through the Time and Labor Run Control page in Global Payroll.

Publish Estimated Payable Time Page

Usage	If the version of PeopleSoft Projects you are using retrieves data through flat files, use the Publish Estimated Payable Time page to initiate the transmission of estimated costs. You can also use this page to transmit estimated cost data to other applications. If your version of PeopleSoft Projects uses XML to transmit data, estimated payable time is published automatically in response to a request message from PeopleSoft Projects. You can use this page to publish estimated payable time if you do not want to wait for the request message.
Object Name	TL_RUN_PUB_TIME
Navigation	Administer Workforce, Capture Time and Labor, Process, Publish Est Payable Time
Prerequisites	Run the Time Administration process to generate estimated costs.
Access Requirements	Enter the run control ID without spaces. You can enter up to 30 alphanumeric characters.

Publish Estimated Payable Time

Run Control ID: sample
[Report Manager](#)
[Process Monitor](#)

Publish Estimated Payable Time page

Run Control ID

This field displays the run control ID you entered to access the page.

Run

Click the Run button to run this request. The Process Scheduler runs the TL_PUB_TM_AE process at user-defined intervals.

For more information about the Process Scheduler, see PeopleSoft Payroll PeopleBooks in your PeopleTools PeopleBook.

Publish Actual Payable Time Page

Usage	Use the Publish Actual Payable Time page if you want to publish time with a payable status of Closed before you run the extract process in Payroll for North America. To retrieve the published data, the receiving application must subscribe to the Actuals message. (Payable time that has been labor-distributed or labor-diluted is not published.)
Object Name	TL_RUN_PUB_ACTUALS
Navigation	Administer Workforce, Capture Time and Labor, Process, Publish Act Payable Time
Prerequisites	In Payroll for North America, you must confirm the pay run before publishing cost data.
Access Requirements	Enter the run control ID without spaces. You can enter up to 30 alphanumeric characters.

Publish Actual Payable Time

Run Control ID: sample
[Report Manager](#)
[Process Monitor](#)

Publish Actual Payable Time page

Run Control ID

This field displays the run control ID you entered to access the page.

Run

Click the Run button to run this request. The Process Scheduler runs the TL_PY_PUB_TM process at user-defined intervals.

For more information about the PeopleSoft Process Scheduler, see PeopleSoft Payroll PeopleBooks in your *PeopleSoft PeopleTools* PeopleBook.

Commitment Accounting

Commitment accounting, part of the Commitment Control feature in PeopleSoft Financials 8, helps your organization track financial obligations accurately and ensure that planned and actual expenses do not exceed budget.

When you set up account codes in PeopleSoft Financials, you identify those that are subject to commitment accounting. An account code (also referred to as a *funding source*) is simply a key that defines a valid combination of general ledger ChartFields. These are the codes that you attach to components of your budget, such as earnings and deductions, to indicate the funding source the system should attribute to each expense. For example, if you account for salaries by department and project, you might attach a ChartField called Department and another called Project to the Salaries account code.

If you're using PeopleSoft Financials with PeopleSoft Time and Labor you can integrate commitment accounting functionality with task reporting. This makes it possible for Time and Labor to automatically retrieve certain ChartField values when time reporters enter their time.

If PeopleSoft Time and Labor is also integrated with PeopleSoft Payroll for North America, the labor costs you send back to PeopleSoft Projects after a pay run are broken down by ChartField.

This section explains how to integrate the commitment accounting functionality with PeopleSoft Time and Labor's task reporting functionality.



For more information about the commitment accounting functionality, see your PeopleSoft Human Resources Management Managing Commitment Accounting. For more information about integration with PeopleSoft Projects, see PeopleSoft 8 Projects PeopleBook.

Understanding the Commitment Accounting Interface

To use the commitment accounting functionality with PeopleSoft Time and Labor, you must create task templates, task profiles, and task groups that are enabled for the commitment accounting functionality. You then assign each time reporter who works in a department that's set up for commitment accounting functionality to a taskgroup that's defined for commitment accounting.

When time reporters enter their time, they must provide an account code, along with any other task elements you selected when defining the task template. PeopleSoft Time and Labor uses the account code to retrieve the appropriate ChartField values for the following fields:

Account	Fund Code
Altacct (alternate account)	Operating Unit
Affiliate	Product
Class Field	Program Code
Department	Project ID



ChartField values are stored in the PS_ACCT_CD_TBL table in the Financials database and are exported to the Human Resources database through Application Messaging, where PeopleSoft Time and Labor can retrieve them.



For more information about how PeopleSoft Human Resources retrieves ChartField values from the Financials database, see Setting Up Valid Account Codes in the Commitment Accounting section of your *PeopleSoft Human Resources Management PeopleBook*.

When you run the Time Administration process, PeopleSoft Time and Labor performs the following validations on time reporters who belong to a commitment accounting taskgroup:

- Verifies that, if a taskgroup was positively reported, the taskgroup is defined for commitment accounting. If the taskgroup is not defined for commitment accounting, the system generates an exception.
- Determines if the time reporter changed departments or if the Use Actuals Distribution flag for the department changed. If either situation occurred, the Time Administration process generates an exception for the time reporter's default taskgroup. You can use the Maintain Time Reporter Data page to change the default taskgroup.

If you send payable time to PeopleSoft Payroll for North America for processing, you can distribute costs associated with account codes and ChartFields back to PeopleSoft Projects after a pay run.

Setting Up Time and Labor for Use with Commitment Accounting

To integrate PeopleSoft Time and Labor with the commitment accounting functionality, you need to:

- Ensure that the appropriate distribution options are selected for departments subject to commitment accounting if you're using PeopleSoft Payroll for North America.
- Set up task templates, task profiles, and taskgroups for commitment accounting.
- Enroll time reporters into taskgroups defined for commitment accounting.
- Ensure that your PeopleSoft Human Resources System administrator has run the Account Code Load process to load ChartField data from the Account Code table into the PeopleSoft Financials database.

The first three items are described below.

Selecting Distribution Options for Commitment Accounting Departments

The Department table, accessed through PeopleSoft Human Resources, controls whether a department participates in commitment accounting and whether PeopleSoft Time and Labor data

is used when the commitment accounting Actuals Distribution process runs for the department. The Actuals Distribution process—not to be confused with the Labor Distribution process—automatically distributes actual earnings, deductions, and employer taxes calculated by PeopleSoft Payroll for North America, across account codes (funding sources) and uses the Pay Message table to notify users when a department's budget has been exceeded. After you run the Actuals Distribution process you can run a separate process (in Payroll for North America) that creates the general ledger transactions for your PeopleSoft General Ledger system.

To configure the commitment accounting feature so that the Actuals Distribution process takes into account the task information reported through PeopleSoft Time and Labor, access the Comm Acctg and EG page for each department that's set up to use the Actuals Distribution process. Select the Use TL Distribution check box and the Use Actuals Distribution check box, if it is not already selected.

Now, when you run the Actuals Distribution process, it uses the labor-distributed (not labor-diluted) costs as the source of funding. That is, the process creates an entry for each account code to which time was reported in PeopleSoft Time and Labor and distributes the costs in the same ratio that was used for labor distribution.



For more information about activating commitment accounting for a department and selecting the Use Actual Distributions feature, see Maintaining Departments in the Setting up Control Tables section of your *PeopleSoft Application Fundamentals PeopleBook*.

Setting Up Task Templates, Task Profiles, and Taskgroups for Commitment Accounting

Use the task reporting pages in PeopleSoft Time and Labor to create the following:

- Task templates that are enabled for commitment accounting.

To activate commitment accounting, select the Commitment Accounting check box on the Task Template page when you create the task template.

- Task profiles that are enabled for commitment accounting.

To enable a task profile for commitment accounting, link it to a task template that's defined for commitment accounting by selecting the template in the Task Template ID field on the Task Profile Page.

- Taskgroups that are enabled for commitment accounting.

Select the Commitment Accounting check box on the Taskgroup Page when creating the template.



For more information about task reporting, see Defining Task Reporting Requirements.

Enrolling Time Reporters in Taskgroups Defined for Commitment Accounting

Use the Create Time Reporter Data page to assign a commitment accounting taskgroup to each time reporter who works in a department that's subject to commitment accounting.

Distributing Costs after a Pay Run

Once you confirm a pay run in Payroll for North America, run the Actuals Distribution process with PeopleSoft Time and Labor. This process, which you launch within Payroll for North America, extracts time and labor data then runs the Actuals Distribution process.

For employer deductions and employer taxes, the system first looks for an account code specified on the employee's job record. If none is found, it uses the account code on the Department Budget page. If there is no Department Budget page information entered for a department, the Actuals Distribution process cannot distribute the actual costs.

PeopleSoft Enterprise Performance Management

PeopleSoft Enterprise Performance Management (EPM) enables you to collect and use data generated by other enterprise applications, such as PeopleSoft Time and Labor, to analyze your business processes, profitability, and key performance measures.

When you select Interface with PS/EPM on the TL Installation Page, you can include Business Unit PF and FS Activity as task entities on your task templates and task profiles. Time and Labor retrieves the values for these task entities from the PeopleSoft Financials database.

When time is reported using any of the values in the Business Unit PF table or the FS Activity table, the resulting payable time entries become available for extract by PeopleSoft Enterprise Performance Management once they reach the frozen state. You can then use the data within your financial analyses.

PeopleSoft Expenses with Mobile Time and Expense



For more information on how PeopleSoft Projects integrates with PeopleSoft Mobile Time and Expense, see the PeopleSoft 8 Mobile Time and Expense PeopleBook.

PeopleSoft Mobile Time and Expense, used with PeopleSoft Expenses, provides a convenient time reporting solution for traveling professionals. Elapsed time reporters can complete timesheets and expense reports while away from the office and—when they have access to the network—upload the reports to PeopleSoft Expenses. PeopleSoft Expenses can then send the reported time to PeopleSoft Time and Labor through Application Messaging, where it can be converted to payable time and sent to your payroll application.

If you've integrated PeopleSoft Projects with both PeopleSoft Expenses and Time and Labor, remote time reporters can track the time they spend on the projects, activities, business units,

resource types, resource categories, and resource subcategories defined in PeopleSoft Projects. (The business unit associated with the time reporter's employee ID and employee record number determines which set of control data is sent to the user.)



Both PeopleSoft Time and Labor and Expenses can send reported time directly to PeopleSoft Projects. To avoid sending the same data twice, we recommend that you use either Time and Labor or Expenses exclusively to send reported time.

How Users Enter and Submit Time Through PeopleSoft Mobile Time and Expense

Remote time reporters who have PeopleSoft Mobile Time and Expense installed on their computers can access an online timesheet and report time to the time reporting codes that were mapped to the timesheet during implementation.



PeopleSoft Expenses provides a similar timesheet that can be accessed through the web by users who have access to PeopleSoft Expenses.

Time reporters have two options for submitting timesheets:

- Regular Submit.

With a regular submit, time reporting data is submitted in real-time to PeopleSoft Expenses. A validation process rejects invalid entries on the spot.

- Express Submit.

With an express submit, users can send reported time to PeopleSoft Expenses with an XML file that the system validates later. If the validation process encounters invalid data, it rejects the entire timesheet.

PeopleSoft Time and Labor accepts time from the current period and well as adjustments to prior time periods.

Setting Up Time and Labor for Use with Mobile Time and Expense



For more information about setting up PeopleSoft Mobile Time and Expense to work with PeopleSoft Time and Labor see the PeopleSoft 8 Mobile Time and Expense PeopleBook.

To integrate PeopleSoft Time and Labor with Mobile Time and Expense, you need to do the following:

- Ensure that remote users are set up as time reporters in PeopleSoft Time and Labor
- Publish TRC information to the PeopleSoft Financials database.

These requirements are described below.

Enrolling Time Reporters in PeopleSoft Time and Labor

Each person who reports time through PeopleSoft Mobile Time and Expense must be a time reporter in PeopleSoft Time and Labor. Use the Create Time Reporter Data page to set up time reporters. Set the Status field for these time reporters to *Active*.

Workgroup Assignment

Make sure that the workgroup you assign to the time reporter through the Create Time Reporter page is:

- Associated with a TRC Program that includes all time reporting codes—other than REG and OT—that are used by PeopleSoft Mobile Time and Expense.
- Associated with a Rule Program that includes a default REG rule. When time reporters enter regular time through Mobile Time and Expense, they enter hours without specifying REG as the TRC. Your default rule should assign REG to all hours that are reported without a TRC. Your overtime rules can then convert any REG time that exceeds a certain threshold to overtime.



If PeopleSoft Time and Labor receives data for employees who are not set up in Time and Labor, the person's employee ID and employee record are placed in the TCD Elapsed Error Queue.

Publishing TRCs to Mobile Time and Expense

PeopleSoft Time and Labor publishes TRCs to the PeopleSoft Financials database. PeopleSoft Expenses then subscribes to the “full sync” message and retrieves information for all TRCs.

In PeopleSoft Expenses, a user maps selected TRCs (except REG and OT) to the correct positions on the time-reporting grid used within the timesheet. By default, the online timesheet displays the TRC descriptions you defined in PeopleSoft Time and Labor; however, the Expense's administrator can override the descriptions.



For more information about the enterprise integration point used to publish TRCs, see Understanding the Integration Points.

Synchronizing Data

Time reporters can refresh TRC and project data (the control data) whenever they want. If a user enters time without first refreshing the control data, and TRCs or project data has changed, an error message appears when the user tries to submit the timesheet.

The user must refresh the control data before continuing.

Retrieving Time from Mobile Time and Expense

To pull reported time into PeopleSoft Time and Labor after it's been submitted to PeopleSoft Expenses, a batch process must be invoked from PeopleSoft Expenses. This process loads reported time into a staging table. Depending on how Expenses is configured, entries may need to be approved before they can be published to Time and Labor.

Once the entries in the staging table are ready for publication, PeopleSoft Expenses uses the same application programming interface (API) as that's used for the TCD interface to publish the time entries to PeopleSoft Time and Labor.

Overview of Time and Labor Reports

PeopleSoft applications offer a wide range of query and reporting possibilities—with the standard reports we deliver and with the reporting tools you can use to create new reports from scratch. Your database contains a wealth of information that you have carefully entered, maintained, and secured for the ultimate purpose of generating timely, meaningful, presentation-quality reports. Our reporting capabilities enable you to access the data you need and present it in the form that is most useful for those who depend on you for financial and management information.

You no longer have to rely on technical support staff to create queries or reports for you. That means that you can get all the information you need, when you need it.

In this section, we'll provide you with:

- A brief discussion of PeopleSoft reporting tools.
- Names and descriptions of the reports that are provided with PeopleSoft Time and Labor.



For more information about how to run individual Time and Labor reports, see, Running Time and Labor Reports.

PeopleSoft Reporting Tools

We deliver PeopleSoft applications with a set of standard reports that provide the kind of business information many organizations need. Running a report is as easy as selecting it from a menu and entering any necessary parameters. But for those of you who want to modify our standard reports, create your own reports, or reformat report output, we offer a variety of reporting tools.

PeopleSoft Query

PeopleSoft Query helps you create and run database queries without having to write SQL statements. You can extract the precise data you want, using visual representations of your PeopleSoft database. The queries can be as simple or as complex as necessary, and they can be one-time, ad hoc queries or queries that you'll use repeatedly.

Query is more than just a reporting tool. You can use it to create queries for a variety of purposes:

- **To display data in a list box.** You can run queries within Query itself, displaying the result set in a list box for review. This option is useful as you are refining your queries.

- **To provide input to a spreadsheet or Crystal report.** Query can seamlessly pass data to Microsoft Excel, Lotus 1-2-3, or Crystal Reports Pro. From there, you can use the features of these products to create polished reports.
- **To search for records.** Many of the search dialog boxes in PeopleSoft applications enable you to select a predefined query or create a new one, rather than enter search criteria for the records you want to find.
- **To check the database for conditions that trigger workflow events.** Using PeopleSoft Workflow, you can specify that certain conditions—say, the presence of overdue receivables—cause the system to send an email to someone or put an entry on someone's work list. You write queries to detect these conditions, and then you schedule database agents to run them periodically.

Structured Query Reports (SQRs)

One of the most versatile approaches to reporting is the MITI Structured Query Report Writer. This tool can extract data from any SQL-based relational database and print or display it in a prescribed format. We've created a variety of standard SQR reports that summarize table information and data. You can use these reports as is, modify them, or, if needed, create your own. You can create tabular, single- or multiple-page reports, and form letters. You can also use SQR to make global updates to your database, load and unload tables, and perform interactive queries.

Process Scheduler

The Process Scheduler is not a reporting tool, but it plays an important role in PeopleSoft reporting. It's the part of the system that actually runs most of the reports. When you request one of the standard reports, you are really asking the Process Scheduler to run it for you.

The Process Scheduler is a PeopleTool that performs tasks behind the scenes of your application. It can run several kinds of processes—COBOL programs, database queries, reports—on a regular schedule or at your request. Furthermore, it can run the processes at your workstation or on a server. The Process Scheduler handles reports because you would typically like the system to generate the report while you continue to work on something else. The Process Scheduler also enables you to track the status of the report.



For more information about the Process Scheduler, see

Alphabetic List of Time and Labor Reports

Report Name	Report ID	Description	Report Type
Payable Status Report	TL001	This report list all Payable time for a range of dates, sorted by the chosen Payable Statuses on the run control, to provide the manager with a picture of processed and unprocessed time.	SQR
Scheduled Hours Report	TL004	This report provides information about time reporter's scheduled time. It gives details such as: punch types and times for employees with a punch schedule; duration of work hours for employees with an elapsed schedule; and In, Out, Flex, and Core Period for time reporters with flex schedules.	SQR
TCD Usage Report	TL003	The Usage report sums up the number elements transmitted to a Time Collection Device for time reporting. The report is a tool that can assist in the process of estimating memory usage at each Time reporting Device	SQR

Report Name	Report ID	Description	Report Type
Time Card Report	TL002	This report is to display all punch time rows, elapsed time rows, payable time rows, and unresolved exceptions for an individual employee for the period selected on the run control. The report can be run by either an individual employee, or by group. After each employee is reported, there are lines for approval signatures for the employee and the approving supervisor.	SQR

Numeric List of Time and Labor Reports

Report ID	Report Name	Description	Report Type
TL001	Payable Status Report	This report list all Payable time for a range of dates, sorted by the chosen Payable Statuses on the run control, to provide the manager with a picture of processed and unprocessed time.	SQR

Report ID	Report Name	Description	Report Type
TL002	Time Card Report	This report is to display all punch time rows, elapsed time rows, payable time rows, and unresolved exceptions for an individual employee for the period selected on the run control. The report can be run by either an individual employee, or by group. After each employee is reported, there are lines for approval signatures for the employee and the approving supervisor.	SQR
TL003	TCD Usage	The Usage report sums up the number elements transmitted to a Time Collection Device for time reporting. The report is a tool that can assist in the process of estimating memory usage at each Time reporting Device	SQR
TL004	Scheduled Hours Report	This report provides information about time reporter's scheduled time. It gives details such as: punch types and times for employees with a punch schedule; duration of work hours for employees with an elapsed schedule; and In, Out, Flex, and Core Period for time reporters with flex schedules	SQR

CHAPTER 19

Running Time and Labor Reports

PeopleSoft time and Labor is delivered with a series of reports and table listings. This section explains how to generate PeopleSoft Time and Labor reports and details the output results of those reports.



For details on how to run reports, see your PeopleTools Reporting and Analysis Tools PeopleBook.

Payable Status Report

Usage	Use the Payable Status Report page to run the Payable Status report.
Object Name	TL_RUNCTL_TL001
Navigation	Administer Workforce, Capture Time and Labor, Reports, Payable Status Report
Prerequisites	Running Time Administration process to create Payable Time.
Access Requirements	Enter a run control ID.

Payable Status Report

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Description:

Start Date: End Date:

☐ Approved	☐ Estimated	☐ Rejected
☐ Closed	☐ Needs Approval	☐ Sent to Payroll
☐ Diluted	☐ Paid	☐ Taken by Payroll

Payable Status Report page



From a troubleshooting perspective, after your pay period has passed, you should check to see if you have payable time that remains in a *Rejected*, *Sent* or *Taken by Payroll* status. This payable time review is necessary to determine what is causing the time to remain in this state.

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Report Manager, Process Monitor, Run.**

Start Date Enter the first date in a range, for which you would like to see the employee payable status.

End Date Enter the last day in a range, for which you would like to see the employee payable status.

Payable Status Values

These are the nine possible values that can be displayed, based upon what you select on the Payable Status Run Control.

Approved Payable Time in this status has been approved in Time and Labor and is ready for a payroll system to select it for payment. The Payable Time is in a Frozen State and can be selected by financial systems as estimated costs.

Closed Payable Time in this status may have been published to PS/Projects. The Payable Time is in a Frozen State and can be selected by other financial systems as actual costs. Payable Time that has been closed is as a result of one of the following situations:

- TRC reported is not being sent to a Payroll System
- The Time Reporter does not have time being sent to a payroll system
- A record adjustment
- Payable Time that is going to a payroll system, but will not be labor distributed

Diluted Payable Time in this status has been paid by a payroll system and has run through the process of Labor Distribution with Dilution. Payable Time with TRCs that are selected for Labor Dilution will be reflected in this status. The Payable Time is in a frozen state and can be selected by other financial systems as actual costs.

Estimated	Payable Time in this status is not in a frozen state and can be updated by the Time Administration process. This Payable Time can be selected by other financial systems as estimated costs.
Needs Approval	Payable Time in this status is not in a frozen state and can be updated by the Time Administration process. This time can be selected by other financial systems as estimated costs. This time requires approval either through online or batch process in Time and Labor.
Paid	Payable Time in this status has been paid by a payroll system and has run through the process of Labor Distribution. Labor Dilution may have been run for the Pay System, but the TRCs related to this Payable Time were not selected for Labor Dilution. The Payable Time is in a frozen state and can be selected by other financial systems as actual costs.
Rejected	Payable Time in this status has been Rejected by a payroll system, as it does not meet the payroll's selection criteria. The Payable Time is in a frozen state and can be selected by another pay system for payment.
Sent to Payroll	Payable Time in this status has been selected by a payroll system. The Payable Time is in a frozen state. This time can be selected by other financial systems as estimated costs.
Taken by Payroll	Payable Time in this status has been paid by a payroll system and has not yet run through the process of Labor Distribution. The Payable time is in a frozen state and can be selected by other financial systems as estimated costs.



Note: From a troubleshooting perspective, after your pay period has passed, you should check if you have Payable Time that remains in a **Rejected**, **Sent** or **Taken** status. This Payable Time review is necessary to determine what is causing the time to remain in this state.



For more information about PeopleSoft Process Scheduler, see Running Processes with the Process Scheduler in PeopleSoft Application Fundamentals. For more information about the Payable Status report, see Understanding Payable Time.

Payable Status Report

Description	This report lists all payable time for a range of dates, sorted by the chosen Payable Statuses on the run control, to provide the manager with a picture of processed and unprocessed time.
Parameters	Description, Start Date, End Date, Approved, Closed, Diluted, Estimated, Needs Approval, Paid, Rejected, Sent to Payroll, Taken by Payroll
Source	TL_RUNCTL_TL001
Source Records	PS_TL_PAYABLE_TIME
Sorted By	The chosen Payable Statuses on the Run Control.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.



Note. This report provides functionality to replace the Scheduled Hours report, TL009.SQR in prior versions.



For more information about the Scheduled Hours report see, Defining Employee Schedules. For more information about PeopleSoft Process Scheduler, see Running Processes with the Process Scheduler in PeopleSoft Application Fundamentals Scheduled Hours Report.

Generating a Schedule Hours Report

Usage	Use the Schedule Hours Report page to run the Scheduled Hours report.
Object Name	TL_SCHRPT_RNCTL
Navigation	Administer Workforce, Capture Time and Labor, Reports, Schedule Hours Report
Prerequisites	Employees must have scheduled assignments.
Access Requirements	Enter a run control ID.

Schedule Hours Report page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: Report Manager, Process Monitor, Run, Language.

Start Date	Enter the first date in a range, for which you would like to see the employee schedule.
End Date	Enter the last day in a range, for which you would like to see the employee schedule.
Run Control ID	Enter the ID of the time reporter that is used to access the page.
EmplID	Select the time reporter that you want to include or exclude from the report.
Empl Rcd#	Select the appropriate value for this time reporter.
Group ID	Select the group for which you would like to run the report.
Include/Exclude Indicator	When running this report for a group, use the Include/Exclude Indicator to include additional time Reporters or exclude specific Time Reporters from the indicated group.



Note. This report provides functionality to replace the Scheduled Hours report, TL009.SQR in prior versions.



For more information about the Schedule Hours report see, Defining Employee Schedules. For more information about PeopleSoft Process Scheduler, see Running Processes with the Process Scheduler in PeopleSoft Application Fundamentals Scheduled Hours Report.

Schedule Hours Report

Description	This report provides information about a time reporter's scheduled time. It gives details such as: punch types and times for employees with a punch schedule; duration of work hours for employees with an elapsed schedule; and the values for the In, Out, Flex, and Core Period fields for time reporters with flex schedules.
Parameters	Start Date, End Date, Language, EmplID, Empl Rcd#, Group ID, Include/Exclude Indicator
Source	TL_SCHRPT_RNCTL
Source Records	PS_SCH_ADHOC_RPT
Sorted By	Employees name- (last name, first name).



Note: For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.

Generating a TCD Usage Report

Usage	Use the Publish Setup Data to TCD page to run the TCD Usage Report.
Object Name	TL_TCD_RUN_PNL
Navigation	Administer Workforce, Capture Time and Labor, Process, Publish Setup Data to TCD
Prerequisites	None
Access Requirements	Enter a run control ID.

TCD Usage Report page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Report Manager, Process Monitor, Run.**

Run Control ID

Enter the ID of the time reporter that is used to access the page.

Message Publish Attributes**Publish To**

Msg Nodes/Comm Servers. Select this option if you want the system to publish the information to all your TCDs (message nodes).

- **Specific MsgNodes/Comm Servers.** Select this option if you want the information to be sent to a specific message node, or TCD. When you select this option, the **Message Node/Comm Servers** scroll area displays. You must then enter the message node or comm server ID to which you want to send the information in the **Message Node Name** field. Comm serv is used for flat file integration. Message node is used for XML integration and uses PeopleSoft Application Messaging technology. The field changes based on the TCD type you have selected.

TCD Usage Report Attributes**Generate TCD Usage Reports**

Select this check box if you want the system to generate a summary TCD Usage report for this TCD run.

Include Detail

You can decide to run just the summary page of the TCD Usage report, or both the summary and detail sections of the report. If you want both, select both the **Generate TCD Usage Report** and **Include Detail** check boxes.

Language Code

The language code you choose for this report provides you with the descriptions of the fields in the language of your TCD.



For more information about PeopleSoft Process Scheduler, see Running Processes with the Process Scheduler in PeopleSoft Application Fundamentals. For more information about TCD usage, see-Using a Time Collecting Device.

TCD Usage Report

Description	The Usage report sums up the number of elements transmitted to a time collection device for time reporting. The report is a tool that can assist in the process of estimating memory usage at each time collection device.
Parameters	Run Control ID, Process Monitor, Report List, Process Request, Publish To, Generate TCD Usage Report, Include Detail, Language.
Source	TL_TCD_RUN_PNL
Source Records	PS_TL_TRC_TAO, PS_TL_TKPRF_TAO, PS_TL_TKTMP_TAO, PS_TL_TMPDL_TAO, PS_TL_CDVAL_TAO, PS_TL_EMPL_TAO, PS_TL_SCHED_TAO, PS_TL_RESPF_TAO, PS_TL_TTHRS_TAO, PS_TL_RPTTEL_TAO, PS_TL_SUPVR_TAO
Sorted By	Sorted by TCD.



Note: For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.

What is actually sent to the time collection device is determined by the parameters defined on the TCD Type pages associated to each TCD.

Report Attributes

As noted above, you can decide to run just the summary page of the TCD Usage report, or both the summary and detail sections of the report.

For the summary of the Usage report, we list the following:

- The number of time reporters sent to the TCD.
- The number of rows of total payable time hours sent for the time reporter's current period.
- The number of punches from the time reporters' punch schedules.
- The number of time collection device supervisors associated with that TCD.
- The number of restriction profiles associated with that TCD.
- The number of time reporting codes sent to the TCD.
- The number of task templates sent to the TCD.
- The number of task elements sent to the TCD.
- The number of task values sent to the TCD.
- The number of countries sent to the TCD.
- The number of states sent to the TCD.
- The number of localities sent to the TCD.
- The number of compensation rate codes sent to the TCD.
- The number of override reasons sent to the TCD.
- The number of currency codes sent to the TCD.

For the detail page of the Usage report, the following elements are detailed if they are sent to your TCD:

- Time reporter-
 - Employee ID
 - Record #
 - Badge ID
 - First name
 - Last name
- TCD supervisors
 - Supervisor ID
 - Badge ID
- Restriction profiles
 - Restriction profiles

- Description
- Time reporting codes
 - Time reporting code
 - Description
- Task profiles
 - Task profileID
 - Description
- Task templates
 - Task template
 - Description
- Task elements
 - Task template ID
 - Task element code
 - Description

Generating a Time Card Report

Usage	Use the Time Card Report page to run the Time Card report.
Object Name	TL_RUNCTL_TL002
Navigation	Administer Workforce, Capture Time and Labor, Reports, Time Card Report
Prerequisites	Time Reporter's must have exceptions, reported time, or payable time recorded.
Access Requirements	Enter a Run Control ID

Time Card Report page

The following elements are common to multiple pages in this application and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Language**.

Run Control ID	Enter the ID of the time reporter that is used to access the page.
Start Date	Select the Start Date for the time period for which you want to produce the report.
End Date	Select the End Date for the time period for which you want to produce the report.
EmplID	Select the time reporter that you want to include or exclude from the report.
Empl Rcd#	Select the appropriate value for this time reporter.
Group ID	Select the group for which you would like to run the report.
Include/Exclude Indicator	When running this report for a group, use the Include/Exclude Indicator to include additional time Reporters or exclude specific time Reporters from the indicated group.



Note. This report provides functionality to replace the Reported Time by TRC report, TL006.SQR in prior versions.

Time Card Report

Description	This report will display all punch time, elapsed time rows, payable time, and unresolved exceptions for an individual employee for the period selected on the run control. The report can be run by either an individual employee, or by a group. The report also contains lines for approval signatures for both the employee and the approving supervisor.
Parameters	Start Date, End Date, Language, EmplID, Empl Rcd#, Group ID, Include/Exclude Indicator
Source	TL_RUNCTL_TL002
Source Records	PS_TL_RPTD_ELPTIME, PS_TL_EXCEPTION, PS_TL_RPTD_PCHTIME, PS_TL_PAYABLE_TIME.
Sorted By	Employee ID.



For more information about PeopleSoft Process Scheduler, see Running Processes with the Process Scheduler in *PeopleSoft Application Fundamentals*.

Note. For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation

CHAPTER 20

Appendix A: Exceptions and Validations

<i>Nbr</i>	<i>Validation Definition ID</i>	<i>Validation Definition</i>	<i>Validation Comments</i>	<i>Exception Definition ID</i>	<i>Exception Description</i>	<i>Processed in Time Admin.</i>
1	TLX00001	Invalid Comp Time TRC/Balance	Verify that 1. the Reported Comp Time TRC is valid 2. the Comp Time balance is valid as per the Comp Time Plan.	TLX00001	Invalid Comp Time TRC/Balance	X
2	TLX00010	Invalid Leave Time Taken	Verify that the NA Earnings Code associated with the reported TRC is mapped to a Plan Type in the EARNINGS_ACCRL table.	TLX00010	Invalid Leave Time Taken	X
3	TLX00030	Time Reporting Status Check	Verify that the TIME_RPTG_STATUS of the time reporter on the TL_EMPL_DATA record is 'Active', as of the date reported in Elapsed Time.	TLX00030	Inactive Time Reporter Status	
4	TLX00040	Valid Taskgroup	Verify that the Taskgroup is in the TL_TASKGRP_TBL, as of the date reported in Elapsed Time.	TLX00040	Invalid Taskgroup	X
5	TLX00050	Active Taskgroup	Verify that the Taskgroup is 'Active' as of the date reported in Elapsed Time.	TLX00050	Inactive Taskgroup	X
6	TLX00060	Valid Task Profile ID	Verify that the Task Profile ID is in the TL_TSKPRF table, as of the date reported in Elapsed Time.	TLX00060	Invalid Task Profile	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
7	TLX00070	Task Prof in Default Tskgrp	Verify that the Task Profile ID is in the TL_TSKGRP_PRFL table for the time reporter's default taskgroup, as of the date reported in Elapsed Time.	TLX00070	Task Profile not in Taskgroup	X
8	TLX00080	Task Prof in Borrowed Tskgrp	Verify that the Task Profile ID is in the TL_TSKGRP_PRFL table for the task group to which the time reporter has been borrowed, as of the date reported in Elapsed Time.	TLX00080	Task Profile not in Taskgroup	
9	TLX00090	All/ None Req'd Task Elements	Verify that either all or none of the required task elements of the task template have been reported in Elapsed Time.	TLX00090	Task Values Required	
10	TLX00100	Task Elements not allowed	Verify that the time reporter does not report task elements that are not available on the task template.	TLX00100	Invalid Task Value	
11	TLX00110	ACCT_CD in TL_COMM_ACCT_VW	Verify that the ACCT_CD reported in Elapsed Time exists in the TL_COMM_ACCT_VW when the TASK_PROFILE_ID is not reported, and the ACCT_CD is a required field on the task template, and the COMMIT_ACCTG_FLG on the task template is 'Y'.	TLX00110	Invalid Account Code	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
12	TLX00111	ACCT_CD in ACCT_CD_TBL	Verify that the ACCT_CD reported in Elapsed Time exists in the ACCT_CD_TBL when the TASK_PROFILE_ID is not reported, and the ACCT_CD is a required field on the task template, and the COMMIT_ACCTG_FLG on the task template is 'N'.	TLX00111	Invalid Account Code	X
13	TLX00120	BUSINESS_UNIT is Reported	Verify that the BUSINESS_UNIT reported in Elapsed Time exists in the BUS_UNIT_TBL_HR table when the TASK_PROFILE_ID is not reported and BUSINESS_UNIT is a required field on the task template.	TLX00120	Invalid HR Business Unit	X
14	TLX00130	BUSINESS_UNIT_PC	Verify that BUSINESS_UNIT_PC is not reported in Elapsed Time when PS/Projects is not installed.	TLX00130	Invalid Value for Task Templt	X
15	TLX00131	BUSINESS_UNIT_PC	Verify that the BUSINESS_UNIT_PC reported in Elapsed Time exists in the TL_BUS_CA_PC_VW when TASK_PROFILE_ID is not reported, and the COMMIT_ACCTG_FLG on task template is 'Y' and PS/Projects is installed.	TLX00131	Invalid PC Business Unit	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
16	TLX00132	BUSINESS_UNIT_PC	Verify that the BUSINESS_UNIT_PC reported in Elapsed Time exists in BUS_UNIT_PC_VW when TASK_PROFILE_ID is not reported, and the COMMIT_ACCTG_FLG on task template is 'N' and PS/Projects is installed.	TLX00132	Invalid PC Business Unit	X
17	TLX00140	BUSINESS_UNIT_PF	Verify that BUSINESS_UNIT_PF is not reported in Elapsed Time when PS/Projects is installed.	TLX00140	Invalid Business Unit PF	X
18	TLX00141	BUSINESS_UNIT_PF	Verify that the BUSINESS_UNIT_PF reported in Elapsed Time exists in the BUS_UNIT_TBL_PF table when TASK_PROFILE_ID is not reported, and PS/Projects is not installed.	TLX00141	Invalid Business Unit PF	X
19	TLX00150	COMPANY	Verify that the COMPANY reported in Elapsed Time exists in the COMPANY_TBL when TASK_PROFILE_ID is not reported.	TLX00150	Invalid Company	X
20	TLX00160	LOCATION	Verify that the LOCATION reported in Elapsed Time exists in the TL_LOCATION_VW when TASK_PROFILE_ID is not reported.	TLX00160	Invalid Location	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
21	TLX00170	JOBCODE	Verify that the JOBCODE reported in Elapsed Time exists in the TL_JOBCODE_VW when TASK_PROFILE_ID is not reported.	TLX00170	Invalid Jobcode	X
22	TLX00180	POSITION_NBR	Verify that the POSITION_NBR reported in Elapsed Time exists in the POSITION_DATA table when TASK_PROFILE_ID is not reported.	TLX00180	Invalid Position Number	X
23	TLX00190	CUSTOMER	Verify that the CUSTOMER reported in Elapsed Time exists in the TL_CUSTOMER table when TASK_PROFILE_ID is not reported.	TLX00190	Invalid Customer	X
24	TLX00200	DEPTID	Verify that the DEPTID reported in Elapsed Time exists in the TL_DEPT_TBL_VW when TASK_PROFILE_ID is not reported.	TLX00200	Invalid Department	X
25	TLX00210	PRODUCT	Verify that PRODUCT is not reported in Elapsed Time when the COMMIT_ACCTG_FLG on the task template is "Y".	TLX00210	Invalid Value for Task Templt	X
26	TLX00211	PRODUCT	Verify that the PRODUCT reported in Elapsed Time exists in the PRODUCT_TBL when TASK_PROFILE_ID is not reported and the COMMIT_ACCTG_FLG on the task template is 'N'.	TLX00211	Invalid Product	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
27	TLX00220	TASK	Verify that the TASK reported in Elapsed Time exists in the TL_TASK table when TASK_PROFILE_ID is not reported.	TLX00220	Invalid Task	X
28	TLX00230	ACTIVITY_ID	Verify that the ACTIVITY_ID reported in Elapsed Time exists in the TL_PROJ_ACTV_VW when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX00230	Invalid Activity ID	X
29	TLX00231	ACTIVITY_ID	Verify that the ACTIVITY_ID reported in Elapsed Time exists in the TL_ACTIVITY table when TASK_PROFILE_ID is not reported and both PS/Projects and PS/EPM are not installed.	TLX00231	Invalid Activity ID	X
30	TLX00232	ACTIVITY_ID	Verify that the ACTIVITY_ID reported in Elapsed Time exists in the TL_FS_ACTV_VW when TASK_PROFILE_ID is not reported, when PS/EPM is installed and PS/Projects is not installed.	TLX00232	Invalid Activity ID	X
31	TLX00240	RESOURCE_TYPE	Verify that RESOURCE_TYPE is not reported through Elapsed Time when PS/Projects is not installed.	TLX00240	Invalid Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
32	TLX00241	RESOURCE_TYPE	Verify that the RESOURCE_TYPE reported in Elapsed Time exists in TL_PROJ_RTYPE_V (this name is correct, there is no W at the end) when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX00241	Invalid Resource Type	X
33	TLX00250	PROJECT_ID	Verify that PROJECT_ID is not reported in Elapsed Time when the COMMIT_ACCTG_FLG on the Task Template is 'Y'.	TLX00250	Invalid Value for Task Templt	X
34	TLX00251	PROJECT_ID	Verify that the PROJECT_ID reported in Elapsed Time exists in the TL_PROJECT table when TASK_PROFILE_ID is not reported and the COMMIT_ACCTG_FLG on task template is 'N' and PS/Projects is not installed.	TLX00251	Invalid Project ID	X
35	TLX00253	PROJECT_ID	Verify that the PROJECT_ID reported in Elapsed Time exists in the TL_PROJ_TM_DVW when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on task template is 'N', PS/Projects is installed and ENFORCE on the PROJECT table is 'N'.	TLX00253	Invalid Project ID	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
36	TLX00254	PROJECT_ID	Verify that the PROJECT_ID reported in Elapsed Time exists in the TL_PROJ_TEAM_DVW when TASK_PROFILE_ID is not reported , COMMIT_ACCTG_FLG on task template is 'N', PS/Projects is installed and ENFORCE on the PROJECT table is 'Y'.	TLX00254	Invalid Project ID	X
37	TLX00260	RESOURCE_CATEGORY	Verify that RESOURCE_CATEGORY is not reported in Elapsed Time when TASK_PROFILE_ID is not reported in Elapsed Time and PS/Projects is not installed.	TLX00260	Invalid Value for Task Templt	X
38	TLX00261	RESOURCE_CATEGORY	Verify that the RESOURCE_CATEGORY reported in Elapsed Time exists in the TL_PROJ_CATG_V2 when TASK_PROFILE_ID is not reported, PS/Projects is installed and CATEGORY_EDIT on BUS_UNIT_TBL_PC is 'REL' indicating that Resource Category is related to Resource Type.	TLX00261	Invalid Resource Category	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
39	TLX00262	RESOURCE_CATEGORY	Verify that the RESOURCE_CATEGORY reported in Elapsed Time exists in TL_PROJ_CATG_VW when TASK_PROFILE_ID is not reported, PS/Projects is installed and CATEGORY_EDIT on BUS_UNIT_TBL_PC is 'IND' indicating that Resource Category is independent of Resource Type.	TLX00262	Invalid Resource Category	X
40	TLX00270	RESOURCE_SUB_CAT	Verify that RESOURCE_SUB_CAT is not reported in Elapsed Time when TASK_PROFILE_ID is not reported and PS/Projects is not installed.	TLX00270	Invalid Value for Task Templt	X
41	TLX00280	RESOURCE_SUB_CAT	Verify that the RESOURCE_SUB_CAT reported in Elapsed Time exists in TL_PROJ_SUB_V2 when TASK_PROFILE_ID is not reported, PS/Projects is installed and SUBCATEGORY_EDIT on BUS_UNIT_TBL_PC is 'REL' indicating that Resource Subcategory is related to Resource Category.	TLX00280	Invalid Resource Subcategory	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
42	TLX00281	RESOURCE_SUB_CAT	Verify that the RESOURCE_SUB_CAT reported in Elapsed Time exists in TL_PROJ_SUB_VW when TASK_PROFILE_ID is not reported, PS/Projects is installed and SUBCATEGORY_EDIT on BUS_UNIT_TBL_PC is 'IND' indicating that Resource Subcategory is independent of Resource Category.	TLX00281	Invalid Resource Subcategory	X
43	TLX00290	ACCT_CD is Reported	Verify that ACCT_CD is reported in Elapsed Time when TASK_PROFILE_ID is not reported and COMMIT_ACCTG_FLG on task template is 'Y'.	TLX00290	Required Value for Task Templt	X
44	TLX00300	ACTIVITY_ID	Verify that ACTIVITY_ID is reported in Elapsed Time when TASK_PROFILE_ID is not reported, PS/Projects is not installed and PS/EPM is installed.	TLX00300	Required Value for Task Templt	X
45	TLX00310	Bus Unit Rptd/Other Flds Req	Verify that BUSINESS_UNIT is reported in Elapsed Time when TASK_PROFILE_ID is not reported and DEPTID, LOCATION and JOBCODE are required fields on the task template.	TLX00310	Required Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
46	TLX00320	BUSINESS_UNIT_PC	Verify that BUSINESS_UNIT_PC is reported in Elapsed Time when TASK_PROFILE_ID is not reported, PS/Projects is installed, COMMIT_ACCTG_FLG is 'N' and PROJECT is a required field on the task template.	TLX00320	Required Value for Task Templt	X
47	TLX00330	BUSINESS_UNIT_PF	Verify that BUSINESS_UNIT_PF is not reported in Elapsed Time when COMMIT_ACCTG_FLG is 'Y' on the task template and both PS/Projects and PS/EPM are not installed.	TLX00330	Invalid Value for Task Templt	X
48	TLX00340	BUSINESS_UNIT_PF	Verify that BUSINESS_UNIT_PF is reported in Elapsed Time when TASK_PROFILE_ID is not reported, PS/Projects is not installed, COMMIT_ACCTG_FLG is 'Y', PS/EPM is installed and ACTIVITY_ID is a required field on the task template.	TLX00340	Required Value for Task Templt	X
49	TLX00350	POSITION_NBR	Verify that POSITION_NBR is not reported in Elapsed Time when POSITION_MGMT on INSTALLATION table is 'N'.	TLX00350	Invalid Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
50	TLX00360	PROJECT_ID	Verify that PROJECT_ID is reported in Elapsed Time when TASK_PROFILE_ID is not reported, both PS/Projects and PS/EPM are installed, COMMIT_ACCTG_FLG is 'N', and both BUSINESS_UNIT_PC and ACTIVITY are required fields on the task template.	TLX00360	Required Value for Task Templt	X
51	TLX00361	PROJECT_ID	Verify that PROJECT_ID is not reported in Elapsed Time when both PS/Projects and PS/EPM are installed, COMMIT_ACCTG_FLG is 'N', and both BUSINESS_UNIT_PF and ACTIVITY are required fields on the task template.	TLX00361	Invalid Value for Task Templt	X
52	TLX00362	PROJECT_ID	Verify that PROJECT_ID is reported in Elapsed Time when TASK_PROFILE_ID is not reported, PS/Projects is installed, PS/EPM is not installed, COMMIT_ACCTG_FLG is 'N' and ACTIVITY is a required field on the task template.	TLX00362	Required Value for Task Templt	X
53	TLX00370	RESOURCE_CATEGORY	Verify that RESOURCE_CATEGORY is not reported in Elapsed Time when PS/Projects is installed but PROJECT is not available on the task template.	TLX00370	Invalid Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
54	TLX00380	RESOURCE_SUB_CAT	Verify that RESOURCE_SUB_CAT is not reported in Elapsed Time when PS/Projects is installed and PROJECT is not available on task template.	TLX00380	Invalid Value for Task Templt	X
55	TLX00390	RESOURCE_TYPE	Verify that RESOURCE_TYPE is not reported in Elapsed Time when PS/Projects is installed and PROJECT is not available on the task template.	TLX00390	Invalid Value for Task Templt	X
56	TLX00400	No Tsk Elmnts with Tsk Prof	Verify that no individual Task Elements are reported through Elapsed Time when TASK_PROFILE_ID is reported.	TLX00400	Invalid entry of Task Elements	
57	TLX00410	BUS_UNIT_PC vs BUS_UNIT_PF	Verify that both BUSINESS_UNIT_PC and BUSINESS_UNIT_PF are not reported in Elapsed Time at the same time.	TLX00410	Invalid Values for Task Templt	
58	TLX00420	Valid TRC	Verify that the reported TRC exists in the TL_TRC_TBL.	TLX00420	Invalid TRC	X
59	TLX00430	Active TRC	Verify that the TRC is 'Active' as of the date reported.	TLX00430	Inactive TRC	X
60	TLX00440	TRC is in TRC Program	Verify that the TRC is in the TRC Program to which the time reporter is affiliated as of the date reported.	TLX00440	TRC is not in TRC Program	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
61	TLX00450	MIN_QTY & MAX_QTY	Verify that the TL_QUANTITY reported is within the limits specified by the MIN_QTY and the MAX_QTY on the TL_TRC_TBL.	TLX00450	Quantity exceeds TRC limits	X
62	TLX00480	COMP_RATECD	Verify that the COMP_RATECD reported is neither of 'Percent' type nor of 'Points' type.	TLX00480	Invalid Comp Rate Code Type	
63	TLX00490	Hours Type TRC & COMP_RATECD	Verify that when both Hours type TRC and COMP_RATECD are reported, the COMP_RATECD is either 'Hourly Flat Rate (HF)' type or 'Hourly Rate (HR)' type.	TLX00490	Invalid Comp Rate Code Type	X
64	TLX00500	Amount Type TRC & COMP_RATECD	Verify that when both Amount type TRC and COMP_RATECD are reported, COMP_RATECD is of 'Flat Amount (FA)' type.	TLX00500	Invalid Comp Rate Code Type	X
65	TLX00510	Units Type TRC & COMP_RATE_CD	Verify that when a Units type TRC is reported, no COMP_RATECD is reported.	TLX00510	Invalid Comp Rate Code Type	
66	TLX00520	COMP_RATECD & TRC Reported	Verify that a TRC is reported when a COMP_RATECD is reported.	TLX00520	TRC needed for Comp Rate Code	
67	TLX00530	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is a valid COMP_RATECD.	TLX00530	Invalid Comp Rate Code	
68	TLX00540	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is 'Active' as of the date reported.	TLX00540	Inactive Comp Rate Code	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
69	TLX00550	Time Reporting Status Check-P	Verify that the TIME_RPTG_STATUS of the time reporter on the TL_EMPL_DATA record, is 'Active' as of the date reported through Punch Time.	TLX00550	Inactive Time Reporter Status	
70	TLX00560	BILLABLE_IND	Verify that BILLABLE_IND reported in Elapsed Time has the value of either 'Y' or 'N'.	TLX00560	Invalid Billable Indicator	
71	TLX00570	COUNTRY	Verify that the COUNTRY reported in Elapsed Time is in the COUNTRY_TBL.	TLX00570	Invalid Country	X
72	TLX00580	COUNTRY-P	Verify that COUNTRY reported in Punch Time is in the COUNTRY_TBL.	TLX00580	Invalid Country	X
73	TLX00590	CURRENCY_CD	Verify that the CURRENCY_CD reported in Elapsed Time is in the CURRENCY_CD_TBL.	TLX00590	Invalid Currency Code	
74	TLX00600	LOCALITY	Verify that the LOCALITY reported in Elapsed Time is in the LOCAL_TAX_TBL.	TLX00600	Invalid Locality	X
75	TLX00610	LOCALITY-P	Verify that the LOCALITY reported in Punch Time is in the LOCAL_TAX_TBL.	TLX00610	Invalid Locality	X
76	TLX00620	OVERRIDE_RSN_CD	Verify that the OVERRIDE_RSN_CD reported in Elapsed Time is in the TL_OVRD_RSN_TBL.	TLX00620	Invalid Override Reason Code	
77	TLX00630	OVERRIDE_RSN_CD-P	Verify that the OVERRIDE_RSN_CD reported in Punch Time is in the TL_OVRD_RSN_TBL.	TLX00630	Invalid Override Reason Code	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
78	TLX00640	RULE_ELEMENT_1	Verify that the RULE_ELEMENT_1 reported in Elapsed Time is in the TL_RULE_ELEMENT1 table.	TLX00640	Invalid Rule Element 1	
79	TLX00650	RULE_ELEMENT_2	Verify that the RULE_ELEMENT_2 reported in Elapsed Time is in the TL_RULE_ELEMENT2 table.	TLX00650	Invalid Rule Element 2	
80	TLX00660	RULE_ELEMENT_3	Verify that the RULE_ELEMENT_3 reported in Elapsed Time is in the TL_RULE_ELEMENT3 table.	TLX00660	Invalid Rule Element 3	
81	TLX00670	RULE_ELEMENT_4	Verify that the RULE_ELEMENT_4 reported in Elapsed Time is in the TL_RULE_ELEMENT4 table.	TLX00670	Invalid Rule Element 4	
82	TLX00680	RULE_ELEMENT_5	Verify that the RULE_ELEMENT_5 reported in Elapsed Time is in the TL_RULE_ELEMENT5 table.	TLX00680	Invalid Rule Element 5	
83	TLX00690	RULE_ELEMENT_1-P	Verify that the RULE_ELEMENT_1 reported in Punch Time is in the TL_RULE_ELEMENT1 table.	TLX00690	Invalid Rule Element 1	
84	TLX00700	RULE_ELEMENT_2-P	Verify that the RULE_ELEMENT_2 reported in Punch Time is in the TL_RULE_ELEMENT2 table.	TLX00700	Invalid Rule Element 2	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
85	TLX00710	RULE_ELEMENT_3-P	Verify that the RULE_ELEMENT_3 reported in Punch Time is in the TL_RULE_ELEMENT3 table.	TLX00710	Invalid Rule Element 3	
86	TLX00720	RULE_ELEMENT_4-P	Verify that the RULE_ELEMENT_4 reported in Punch Time is in the TL_RULE_ELEMENT4 table.	TLX00720	Invalid Rule Element 4	
87	TLX00730	RULE_ELEMENT_5-P	Verify that the RULE_ELEMENT_5 reported in Punch Time is in the TL_RULE_ELEMENT5 table.	TLX00730	Invalid Rule Element 5	
88	TLX00740	STATE	Verify that the STATE reported in Elapsed Time is in the STATE_NAMES_TBL.	TLX00740	Invalid State	X
89	TLX00750	STATE-P	Verify that the STATE reported in Punch Time is in the STATE_NAMES_TBL.	TLX00750	Invalid State	X
90	TLX00800	TIMEZONE	Verify that the TIMEZONE reported in Punch Time is in the PSTIMEZONE table.	TLX00800	Invalid Time Zone	
91	TLX00810	COMMIT_ACCTG_FLAG vs. USE_DIST	Validate that the Commitment Accounting Flag on the time reporter's Default Taskgroup Assignment matches the Commitment Accounting Flag of the Department assigned in JOB, when Taskgroup is not reported.	TLX00810	Invalid Default Taskgroup	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
92	TLX00830	COMMIT_ACCTG_FLAG vs. USE_DIST	Validate that the Commitment Accounting Flag on the time reporter's borrowed Taskgroup matches the Commitment Accounting Flag of the Department assigned in JOB, when Taskgroup is reported.	TLX00830	Invalid Reported Taskgroup	X
93	TLX00840	USER_FIELD_1	Validate that the USER_FIELD_1 reported in Elapsed Time exists on the TL_USER_FIELD_1 table.	TLX00840	Invalid User Field 1	
94	TLX00850	USER_FIELD_2	Validate that the USER_FIELD_2 reported in Elapsed Time exists on the TL_USER_FIELD_2 table.	TLX00850	Invalid User Field 2	
95	TLX00860	USER_FIELD_3	Validate that the USER_FIELD_3 reported in Elapsed Time exists on the TL_USER_FIELD_3 table.	TLX00860	Invalid User Field 3	
96	TLX00870	USER_FIELD_4	Validate that the USER_FIELD_4 reported in Elapsed Time exists on the TL_USER_FIELD_4 table.	TLX00870	Invalid User Field 4	
97	TLX00880	USER_FIELD_5	Validate that the USER_FIELD_5 reported in Elapsed Time exists on the TL_USER_FIELD_5 table.	TLX00880	Invalid User Field 5	
98	TLX00890	Valid Taskgroup - P	Verify that the Taskgroup reported is in the TL_TASKGRP_TBL, as of the date reported in Punch Time.	TLX00890	Invalid Taskgroup	X
99	TLX00900	Active Taskgroup - P	Verify that the Taskgroup reported is 'Active' as of the date reported in Punch Time.	TLX00900	Inactive Taskgroup	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
100	TLX00910	Valid Task Profile ID - P	Verify that the Task Profile ID reported is in the TL_TSKPRF table as of the date reported in Punch Time.	TLX00910	Invalid Task Profile	X
101	TLX00920	Task Prof in Default Tskgrp-P	Verify that the Task Profile ID reported is in the TL_TSKGRP_PRFL table for the employee's default taskgroup as of the date reported in Punch Time.	TLX00920	Task Profile not in Taskgroup	X
102	TLX00930	Task Prof in Borrowed Tskgrp-P	Verify that the Task Profile ID reported is in the TL_TSKGRP_PRFL table for the taskgroup in to which the employee has been borrowed, as of the date reported in Punch Time.	TLX00930	Invalid Task Profile	X
103	TLX00940	All/None Req'd Task Elements-P	Verify that either all or none of the required task elements of the task template have been reported through Punch Time.	TLX00940	Task values required	
104	TLX00950	Task Elements not Allowed-P	Verify that employee does not report the task elements that are not available on the task template.	TLX00950	Invalid Task Value	
105	TLX00960	ACCT_CD in TL_COMM_ACCT_VW-P	Verify that the ACCT_CD reported in Punch Time exists in the TL_COMM_ACCT_VW when the TASK_PROFILE_ID is not reported, ACCT_CD is a required field on the task template and the COMMIT_ACCTG_FLG on the task template is 'Y'.	TLX00960	Invalid Account Code	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
106	TLX00970	ACCT_CD in ACCT_CD_TBL-P	Verify that the ACCT_CD reported in Punch Time exists in the ACCT_CD_TBL when the TASK_PROFILE_ID is not reported, ACCT_CD is a required field on the task template and COMMIT_ACCTG_FLG on the task template is 'N'.	TLX00970	Invalid Account Code	X
107	TLX00980	BUSINESS_UNIT is Reported - P	Verify that the BUSINESS_UNIT reported in Punch Time exists in the BUS_UNIT_TBL_HR when the TASK_PROFILE_ID is not reported, and BUSINESS_UNIT is a required field on the task template.	TLX00980	Invalid HR Business Unit	X
108	TLX00990	BUSINESS_UNIT_PC-P	Verify that BUSINESS_UNIT_PC is not reported in Punch Time when PS/Projects is not installed.	TLX00990	Invalid Value for Task Templt	X
109	TLX01000	BUSINESS_UNIT_PC-P	Verify that the BUSINESS_UNIT_PC reported in Punch Time exists in the TL_BUS_CA_PC_VW when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on task template is 'Y' and PS/Projects is installed.	TLX01000	Invalid PC Business Unit	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
110	TLX01010	BUSINESS_UNIT_PC-P	Verify that the BUSINESS_UNIT_PC reported in Punch Time exists in the BUS_UNIT_PC_VW when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on the task template is 'N' and PS/Projects is installed.	TLX01010	Invalid PC Business Unit	X
111	TLX01020	BUSINESS_UNIT_PF-P	Verify that BUSINESS_UNIT_PF is not reported in Punch Time when PS/Projects is installed.	TLX01020	Invalid Business Unit PF	X
112	TLX01030	BUSINESS_UNIT_PF-P	Verify that BUSINESS_UNIT_PF reported in Punch Time exists in the BUS_UNIT_TBL_PF when TASK_PROFILE_ID is not reported and PS/Projects is not installed	TLX01030	Invalid Business Unit PF	X
113	TLX01040	COMPANY-P	Verify that the COMPANY reported in Punch Time exists in the COMPANY_TBL when TASK_PROFILE_ID is not reported.	TLX01040	Invalid Company	X
114	TLX01050	LOCATION-P	Verify that the LOCATION reported in Punch Time exists in the TL_LOCATION_VW when TASK_PROFILE_ID is not reported.	TLX01050	Invalid Location	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
115	TLX01060	JOBCODE-P	Verify that the JOBCODE reported in Punch Time exists in the TL_JOBCODE_VW when TASK_PROFILE_ID is not reported.	TLX01060	Invalid Jobcode	X
116	TLX01070	POSITION_NBR-P	Verify that the POSITION_NBR reported in Punch Time exists in the POSITION_DATA table when TASK_PROFILE_ID is not reported.	TLX01070	Invalid Position Number	X
117	TLX01080	CUSTOMER-P	Verify that the CUSTOMER reported in Punch Time exists in the TL_CUSTOMER table when TASK_PROFILE_ID is not reported.	TLX01080	Invalid Customer	X
118	TLX01090	DEPTID-P	Verify that the DEPTID reported in Punch Time exists in the TL_DEPT_TBL_VW when TASK_PROFILE_ID is not reported.	TLX01090	Invalid Department	X
119	TLX01100	PRODUCT-P	Verify that PRODUCT is not reported in Punch Time when the COMMIT_ACCTG_FLG is 'Y' on the task template.	TLX01100	Invalid Value for Task Templt	X
120	TLX01110	PRODUCT-P	Verify that the PRODUCT reported in Punch Time exists in the PRODUCT_TBL when TASK_PROFILE_ID is not reported and the COMMIT_ACCTG_FLG is 'N' on the task template.	TLX01110	Invalid Product	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
121	TLX01120	TASK- P	Verify that the TASK reported in Punch Time exists in the TL_TASK table when TASK_PROFILE_ID is not reported.	TLX01120	Invalid Task	X
122	TLX01130	ACTIVITY_ID-P	Verify that the ACTIVITY_ID reported in Punch Time exists in the TL_PROJ_ACTV_VW when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX01130	Invalid Activity ID	X
123	TLX01140	ACTIVITY_ID-P	Verify that the ACTIVITY_ID reported in Punch Time exists in the TL_ACTIVITY table when TASK_PROFILE_ID is not reported, and both PS/Projects and PS/EPM are not installed.	TLX01140	Invalid Activity ID	X
124	TLX01150	ACTIVITY_ID-P	Verify that the ACTIVITY_ID reported in Punch Time exists in the TL_FS_ACTV_VW when TASK_PROFILE_ID is not reported, PS/Projects is not installed and PS/EPM is installed.	TLX01150	Invalid Activity ID	X
125	TLX01160	RESOURCE_TYP E-P	Verify that RESOURCE_TYPE is not reported through Punch Time when PS/Projects is not installed.	TLX01160	Invalid Resource Type	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
126	TLX01170	RESOURCE_TYP E-P	Verify that the RESOURCE_TYPE reported in Punch Time exists in TL_PROJ_RTYPE_V (this name is correct, there is no W at the end) when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX01170	Invalid Resource Type	X
127	TLX01180	PROJECT_ID-P	Verify that PROJECT_ID is not reported through Punch Time when COMMIT_ACCTG_FLG on the task template is 'Y'.	TLX01180	Invalid Project ID	X
128	TLX01190	PROJECT_ID-P	Verify that the PROJECT_ID reported in Punch Time exists in the TL_PROJECT table when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on the task template is 'N' and PS/Projects is not installed.	TLX01190	Invalid Project ID	X
130	TLX01210	PROJECT_ID-P	Verify that the PROJECT_ID reported in Punch Time exists in the TL_PROJ_PC_VW when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on the task template is 'N', PS/Projects is installed and ENFORCE on BUS_UNT_OPT_PC and PROJECT tables is 'N'.	TLX01210	Invalid Project ID	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
131	TLX01220	PROJECT_ID-P	Verify that the PROJECT_ID reported in Punch Time exists in the PROJ_TEAM_DVW when TASK_PROFILE_ID is not reported, the COMMIT_ACCTG_FLG on the task template is 'N', PS/Projects is installed and ENFORCE on BUS_UNT_OPT_PC is 'N' and ENFORCE on PROJECT table is 'Y'.	TLX01220	Invalid Project ID	X
132	TLX01230	RESOURCE_CATEGORY-P	Verify that RESOURCE_CATEGORY is not reported in Punch Time when TASK_PROFILE_ID is not reported and PS/Projects is not installed.	TLX01230	Invalid Resource Category	X
133	TLX01240	RESOURCE_CATEGORY-P	Verify that the RESOURCE_CATEGORY reported in Punch Time exists in the TL_PROJ_CATG_V2 when TASK_PROFILE_ID is not reported, PS/Projects is installed and CATEGORY_EDIT on BUS_UNIT_TBL_PC is 'REL' indicating that Resource Category is related to Resource Type.	TLX01240	Invalid Resource Category	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
134	TLX01250	RESOURCE_CATEGORY-P	Verify that the RESOURCE_CATEGORY reported in Punch Time exists in the TL_PROJ_CATG_VW when TASK_PROFILE_ID is not reported, PS/Projects is installed and CATEGORY_EDIT on BUS_UNIT_TBL_PC is 'IND' indicating that Resource Category is independent of Resource Type.	TLX01250	Invalid Resource Category	X
135	TLX01260	RESOURCE_SUB_CAT-P	Verify that RESOURCE_SUB_CAT is not reported in Punch Time when TASK_PROFILE_ID is not reported and PS/Projects is not installed.	TLX01260	Invalid Resource Subcategory	X
136	TLX01270	RESOURCE_SUB_CAT-P	Verify that the RESOURCE_SUB_CAT reported in Punch Time exists in TL_PROJ_SUB_V2 when TASK_PROFILE_ID is not reported, PS/Projects is installed and SUBCATEGORY_EDIT on BUS_UNIT_TBL_PC is 'REL' , indicating that Resource Subcategory is related to Resource Category.	TLX01270	Invalid Resource Subcategory	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
137	TLX01280	RESOURCE_SUB_CAT-P	Verify that RESOURCE_SUB_CAT reported in Punch Time exists in the TL_PROJ_SUB_VW when TASK_PROFILE_ID is not reported, PS/Projects is installed and SUBCATEGORY_EDIT on BUS_UNIT_TBL_PC is 'IND' indicating that Resource Subcategory is independent of Resource Category.	TLX01280	Invalid Resource Subcategory	X
138	TLX01290	ACCT_CD is Reported - P	Verify that ACCT_CD is reported in Punch Time when TASK_PROFILE_ID is not reported and the COMMIT_ACCTG_FLG on the task template is 'Y'.	TLX01290	Required Value for Task Templt	X
139	TLX01300	ACTIVITY_ID-P	Verify that ACTIVITY_ID is reported in Punch Time when TASK_PROFILE_ID is not reported, PS/Projects is not installed and PS/EPM is installed.	TLX01300	Required Value for Task Templt	X
140	TLX01310	Bus Unit Rptd/Other Flds Req-P	Verify that BUSINESS_UNIT is reported in Punch Time when TASK_PROFILE_ID is not reported and DEPTID, LOCATION and JOBCODE are required fields on the task template.	TLX01310	Required Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
141	TLX01320	BUSINESS_UNIT_PC-P	Verify that BUSINESS_UNIT_PC is reported in Punch Time when TASK_PROFILE_ID is not reported, PS/Projects is installed, COMMIT_ACCTG_FLG is 'N' and PROJECT is a required field on the task template.	TLX01320	Required Value for Task Templt	X
142	TLX01330	BUSINESS_UNIT_PF-P	Verify that BUSINESS_UNIT_PF is not reported in Punch Time when the COMMIT_ACCTG_FLG is 'Y' on the task template, and both PS/Projects and PS/EPM are not installed.	TLX01330	Invalid Value for Task Templt	X
143	TLX01340	BUSINESS_UNIT_PF-P	Verify that BUSINESS_UNIT_PF is reported in Punch Time when TASK_PROFILE_ID is not reported, PS/Projects is not installed, PS/EPM is installed, the COMMIT_ACCTG_FLG is 'Y' and ACTIVITY_ID is a required field on the task template.	TLX01340	Required Value for Task Templt	X
144	TLX01350	POSITION_NBR-P	Verify that POSITION_NBR is not reported in Punch Time when POSITION_MGMT on the INSTALLATION table is 'N'.	TLX01350	Invalid Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
145	TLX01360	PROJECT_ID-P	Verify that PROJECT_ID is reported in Punch Time when TASK_PROFILE_ID is not reported, PS/Projects is installed, PS/EPM is installed, COMMIT_ACCTG_FLG is 'N' and BUSINESS_UNIT_PC and ACTIVITY are required fields on the task template.	TLX01360	Required Value for Task Templt	X
146	TLX01370	PROJECT_ID-P	Verify that PROJECT_ID is not reported in Punch Time when PS/Projects is installed, PS/EPM is installed, COMMIT_ACCTG_FLG is 'N' and BUSINESS_UNIT_PF and ACTIVITY on required fields on the task template.	TLX01370	Invalid Value for Task Templt	X
147	TLX01380	PROJECT_ID-P	Verify that PROJECT_ID is reported in Punch Time when TASK_PROFILE_ID is not reported, PS/Projects is installed, PS/EPM is not installed, COMMIT_ACCTG_FLG is 'N' and ACTIVITY is a required field on the task template.	TLX01380	Required Value for Task Templt	X
148	TLX01390	RESOURCE_CATEGORY-P	Verify that RESOURCE_CATEGORY is not reported in Punch Time when PS/Projects is installed and PROJECT is not available on the task template.	TLX01390	Invalid Value for Task Templt	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
149	TLX01410	RESOURCE_SUB_CAT-P	Verify that RESOURCE_SUB_CAT is not reported in Punch Time when PS/Projects is installed and PROJECT is not available on task template.	TLX01410	Invalid Value for Task Templt	X
150	TLX01430	RESOURCE_TYP E-P	Verify that RESOURCE_TYPE is not reported in Punch Time when PS/Projects is installed and PROJECT is not available on the task template.	TLX01430	Invalid Value for Task Templt	X
151	TLX01450	No Tsk Elmnts With Tsk Prof-P	Verify that no individual Task Elements are reported in Punch Time when TASK_PROFILE_ID is reported.	TLX01450	Invalid entry of Task Elements	
152	TLX01460	BUS_UNIT_PC vs BUS_UNIT_PF	Verify that both BUSINESS_UNIT_PC and BUSINESS_UNIT_PF are not reported in Punch Time at the same time.	TLX01460	Invalid Values for Task Templt	X
153	TLX01470	COMMIT_ACCTG_FLG vs USE_DIST-P	Validate that the Commitment Accounting Flag on the time reporter's Default Taskgroup Assignment matches the Commitment Accounting Flag of the Department assigned in JOB, when Taskgroup is not reported.	TLX01470	Invalid Default Taskgroup	X
154	TLX01480	COMMIT_ACCTG_FLG vs USE_DIST-P	Validate that the Commitment Accounting Flag on the time reporter's borrowed Taskgroup matches the Commitment Accounting Flag of the Department assigned in JOB, when Taskgroup is reported.	TLX01480	Invalid Reported Taskgroup	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
155	TLX01490	USER_FIELD_1-P	Validate that the USER_FIELD_1 reported in Punch Time exists on the TL_USER_FIELD_1 table.	TLX01490	Invalid User Field 1	
156	TLX01500	USER_FIELD_2-P	Validate that the USER_FIELD_2 reported in Punch Time exists on the TL_USER_FIELD_2 table.	TLX01500	Invalid User Field 2	
157	TLX01510	USER_FIELD_3-P	Validate that the USER_FIELD_3 reported in Punch Time exists on the TL_USER_FIELD_3 table.	TLX01510	Invalid User Field 3	
158	TLX01520	USER_FIELD_4-P	Validate that the USER_FIELD_4 reported in Punch Time exists on the TL_USER_FIELD_4 table.	TLX01520	Invalid User Field 4	
159	TLX01530	USER_FIELD_5-P	Validate that the USER_FIELD_5 reported in Punch Time exists on the TL_USER_FIELD_5 table.	TLX01530	Invalid User Field 5	
160	TLX01540	More than 24 hours reported	More than 24 hours cannot be reported for an Hours type TRC.	TLX01540	More than 24 hours reported	X
161	TLX01550	QTY is not zero	Validate that TL_QUANTITY is zero when an Amount type TRC is reported and the COMP_RATECD reported is of 'Flat Amount' type.	TLX01550	QTY must be zero	X
162	TLX01560	QTY cannot be zero	Validate that TL_QUANTITY is not zero when an Hours/Unit type TRC is reported.	TLX01560	QTY cannot be zero	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
163	TLX01570	QTY cannot be zero	Validate that TL_QUANTITY is not zero when an Amount type TRC is reported and no COMPRATE_CD is reported.	TLX01570	QTY cannot be zero	X
164	TLX01580	QTY cannot be zero	Validate that TL_QUANTITY is not zero when an Amount type TRC is reported and COMPRATE_CD reported is not of 'Flat Amount' type.	TLX01580	QTY cannot be zero	X

Appendix B: TCD Interface

The Time Collection Device (TCD) reporting feature in PeopleSoft Time and Labor requires PeopleSoft to interface with various data collection systems.

In this document we define the interface process between PeopleSoft Time and Labor and third party data collection systems. The term 'TCD' used in this document refers to the badge-based terminal that can range from a very simple TCD to a very sophisticated data collection system.

The TCD Interface uses PeopleSoft's Publish and Subscribe communications methodology in PeopleTools to send and receive data from the TCD system. Data in PeopleSoft Time and Labor and the TCD system are synchronized by either a full data replication or an incremental approach (changes only).

The TCD Vendor Interface process is part of the Time Reporting feature of PeopleSoft Time and Labor. The TCD Vendor Interface process includes the following:

1. Identifies a generic set of input data to be sent to the various TCD systems. Each TCD vendor will determine which data elements are needed based on the customer's business requirements and the capabilities of the devices it markets and supports.
2. Identifies a generic set of output data to be produced by the various TCD systems. The TCD vendor will populate all required fields. Additionally, the TCD vendor will populate optional fields when applicable.
3. Provides TCD vendors with the following detailed information in order to successfully implement the interface process:
 - Detailed instructions to successfully implement the PeopleSoft standard EIP.
 - Detailed information to interpret the input data elements and data structures and their relationships.
 - Detailed instructions to populate the output data structures.

The frequency for passing data between the TCD system and PeopleSoft Time and Labor is determined by your business requirements. PeopleSoft and your TCD vendor will collectively determine the frequency of communications on an implementation to implementation basis.

Inputs

PeopleSoft Time and Labor interfaces with many data collection systems. Input data to be fed to the TCD system will vary from vendor to vendor. In order to accommodate as many vendors as

possible, Peoplesoft enables you to define a generic set of input data to be passed to your TCD. The TCD vendor will only use the data it needs to send to TCDs to meet the customer's time reporting needs.

PeopleSoft Time and Labor will use the definitions of TCD type to control the data going to your TCD. It does not send data your TCD cannot handle. This reduces the traffic on the network and reduces the amount of data the TCD has to ignore.

Time Reporter:

The Time Reporter data structure contains general information about the time reporter and foreign keys to related data on other data structures that follow.

#	Data Element	Type	Len	Source	Notes
	Empl ID	Char	11	TL_EMPL_DATA	Identifier.
1.	Empl RCD#	Num	3	TL_EMPL_DATA	Identifier used in PS applications to accommodate multiple concurrent jobs (positions).
2.	Badge ID	Char	20	BADGE_TABLE	Identifier.
3.	Time Reporting Status	Char	1	TL_EMPL_DATA	Active or Inactive.
4.	Last Name	Char	30	PERSONAL_DATA	Last name.
5.	First Name	Char	30	PERSONAL_DATA	First name.
6.	Hire Date	Date	10	EMPLOYMENT	Needed for calculating anniversary date.
7.	Service Date	Date	10	EMPLOYMENT	Needed for determining seniority.
8.	Birth Date	Date	10	PERSONAL_DATA	Needed for displaying a 'Happy Birthday' message.
9.	Restriction Profile ID	Char	10	TL_TCDGRP_TBL or TL_EMPL_DATA	Identifies the employee's restriction profile. Blank means there are no restrictions for the time reporter.
10.	Task Template ID	Char	10	TL_TASKGRP_TBL	Identifies the employee's task template ID.

11	Task Profile ID	Char	10	TL_EMPL_DATA	Identifies the employee's task profile.

With a few exceptions, PeopleSoft Time and Labor gets this information from the Employee Profile process and direct selects from tables. The Restriction Profile ID comes from the TCD Group unless there is an override Restriction Profile on the PeopleSoft Time and Labor Employee Data (TL_EMPL_DATA) record. The TASK_PRFL_TMPLT_ID comes from the Taskgroup table based on the employee's assigned Taskgroup in TL_EMPL_DATA.

PeopleSoft Time and Labor sends both Badge ID and Empl ID/Empl Rcd#. The TCD can use either in collecting data.

This record is sent as a full table and as incremental changes are made in PeopleSoft. For example, for setup of the TCD, a TCD would receive all the reporters for that TCD. If a reporter just got activated in PeopleSoft Time and Labor Employee Data, an incremental message is sent to all TCD's in the reporters TCD group.

The Task Template ID specified on this message is in the TCD Task Template message only if the template is valid for the TCD(s) to which this reporter can report time. **Schedule:**

The Schedule data structure contains time reporters' daily schedules.

Time reporters' daily schedule is provided to your TCD. The TCD will use this information to determine when the Time Reporter is scheduled to punch in/out for work, meals, and breaks. Based on user-defined criteria (in restriction profiles), the TCD will issue warning/error messages or prevent the user from using it.

The TCD definition will define whether or not this type of TCD can accept schedules or not. The PeopleSoft Time and Labor system does not send schedules or restriction profiles if the TCD cannot accommodate them.

#	Data Element	Type	Len	Source	Notes
	Badge ID	Char	20	TL_SCHEDULE	Identifier.
	Emplid	Char	11	TL_EMPL_DATA	Identifier.
	Empl Rcd#	Num	3	TL_EMPL_DATA	Identifier.
	Punch Date Time	Date Time	See Interface Specifications (Appendix F)	TL_SCHEDULE	Identifier.
	Sequence Number	Num	3	TL_SCHEDULE	Identifier – needed when schedule spans multiple days.

1.	Punch Type	Char	1	TL_SCHEDULE	(1 = In, 2 = Out, 3 = Meal, 4 = Break, 5 = Transfer).

Notes:

- ◆ This data structure contains multiple instances of schedules per day. If the vendor requires that there is only one schedule record per day, the vendor will need to reformat the input data before sending to TCDs.

Restriction Profile:

The Restriction Profile data structure contains customer defined restriction information. The vendor determines which restriction profiles to send to which TCDs based on the assignments of time reporters to restriction profile on the Time Reporter data structure. The vendor should be able to send all restriction profiles received from PeopleSoft Time and Labor to all TCDs.

The TCD needs restriction profiles to determine when to allow or disallow punches to occur.

The TCD definition defines whether or not this type of TCD can accept schedules or not. The PeopleSoft Time and Labor system does not send schedules or restriction profiles if the TCD cannot handle them.

#	Data Element	Type	Len	Source	Notes
	Restriction Profile ID	Char	10	TL_RESTRCTN_TBL	Identifier.
	Early In Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Early In Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Late In Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Late In Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Early Out Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Early Out Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Late Out Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Late Out Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Early Meal Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Early Meal Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Late Meal Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Late Meal Margin	Num	4	TL_RESTRCTN_TBL	Minutes.

	Early Break Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Early Break Margin	Num	4	TL_RESTRCTN_TBL	Minutes.
	Late Break Restriction Ind	Char	1	TL_RESTRCTN_TBL	Y/N.
	Late Break Margin	Num	4	TL_RESTRCTN_TBL	Minutes.

Total Hours:

The Total Hours data structure contains hours already worked for the week. Total Hours includes any overtime hours earned to date for the period. We provide the total hours by TRC for the current period for the time reporter up to the current date.

The TCD vendor uses this information to send to TCDs to be displayed when inquired by time reporters and supervisors. The TCD definition defines whether or not this type of TCD can accept hours or not.

#	Data Element	Type	Len	Source	Notes
	Badge ID	Char	20	BADGE_TABLE	Identifier.
	Empl ID	Char	11	TL_EMPL_DATA	Identifier.
	Empl RCD#	Num	3	TL_EMPL_DATA	Identifier.
	Time Reporting Code	Char	5	TL_PAYABLE_TIME	Identifier.
	Total Payable Hours	Num	12.6	TL_PAYABLE_TIME	Number.

Notes:

- ◆ Total Hours information comes from the Payable Time table.
- ◆ In order to determine total payable hours, Time Administration (Apply Rules) needs to be executed before such data can be published.

Time Reporting Code:

This data structure contains a valid list of Time Reporting Codes (TRCs) that are allowable at your TCD (such as Sick, Vacation, Holiday, Meal Allowance, etc.). This is for elapsed time reporting only.

#	Data Element	Type	Len	Source	Notes
	TCD ID	Char	10	TL_TCD_TBL	Identifies which clock gets this information.
	Time Reporting Code	Char	5	TL_TRC_TBL	Identifier.
	Description	Char	30	TL_TRC_TBL	Description.
	TRC Type	Char	1	TL_TRC_TBL	Amount, Hours, or Units
	Unit of Measure	Char	3	TL_TRC_TBL	Unit of Measure for TRC Type Units

Notes:

- ◆ The interface process only extracts TRCs with the Send To TCD field = 'Y'. The default for this field is 'N'. It is important that you set this field to 'Y' when the TRC is to be sent to the TCD. This indicator has been added to the TL_TRC_TBL to avoid sending extraneous TRCs to TCDs.
- ◆ The TCD system may need to convert character codes to numeric codes before using them.
- ◆ The data in this table is derived from the TRC Program attached to the TCD.

TCD Supervisor:

This data structure contains a list of Supervisors who are authorized to perform supervisor functions at various TCDs. Each TCD Group can be associated to one or more TCD Supervisors. A TCD Supervisor may be associated with many TCD Groups.

The TCD Interface process assigns Supervisors to TCDs. The vendor does not need to derive this relationship.

#	Data Element	Type	Len	Source	Notes
	TCD ID	Char	10	TL_TCDGPTCD_TBL	Identifies which clock gets this information.
	Supervisor ID	Char	11	TL_TCD_SUPERV	Identifier.
	Badge ID	Char	20	BADGE_TABLE	Identifier.
	Supervisor PIN #	Num	20	TL_TCD_SUPERV	PIN for supervisor.

TCD Task Profile:

This data structure contains a list of Task Profiles associated with each TCD. Task Profiles contain task and cost allocation data to be used in the labor distribution process in PeopleSoft Time and Labor. The system needs Task Profiles for positive task profile reporting. Positive task profile reporting in PeopleSoft Time and Labor means the time reporter must indicate the type of task being performed. For example, Time reporter 111111 is assigned to TCD AAAAAA. The valid Task Profiles for TCD AAAAAA include: Packaging, Shipping, Receiving, and Cleaning. Time reporter 11111 selects one of the Task Profiles by pressing a function key at the TCD to indicate the task being performed.

Unlike positive task profile reporting, default task profile reporting refers to time reporters who routinely perform the same task(s) and their cost allocation information remains unchanged. A Time Reporter simply swipes the badge as when starting and stopping work. The TCD system does not need any task information from PeopleSoft Time and Labor for these time reporters. Cost allocation data defined on the default Task Profile in PeopleSoft Time and Labor is used to allocate costs accordingly.

#	Data Element	Type	Len	Source	Notes
	TCD ID	Char	10	TL_TCD_TASKGRP	Identifier.
	Task Profile ID	Char	10	TL_TASKGRP_TBL	Identifier.
	Task Profile Description	Char	30	TL_TSKPRF_TBL	Identifier.

Notes:

The TCD Task Profile table will be derived from the following PeopleSoft Time and Labor tables:

- ◆ TCD Taskgroup – contains a list of Taskgroups associated with each TCD.
- ◆ Taskgroup Profile – contains a list of task profiles associated with each Taskgroup.
- ◆ Task Profile – contains task profile definitions. PeopleSoft Time and Labor only select records with SEND_TO_TCD = 'Y'.

TCD Task Template:

This data structure contains a list of Task Templates associated with each TCD. Task Templates are needed for positive task element reporting. Positive task element reporting requires the time reporter to enter a value for each task element on the Task Template. For example, Time reporter 111111 is assigned to TCD AAAAAA. The valid Task Templates for TCD AAAAAA include: Packaging, Shipping, Receiving, and Cleaning. The Packaging task template includes the following task elements: Customer and Account Code. Time reporter 11111 selects one of the Task Templates by pressing a function key at the TCD to indicate the task being performed. Additionally, the time reporter is required to enter the value for Customer and Account Code when prompted.

This data structure also contains a list of Rule Elements associated with each TCD. Rule Elements are needed in cases where the type of work or the job the Time Reporter performs influences the Time Reporters pay. Rule Element reporting requires the time reporter to enter a value for each Rule Element. As far as the TCD is concerned, Rule Elements are just another form of Task Elements.

This type of reporting is more complex and requires a few tables to be sent to the TCD system. If data validation is required, PeopleSoft will provide all the valid values for certain task elements.

The following tables will be sent to the TCDs for positive task element reporting:

TCD Task Template:

#	Data Element	Type	Len	Source	Notes
	TCD ID	Char	10	TL_TCD_TASKGRP_TBL	Identifier.
	Task Template ID	Char	10	TL_TASKGRP_TBL	Identifier.
	Task Template Description	Char	30	TL_TSKPRF_TMPLT	Identifier.

Notes:

The TCD Task Template table is derived from the following PeopleSoft Time and Labor tables:

- ◆ TCD Taskgroup– contains a list of Taskgroups associated with each TCD.
- ◆ Taskgroup – contains a task template ID associated with each Taskgroup.
- ◆ Task Template – contains header information for task templates.
- ◆ If template reporting is used, but the TCD vendor/customer would not like to present a list of templates to select from, a default template will be sent for each time reporter in the Time Reporter message. This default will provide the ability to automatically prompt for task elements based on the Time Reporter at the TCD.

Task Template Detail:

#	Data Element	Type	Len	Source	Notes
	Task Template ID	Char	10	TL_TSKPRF_TMPLT	Identifier.
	Task Element Code	Char	3	TL_TSKPRF_TMPLT	Identifier.
	Task Element Description	Char	30	TL_TASKELE_TBL	Description.
	Required	Char	1	TL_TSKPRF_TMPLT	Is this element required or optional.

Notes:

The Task Template Detail table contains all the valid Task Element Codes associated with each Task Template. It will be derived from the following PeopleSoft Time and Labor tables:

- ◆ Task Template Element – contains task element codes associated with a Task Template.
- ◆ Task Element – contains task element codes and associated field names.
- ◆ PSDBFIELD (PeopleTools table) – contains field names and associated descriptions.

If the time reporter has to report Rule Elements, PeopleSoft Time and Labor will add the Rule Element list to the end of each template. The Rule Element codes will be RE1, RE2, RE3, RE4 and RE5. The PeopleSoft Time and Labor system does not allow Task Element Codes with these values. The Required field is always 'Y'.

Task Element Code Value:

#	Data Element	Type	Len	Source	Notes
	Task Element Code	Char	3	TL_TASK_ELE_TBL	Identifier.
	Task Element Value	Char	25	A Prompt Table	Description.
	Task Element Value Source	Char	2	(TL/PC)	Since PROJECT values and ACTIVITY values can come from two different places, the Source field will be filled in only for those Task Element Codes.

Notes:

The Task Element Code Value table contains all the valid values associated with each Task Element Code. It will be derived from the following PeopleSoft Time and Labor tables:

- ◆ Task Template Element – contains task element codes associated with a Task Template.
- ◆ Task Element – contains task element codes and associated field names.
- ◆ PSRECFIELD (PeopleTools table) – contains record names, field names, prompt table names and other edit information. PeopleSoft Time and Labor will use rows where the record name is TL_TSK_ELMT_WRK (the name of the task derived work record)

This table also contains all the valid values associated with each Rule Element Code.

This table can be quite large. We need to ensure that the TCD system can handle such a large volume of data.

Reporting Element Tables:

Sometimes the Time Reporter has to supply information on the location for purposes of taxation. The Time Reporter or the Supervisor may also have to enter override rate information. The following tables contain valid values for this information.

Country Table:

This table is used for positive reporting of a Country other than the reporter's default.

#	Data Element	Type	Len	Source	Notes
	Country Code	Char	3	TL_COUNTRY_VW	Identifier.
	Descr	Char	30	TL_COUNTRY_VW	Description.

State Table:

This table is used for positive reporting of a State other than the reporter's default.

#	Data Element	Type	Len	Source	Notes
	State Code	Char	6	TL_STATE_VW	Identifier.
	Descr	Char	30	TL_STATE_VW	Description.

Locality Table:

This table is used for positive reporting of a Locality other than the reporter's default.

#	Data Element	Type	Len	Source	Notes
	Locality ID	Char	10	LOCAL_TAX_TBL	Identifier.
	Descr	Char	30	LOCAL_TAX_TBL	Description.

Rate Code Table:

This table is used for positive reporting of a comp rate code in conjunction with a Time Reporting Code to specify a different compensation rate. This is used for elapsed time reporting only. Either this or the override rate is entered to adjust a reporter's compensation.

#	Data Element	Type	Len	Source	Notes
	Rate Code	Char	6	COMP_RT_REG_VW	Identifier.
	Descr	Char	30	COMP_RT_REG_VW	Description.

Currency Code Table:

This table is used for positive reporting of a conjunction with a Time Reporting Code, Rate Code, or Override Rate to specify a currency different from the default. This is used for elapsed time reporting only.

#	Data Element	Type	Len	Source	Notes
	Currency Code	Char	3	CURRENCY_CD_TBL	Identifier.
	Descr	Char	30	CURRENCY_CD_TBL	Description.

Override Reason Code Table:

This table is used in conjunction with a Supervisor overriding a punch. This is used for punch time reporting only.

#	Data Element	Type	Len	Source	Notes
	Override Reason Code	Char	5	TL_OVRD_RSN_TBL	Identifier.
	Descr	Char	30	TL_OVRD_RSN_TBL	Description.

Outputs

The TCD system needs to produce the following output data to be passed to PeopleSoft Time and Labor:

#	Table	Notes
1.	Punched Time Interface	Contains punched time transactions.
2.	Punched Task Interface	Contains punched task transactions related to punched time transactions (child of Punched Time).

3.	Elapsed Time Interface	Contains elapsed time transactions (such as Sick, Vacation, Holiday, etc.).
4.	Elapsed Task Interface	Contains elapsed task transactions related to elapsed time transactions (child of Elapsed Time).

The PeopleSoft Time and Labor system receives this data through the Publish/Subscribe mechanism. The first step is to validate the information sent by the TCD. This includes standard format edits.

This data may also come into PeopleSoft Time and Labor via a flat file.

The next step is to translate Badge IDs to Emplids and create Reported Time entries.

The last step is to initiate the Validation process, which takes the data to the next step.

Since a Time Reporter can report time at more than one TCD, PeopleSoft Time and Labor has to be able to accept data for a Time Reporter from multiple sources at the same time.

Punched Time Interface:

The Punched Time data structure contains punched time transactions. The majority of time transactions will be written to this data structure.

#	Data Element	Type	Len	Required	Notes
	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Punch Date Time	Date Time	See Interface Specifications in Using Time Collection Devices	N	Identifier. This field is required if the Add/Delete indicator is "A".
	Delete Date	Date	10	N	Indicates the Date for an Add/Delete indication of "D". This field is required if the Add/Delete indicator is "D".
	Punch Type	Char	1	N	1 = In, 2 = Out, 3 = Meal, 4 = Break, 5 = Transfer. This field is required if the

					Add/Delete indicator is "A".
	TCD ID	Char	10	Y	Indicates which TCD time transaction came from.
	Time Zone	Char	9	N	EST, PST, MST, etc. (see end of Appendix E for complete list of valid values)
	Supervisor ID	Char	20	N	Can be blank – Supervisor ID who did the override.
	User ID	Char	8	N	Can be blank – User ID who did the override.
	Override Reason Code	Char	5	N	Can be blank – Reason code for the override.
	Add/Delete Indicator	Char	1	N	Can be blank – A = Add, D = Delete
	Action Date/Time	Date Time	See Interface Specifications in Using Time Collection Devices	N	Can be blank – Date and Time when override occurred.
	Task Profile ID	Char	10	N	Can be blank – override or positively reported.
	Task Template ID	Char	10	N	Can be blank – Task Template used when positively reported.
	Country	Char	3	N	Override Country
	State	Char	6	N	Override State
	Locality	Char	10	N	Override Locality
	Comments	Char	254	N	

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. PeopleSoft Time and Labor translates Badge IDs to Emplids.

PeopleSoft Time and Labor gets the time zone from the TCD definition if the time zone does not come in on this record.

PeopleSoft Time and Labor compares the Task Template ID on the Punched Time record to the Task Template ID on the Time Reporter's Taskgroup. If the Task Template IDs do not match, then the PeopleSoft Time and Labor system assumes Taskgroup borrowing has occurred and will find a Taskgroup that contains the Task Template ID.

PeopleSoft Time and Labor compares the Task Profile ID on the Punched Time record to the Task Profile IDs attached to the Time Reporter's Taskgroup. If the Task Profile IDs do not match, then the PeopleSoft Time and Labor system assumes Taskgroup borrowing has occurred and will find a Taskgroup that contains the Task Profile ID.

PeopleSoft Time and Labor creates an Audit record if the Supervisor ID on the record is not blank. The audit record will have a generic "Override at TCD" reason.

For Country, State and Locality, the PeopleSoft Time and Labor System uses the values on the interface if present. If not present, PeopleSoft Time and Labor checks the TCD definition to see if these values are specified at the TCD. If they are, PeopleSoft Time and Labor will use the TCD definition values. In either case, PeopleSoft Time and Labor compares these values to the Time Reporter's values in HR. PeopleSoft Time and Labor will use these values as overrides on Reported Time if there is a difference.

In general, PeopleSoft recommends that the deletion and replacement of punches be done on-line in the PeopleSoft Time and Labor system. However, the Add/Delete Indicator in the Punch Interface provides delete/replace functionality on the day level for an employee. Individual punches cannot be deleted through the interface, and a replacement would simply be a delete of a day and then an add of what the day should really look like. For this to happen, the TCD needs to maintain an image of that day, so corrected punches could be sent with the whole day. When a delete is processed in the PeopleSoft system, punch date times are evaluated in the time zone in which they were reported. Here is an example of deleting a punch.

Employee 1 has the following punches on 1/1/99, and these punches have already been sent to PeopleSoft Time and Labor:

EMPLID	PUNCH_DATETIME	PUNCH_TYPE	Add/Delete Indicator
1	1/1/99 8AM	IN	A
1	1/1/99 12PM	MEAL	A
1	1/1/99 1PM	IN	A
1	1/1/99 5PM	OUT	A

Someone at the TCD decides that the 12PM *MEAL* punch and 1PM *IN* punch need to be deleted because the employee didn't take lunch.

These are the rows PeopleSoft should receive in the interface (the time on a deleted row is irrelevant):

EMPLID	PUNCH_DATETIME	DELETE_DATE	PUNCH_TYPE	Add/Delete Indicator
1		1/1/99		D

1	1/1/99 8AM		IN	A
1	1/1/99 5PM		OUT	A

Here is an example of replacing a punch.

Employee 2 has the following punches on 1/1/99, and these punches have already been sent to PeopleSoft Time and Labor:

EMPLID	PUNCH_DATETIME	PUNCH_TYPE	Add/Delete Indicator
2	1/1/99 8 AM	IN	A
2	1/1/99 12 PM	MEAL	A
2	1/1/99 1 PM	IN	A
2	1/1/99 5 PM	OUT	A

Someone at the TCD decides that the 1PM *IN* punch should be a 2PM *IN* punch because Employee 2 really took a two hour lunch.

These are the new rows PeopleSoft should receive in the interface:

EMPLID	PUNCH_DATETIME	DELETE_DATE	PUNCH_TYPE	Add/Delete Indicator
2		1/1/99		D
2	1/1/99 8AM		IN	A
2	1/1/99 12PM		MEAL	A
2	1/1/99 2PM		IN	A
2	1/1/99 5PM		OUT	A

Punched Task Interface:

The Punched Task data structure contains punched task transactions related to a punched time transaction.

_#	Data Element	Type	Len	Required	Notes
	Badge ID	Char	20	N	The TCD must send

					either Badge ID or Empl Id/Empl Rcd#.
	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Punch Date Time	Date Time	See interface specifications in Using Time Collection Devices	Y	Identifier.
	Delete Date	Date	10	N	Always is Null
	Task Element Code	Char	3	Y	Only for positive task element reporters.
	Task Element Value	Char	25	Y	Only for positive task element reporters.

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. PeopleSoft Time and Labor translates Badge IDs to Emplids.

The TCD will also pass Rule Elements on this table. Rule Elements will look just like task elements. The PeopleSoft Time and Labor system will tell the difference by the element code and split out rule elements into specific fields on the reported time record.

Mapping of task element codes may need to occur if the TCD can only handle numeric values.

Only punch types of *IN* and *Transfer* should produce Punched Task records.

Elapsed Time Interface:

The Elapsed Time data structure contains elapsed time transactions reported at the TCDs (such as tip, vacation, sick, holiday, etc.):

#	Data Element	Type	Len	Required	Notes
	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.

	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Date Under Report	Date	10	N	Identifier (CCYY-MM-DD). This field is required if the Add/Delete indicator is "A".
	Sequence Number	Num	3	Y	Identifier to make each row unique.
	Delete Date	Date	10	N	Indicates the Date for an Add/Delete indication of "D". This field is required if the Add/Delete indicator is "D".
	Add/Delete Indicator	Char	1	Y	A/D, Default = A.
	TCD ID	Char	10	Y	Indicates which TCD time transaction came from.
	Time Reporting Code	Char	5	Y	TCD vendors may need to convert numeric code to character code.
	Quantity	Num	12.6	Y	This field can represent hours (in hours and tenths), amount, or units.
	Currency Code	Char	3	N	An optional currency code for when the quantity represents money.
	Pay Rate Override	Num	12.6	N	Can be zero. If populated, it will be used to calculate time reporter's pay.
	Rate Code Override	Char	6	N	Override Rate Code
	Billable Indicator	Char	1	Y	Billable Indicator for use in pay calculations (Y/N) Default=N.
	Supervisor ID	Char	20	N	Can be blank – Supervisor ID who did the override.
	User ID	Char	8	N	Can be blank – User ID who did the override.
	Override Reason Code	Char	5	N	Can be blank – Reason code for the override.
	Action Date/Time	Date	See interface	N	Can be blank – Date and Time when override

		Time	specific at-ions in Using Time Collecti on Devices		occurred.
	Task Profile ID	Char	10	N	Can be blank – override or positively reported.
	Task Template ID	Char	10	N	Can be blank – Task Template used when positively reported.
	Country	Char	3	N	Override Country
	State	Char	6	N	Override State
	Locality	Char	10	N	Override Locality
	Comments	Char	254	N	

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. PeopleSoft Time and Labor translates Badge IDs to Emplids.

PeopleSoft Time and Labor assumes the currency code attached to the Time Reporting Code definition unless a currency code comes in on this record.

The PeopleSoft Time and Labor system compares the Task Template ID on the Elapsed Time record to the Task Template ID on the Time Reporters Taskgroup. If the Task Template IDs do not match, then PeopleSoft Time and Labor assumes Taskgroup borrowing has occurred and will find a Taskgroup that contains the Task Template ID.

The PeopleSoft Time and Labor system compares the Task Profile ID on the Elapsed Time record to the Task Profile IDs attached to the Time Reporters Taskgroup. If the Task Profile IDs do not match, then PeopleSoft Time and Labor assumes Taskgroup borrowing has occurred and will find a Taskgroup that contains the Task Profile ID.

The PeopleSoft Time and Labor system creates an Audit record if the Supervisor ID on the record is not blank. The audit record will have a generic “Override at TCD” reason.

For Country, State and Locality, the PeopleSoft Time and Labor System uses the values on the interface if present. If not present, PeopleSoft Time and Labor will check the TCD definition to see if these values are specified at the TCD. If they are, PeopleSoft Time and Labor will use the TCD definition values. In either case, PeopleSoft Time and Labor will compare these values to the Time Reporter’s values in HR. PeopleSoft Time and Labor will use these values as overrides on Reported Time if there is a difference.

In general, PeopleSoft recommends that the deletion and replacement of elapsed time records be done on-line in the PeopleSoft Time and Labor system. However, the Add/Delete Indicator in the

Elapsed Time Interface provides delete/replace functionality on the day level for an employee. Individual elapsed time records cannot be deleted through the interface. A replacement would simply be a delete and then an add of what the day should really look like. For this to happen, the TCD needs to maintain an image of that day, so corrected elapsed time records could be sent with the whole day.

Here is an example of deleting an elapsed time record.

Employee 1 has reported the following time on 1/1/99, and these records have already been sent to PeopleSoft Time and Labor:

EMPLID	DUR	SEQNUM	TRC	TL Quantity	Add/Delete Indicator
1	1/1/99	1	REG	8	A
1	1/1/99	2	OT	2	A

Someone at the TCD decides that the OT record was mistakenly reported and should be deleted.

These are the rows PeopleSoft should receive in the interface:

EMPLID	DUR	SEQNUM	DELETE_DATE	TRC	TL Quantity	Add/Delete Indicator
1			1/1/99			D
1	1/1/99	1		REG	8	A

Here is an example of replacing an elapsed time record.

Employee 2 has reported the following time on 1/1/99, and these records have already been sent to PeopleSoft Time and Labor:

EMPLID	DUR	SEQNUM	TRC	TL Quantity	Add/Delete Indicator
2	1/1/99	1	REG	8	A
2	1/1/99	2	OT	2	A

Someone at the TCD decides 3 hours of OT were worked instead of the 2 that were reported.

These are the rows PeopleSoft should receive in the interface:

EMPLID	DUR	SEQNUM	DELETE_ DATE	TRC	TL Quantity	Add/Delete Indicator
2			1/1/99			D
2	1/1/99	1		REG	8	A
2	1/1/99	2		OT	3	A

Elapsed Task Interface:

The Elapsed Task data structure contains elapsed task transactions related to each elapsed time transaction.

#	Data Element	Type	Len	Required	Notes
	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl Id/Empl Rcd#.
	Date Under Report	Date	10	Y	Identifier (CCYY-MM-DD)
	Sequence Number	Num	3	Y	Identifier to make each row unique.
	Delete Date	Date	10	N	Always is Null
	Task Element Code	Char	3	Y	Only for positive task element reporters.
	Task Element Value	Char	25	Y	Only for positive task element reporters.

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. PeopleSoft Time and Labor translates Badge IDs to Emplids.

The TCD will also pass Rule Elements on this table. Rule Elements will look just like task elements. The PeopleSoft Time and Labor system will tell the difference by the element code and split out rule elements into specific fields on the Recorded Time record.

Mapping of task element codes may need to occur if the TCD can only use numbers.

Reports:

Report counts of the various objects attached to the TCD includes counts of Time Reporters, TCD Restriction Profiles, Task Profiles, Task Templates, Task Elements, Task Element Values, Time

Reporting Codes, Supervisors, Rule Elements, and Rule Element values. You use this report to monitor memory usage at the TCD.

Objects being received by the TCD:

1. Time Reporter

Message Name: TIME_DEVICE_EMPL_ATT_FULLSYNC (initialization/full table messaging)

TIME_DEVICE_EMPL_ATT_SYNC (updates/incremental messaging)

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_EMPL_DTA_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	EMPLID	Empl ID	Char	11
1.	EMPL_RCD	Empl RCD#	Num	3
2.	BADGE_ID	Badge ID	Char	20
3.	TIME_RPTG_STATUS	Time Reporting Status	Char	1
4.	LAST_NAME	Last Name	Char	30
5.	FIRST_NAME	First Name	Char	30
6.	HIRE_DT	Hire Date	Date	10
7.	SERVICE_DT	Service Date	Date	10
8.	BIRTHDATE	Birth Date	Date	10
9.	RESTRICTION_PRFL_ID	Restriction Profile ID	Char	10
10.	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
11.	TASK_PROFILE_ID	Task Profile ID	Char	10

2. Schedule

Message Name: TIME_DEVICE_SCHEDULE_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_SCHEDULE_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	BADGE_ID	Badge ID	Char	20
	EMPLID	Employee ID	Char	11
	EMPL_RCD	Employee Record Num	Num	3
	PUNCH_DTTM	Punch Date Time	DateTime	See interface specifications in Using Time Collection Devices
	SEQNUM	Sequence Number	Num	3
1.	PUNCH_TYPE	Punch Type	Char	2

3. Restriction Profile

Message Name: TIME_DEVICE_RESTRICT_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_RESTRICT_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15

	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	RESTRICTION_PRF_ID	Restriction Profile ID	Char	10
	RES_EARLY_IN	Early In Restriction Ind	Char	1
	EARLY_IN_PUNCH	Early In Margin	Num	4
	RES_LATE_IN	Late In Restriction Ind	Char	1
	LATE_IN_PUNCH	Late In Margin	Num	4
	RES_EARLY_OUT	Early Out Restriction Ind	Char	1
	EARLY_OUT_PUNCH	Early Out Margin	Num	4
	RES_LATE_OUT	Late Out Restriction Ind	Char	1
	LATE_OUT_PUNCH	Late Out Margin	Num	4
	RES_EARLY_MEAL	Early Meal Restriction Ind	Char	1
	EARLY_MEAL	Early Meal Margin	Num	4
	RES_LATE_MEAL	Late Meal Restriction Ind	Char	1
	LATE_MEAL	Late Meal Margin	Num	4
	RES_EARLY_BREAK	Early Break Restriction Ind	Char	1
	EARLY_BREAK	Early Break Margin	Num	4
	RES_LATE_BREAK	Late Break Restriction Ind	Char	1
	LATE_BREAK	Late Break Margin	Num	4

4. Total Hours

Message Name: TIME_DEVICE_PER_HRS_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TOT_HRS_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	BADGE_ID	Badge ID	Char	20
	EMPLID	Employee ID	Char	11
	EMPL_RCD	Employee Record Num	Num	3
	TRC	Time Reporting Code	Char	5
	TL_QUANTITY	Total Payable Hours	Num	12.6

5. Time Reporting Code

Message Name: TIME_DEVICE_RPTG_CODE_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TRC_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TRC	Time Reporting Code	Char	5
	DESCR	Description	Char	30

6. TCD Supervisor

Message Name: TIME_DEVICE_SUPERVISOR_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TCDSETUP_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TCD_SUPERVISR_ID	Supervisor ID	Char	20
	BADGE_ID	Badge ID	Char	20
	SUPERVISR_PIN_NUM	Supervisor PIN #	Num	20

7. TCD Task Profile

Message Name: TIME_DEVICE_PROFILES_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TSK_PROF_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TASK_PROFILE_ID	Task Profile ID	Char	10
	DESCR	Task Profile Description	Char	30

8. TCD Task Template

Message Name: TIME_DEVICE_TEMPLATES_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TSK_TEMP_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
	DESCR	Task Template Description	Char	30

1. Task Template Detail (sent in TIME_DEVICE_TEMPLATES_FULLSYNC message as a child)

Record Definition

Record Name: TL_TEMP_DTL_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
	TASK_ELEMENT_CD	Task Element Code	Char	3
	DESCR	Task Element Description	Char	30
	CODE_REQUIRED	Required(Y/N)	Char	1

2. Task Element Code Value

Message Name: TIME_DEVICE_TASK_VALS_FULLSYNC

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_CD_VALS_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	TASK_ELEMENT_CD	Task Element Code	Char	3
	TASK_ELEMENT_VALUE	Task Element Value	Char	25
	VALUE_SOURCE	Value Source(populated only for Codes PRJ and ACT)	Char	2

9. Reporting Elements Table

Message Name: TIME_DEVICE_RPT_ELMNT_FULLSYNC (all reporting element tables are combined into one message definition)

Message Channel Name: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_RPTG_ELE_MSG

#	Data Element	Description	Type	Len
	MSGNODENAME	Message Node Name	Char	15
	TCD_ID	TCD ID	Char	10
	TCD_NETWORK_ID	TCD NetworkID	Char	20
	TCD_NODE_ID	TCD Node ID	Char	20
	RPTG_ELE_IND	Reporting Element Indicator -- See possible values below	Char	2

	RPTG_ELE_CODE	Reporting Element Codes	Char	10
	DESCR	Description	Char	30

Mapping for RPTG_ELE_IND

- CO – Country
- ST – State
- LY – Locality
- SH – Shift
- RT – Rate Code
- CC – Currency Code
- OV – Override Reason Code

Objects being sent from the TCD:

1. Punched Time Interface

Message Name: PUNCHED_TIME_ADD

Message Channel Name: PUNCHED_TIME

Record Definition

Record Name: TL_PUNCH_INTFC

#	Data Element	Description	Type	Len
	BADGE_ID	Badge ID	Char	20
	EMPLID	Empl ID	Char	11
	EMPL_RCD	Empl RCD#	Num	3
	PUNCH_DTTM	Punch Date Time	DateTime	See Interface Specifications in Using Time Collection Devices
	DELETE_DATE	Delete Date	Date	10

	PUNCH_TYPE	Punch Type	Char	1
	TCD_ID	TCD ID	Char	10
	TIMEZONE	Time Zone	Char	9
	TCD_SUPERVISR_ID	Supervisor ID	Char	11
	OPRID	User ID	Char	8
	OVERRIDE_RSN_CD	Override Reason Code	Char	5
	ADD_DELETE_IND	Add/Delete Indicator	Char	1
	ACTION_DTTM	Action Date/Time	DateTime	See Interface Specifications in Using Time Collection Devices
	TASK_PROFILE_ID	Task Profile ID	Char	10
	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
	COUNTRY	Country	Char	3
	STATE	State	Char	6
	LOCALITY	Locality	Char	10
	TL_COMMENTS	Comments	Char	254
	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

2. Punched Task Interface (sent in PUNCHED_TIME_ADD message as a child record)

Record Definition

Record Name: TL_PCHTSK_INTFC

#	Data Element	Description	Type	Len
	BADGE_ID	Badge ID	Char	20
	EMPLID	Empl ID	Char	11
	EMPL_RCD	Empl RCD#	Num	3
	PUNCH_DTTM	Punch Date Time	DateTime	26

	DELETE_DATE	Delete Date	Date	10
	TASK_ELEMENT_CD	Task Element Code	Char	3
	TASK_ELEMENT_VALUE	Task Element Value	Char	30
	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

3. Elapsed Time Interface

Message Name: ELAPSED_TIME_ADD

Message Channel Name: ELAPSED_TIME

Record Definition

Record Name: TL_ELP_INTFC

#	Data Element	Description	Type	Len
	BADGE_ID	Badge ID	Char	20
	EMPLID	Empl ID	Char	11
	EMPL_RCD	Empl RCD#	Num	3
	DUR	Date Under Report	Date	10 (CCYY-MM-DD)
	SEQNUM	Sequence Number	Num	3
	DELETE_DATE	Delete Date	Date	10
	ADD_DELETE_IND	Add/Delete Indicator	Char	1
	TCD_ID	TCD ID	Char	10
	TRC	Time Reporting Code	Char	5
	TL_QUANTITY	Quantity	Num	12.6
	CURRENCY_CD	Currency Code	Char	3
	OVERRIDE_RATE	Pay Rate Override	Num	12.6
	COMPRATE_CD	Rate Code Override	Char	6

	BILLABLE_IND	Billable Indicator	Char	1
	TCD_SUPERVISR_ID	Supervisor ID	Char	20
	OPRID	User ID	Char	8
	OVERRIDE_RSN_CD	Override Reason Code	Char	5
	ACTION_DTTM	Action Date/Time	Date Time	26
	TASK_PROFILE_ID	Task Profile ID	Char	10
	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
	COUNTRY	Country	Char	3
	STATE	State	Char	6
	LOCALITY	Locality	Char	10
	TL_COMMENTS	Comments	Char	254
	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

4. Elapsed Task Interface (sent in ELAPSED_TIME_ADD message as a child record)

Record Definition

Record Name: TL_ELPTSK_INTFC

#	Data Element	Description	Type	Len
	BADGE_ID	Badge ID	Char	20
	EMPLID	Empl ID	Char	11
	EMPL_RCD	Empl RCD#	Num	3
	DUR	Date Under Report	Date	10 (CCYY-MM-DD)
	SEQNUM	Sequence Number	Num	3
	DELETE_DATE	Delete Date	Date	10

	TASK_ELEMENT_CD	Task Element Code	Char	3
	TASK_ELEMENT_VALUE	Task Element Value	Char	30
	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

Task Element Code Mapping

Task Element Code	Description
ACT	Activity ID
ANT	Account Code
BUH	Business Unit HR (Human Resources)
BUM	Business Unit PF (Performance Measurement)
BUF	PC Business Unit (Project Costing)
COM	Company
CST	Customer
DPT	Department ID
JOB	Jobcode
LOC	Location
POS	Position Number
PRD	Product
PRJ	Project ID
RE1	Rule Element 1
RE2	Rule Element 2
RE3	Rule Element 3
RE4	Rule Element 4

RE5	Rule Element 5
REC	Resource Category
RES	Resource SubCategory
RET	Resource Type
TSK	Task
UF1	User Field 1
UF2	User Field 2
UF3	User Field 3
UF4	User Field 4
UF5	User Field 5

List of Valid Time Zones

Value	Description
ACST	AUS Central Time, Darwin
AFST	Afghanistan Time, Kabul
ARST	Arabian Time, Abu Dhabi, Muscat
AST	Atlantic Time (Canada)
AZST	Azores Time, Cape Verde Is.
BST	Bangkok Time, Hanoi, Jakarta
CASST	Central Asia Time, Almaty, Dhaka
CAUST	Central Australia, Adelaide
CHST	China Time, Beijing, Hong Kong
CPST	Central Pacific, Magadan, Solomon Is.
CST	Central Time
CSTST	Central Time no Daylight Savings
DST	Dateline Time, Eniwetok, Kwajalein
EAUST	East Australia Time, Brisbane, Guam
EEST	East Europe Time, Bucharest

EGST	Egypt Time, Cairo
EKST	Ekaterinburg Time
ESAST	East South America Time
EST	Eastern Time
ESTST	Eastern Time no Daylight Savings, Indiana
FLEST	FLE Time, Helsinki, Riga
FST	Fiji Time, Kamchatka, Marshall Is.
GFTST	GFT Time, Athens, Istanbul, Minsk
GMT	GMT, London, Dublin, Lisbon, Edinburgh
GMTST	GMT Standard Time, Casablanca
HST	Hawaiian Time
IRST	Iran Time, Tehran
IST	India Time, Bombay, Calcutta, New Delhi
KST	Korea Time, Seoul
MAST	Mid-Atlantic Time
MST	Mountain Time
MSTST	Mountain Time no Daylight Savings, Arizona
MXST	Mexico Time, Mexico City, Tegucigalpa
NST	Newfoundland Time
NZST	New Zealand Time, Auckland, Wellington
PST	Pacific Time, Tijuana
RST	Russian Time, Moscow, St. Petersburg, Volgograd
SAEST	SA Eastern Time, Buenos Aires, Georgetown
SAFST	South Africa Time, Israel
SAPST	SA Pacific Time, Bogota, Lima, Quito
SAST	Saudi Arabia Time, Baghdad, Kuwait, Riyadh
SAWST	SA Western Time, Caracas, La Paz
SGST	Singapore Time

SLST	Sri Lanka Time, Colombo
SMST	Samoa Time, Midway Island
SST	Sydney Time, Canberra, Melbourne
TAST	Tasmania Time, Hobart
TPST	Taipei Time
TST	Tokyo Time
VST	Vladivostok Time
WASST	West Asia Time, Islamabad, Karachi, Tashkent
WAUST	West Australia Time, Perth
WEST	West Europe Time, Berlin, Rome, Paris
YST	Yakutsk Time

CHAPTER 22

Appendix C: Referential Integrity

The following table contains a list of the situations when Referential Integrity is triggered and will be processed through Time Administration.

Referential Integrity Triggers

<i>Page</i>	<i>Prompt on Page</i>	<i>System Action</i>	<i>Validation ID</i>	<i>Trigger TA?</i>
Create/Maintain Time Reporter Data	Workgroup	Update	TLX00440	Y
	Taskgroup	Update	TLX00070	Y
			TLX00090	
			TLX00100	
	Task Profile	Update	TLX00070	Y
	Rule Element 1-5	Update	None	Y
Comp Plan Enrollment	Compensatory Time Off Plan	Add/Del/Update	TLX00001	Y
Time Reporting Code	TRC Type – Changed to Hours	Update	TLX00490	Y
	TRC Type – Changed to Amount	Update	TLX00500	Y
	TRC Type – Changed to Units	Update	TLX00510	Y
	Maximum Quantity	Update	TLX00450	Y
	Minimum Quantity	Update	TLX00450	Y
	Flat Amount	Update	TLX00460	Y
	Rate	Update	TLX00470	Y

Page	Prompt on Page	System Action	Validation ID	Trigger TA?
	Effect on Comp/Leave	Update when indicator is changed from None to Comp Earned or Comp Taken	TLX00001	Y
		Update when indicator is changed from None to Leave Taken	TLX0010	Y
TRC Program	Time Reporting Code	Add/Delete	TLX00440	Y
Workgroup	TRC Program ID	Update	TLX00440	Y
	Rule Program ID	Update	None	Y
	Comp Time Plan	Update	TLX00001	Y
	Holiday Schedule	Update	None	Y
	Schedule ID	Update	None	Y
	Needs Approval	Update	None	Y
	Day Breaker	Update	None	Y
	Day Breaker Range	Update	None	Y
	Day Breaker Options	Update	None	Y
	Round Punches Before Rules	Update	None	Y
	Rounding Intervals (Mins)	Update	None	Y
	Rounding Marker (Mins)	Update	None	Y
	Round Duration After Rules	Update	None	Y
	Rounding Options (Day, None, Segment)	Update	None	Y
Task Profile	Task Profile ID	Add/Update	TLX00060	Y
Taskgroup	Taskgroup	Add	TLX00040	Y

Page	Prompt on Page	System Action	Validation ID	Trigger TA?
	Task Template	Update	TLX00090	Y
			TLX00100	
	Default Task Profile ID	Update	None	Y
Taskgroup (Profile)	Task Profile ID	Inactivate	TLX00070	Y
			TLX00080	
		Add	TLX00070	Y
			TLX00080	
Build Time Period Calendar	Time Period ID	Update	None	Y
Rule Program	Priority	Update	None	Y
	Rule ID	Update	None	Y
Compensatory Time Off Plan	Expiration Period	Update	TLX00001	Y
	Number	Update	TLX00001	Y
	Maximum Negative Hours Allowed	Update	TLX00001	Y
	Maximum Positive Hours Allowed	Update	TLX00001	Y
Compensatory Time Off Plan (TRC)	Time Reporting Code	Add/Delete	TLX00001	Y
Build Schedule Calendar	Schedule ID	Add/Update	None	Y
Assign Work Schedule	Schedule ID	Update	None	Y
Override Scheduled Workday	Workday	Add/Update	None	Y
Job Data	All Fields	Add/Update	TLX00810	Y
			TLX00830	
Department	Use Actuals Distribution	Update	TLX00810	Y

Page	Prompt on Page	System Action	Validation ID	Trigger TA?
			TLX00830	
Leave Plan Table	Maximum Negative Hours Allowed	Update	TLX00010	Y
	Accrued Balance Goes Negative	Update	TLX00010	Y
Leave Plans (USA)	Benefit Plan	Add/Update	TLX00010	Y
	Plan Type	Update	TLX00010	Y
	Coverage Election	Update	TLX00010	Y

Using Self Service Components

PeopleSoft Time and Labor Self Service components consist of transactions that provide your managers and employees with convenient access to information by using a browser. Access to information by managers and all employees are flexible, convenient, and easy. For many people, these transactions provide an improved alternative to automated telephone prompting systems. They can also help ease the workload for internal support staff and customer service representatives.

You can use PeopleTools Application Designer to modify and configure the Self Service internet pages, just as you would any application page.



For more information, see PeopleSoft Application Designer in your *PeopleSoft PeopleTools* PeopleBook.

Self Service Components

The Self Service components enable employees and managers to review, add, update, and delete (where appropriate) their time and labor information.

- **Time and Labor Launch Pad:** This enables the employee or the manager to view information regarding reported and scheduled time for a month at a time. It also enables them to navigate to self-service transaction pages.
- **Work Schedule:** This enables the manager to view employees' work schedules or enables employees to view their own schedules.
- **Override Scheduled Workday:** This enables the manager to make an ad hoc change to an employee's schedule at the day level.
- **Weekly Punch Time:** This enables the employee or the manager to report new punch time, or view or change existing time.
- **Weekly Elapsed Time:** This enables the employee or the manager to report new elapsed time, or view or change existing time.
- **Mass Time Reporting:** This enables the employee or the manager to report time in several ways. They can report time according to their (or their employee's) schedule for a specified date or date range. They can also specify a lump sum amount to be distributed according to their schedule. For example, they can have 40 hours distributed over a week's schedule. Or,

they can specify multiple transactions to be applied to a specified date or range of dates. For example, they can report 6 hours of regular time and two hours of paid time off from 7 March through 20 March.

- **Compensatory Time Balance:** This enables the employee or the manager to view compensatory time balance and compensatory time expiration information.
- **Payable Time Summary:** This enables the employee or the manager to view payable time that has been calculated by the system from a schedule or reported time.
- **Payable Time Details:** This enables the employee or the manager to view details about the payable time.
- **Forecasted Time Summary:** This enables the employee or the manager to view a forecasted summary of the payable time for a future or current period. This payable time is calculated based on the employee's schedule or time reported for a specified date.
- **Forecasted Time Detail:** This enables the employee or the manager to view details about the forecasted payable time.

Understanding Roles

The Self Service components can be used by both the employee and the manager. We deliver definitions for these roles and define a menu for each role.



In the Self Service Component section of the PeopleSoft Time and Labor PeopleBook, we use the term *employee* to refer to all people who work for, and report time at your organization. This can include regular employees as well as contractors, and other temporary assignment workers.

Understanding Security

The user profile that you create for each individual who accesses the Self Service components determines the internet pages the user can have access to by default. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile, which is linked to access control lists. Each access control list identifies pages that individuals can access. To modify the access for specific Internet pages for each role, you modify the access control list for the user's role. You also define which data the user has access to in the user profile.

Both the Time and Labor Launch Pad and the Mass Time Reporting pages display a list of employees to choose from. The following determines which employees the manager has access to:

1. Determine the Row Security Permission List assigned to your User ID on the General Tab of your User Profile in Maintain Security.

2. If you use group security in Time and Labor, this Row Security Permission List should be associated with dynamic and/or static groups that you have created.
3. If you decide to not use group security and do not have groups assigned to your Row Security Permission List, the default is the use of departmental security. Departmental Security will be derived by determining the Department ID that you are in and then seeing who you have access to in your department and the departments that are set up as children nodes on your Departmental Security Tree.
4. If you do use group security within Time and Labor, make sure your dynamic groups are refreshed to the date you need, in order to have the most up to date inclusion of employees in your list.

For all pages that you use to access time reporter information in the Time and Labor system, we will derive your view of time reporters based on the criteria above.



For more information about user profiles, roles, and access control lists; see *Administering Security* in your *PeopleSoft Application Fundamentals* PeopleBook.

Overview of Time and Labor Launch Pad pages

There are three pages that pertain to the Time and Labor Launch Pad.

Time and Labor Launch Pad Search page

The manager uses this page to search for a particular employee to view information for.



For more information about how to determine or set up which employees you have access to, see the *Understanding Security*.

Launch Pad page

The employee or the manager uses this page to view monthly payable time, forecasted payable time, reported elapsed time, reported punch time, exceptions, and recommended actions associated with each exception.

Details page

The employee or the manager uses this page to view detailed information about a specified day's reported elapsed time, reported punch time, exceptions, payable time, forecasted payable time, exceptions, and the recommendations associated with each exception.

Time and Labor Launch Pad Search Page

Usage	Use the Time and Labor Launch Pad Search page to specify the employee for whom you want to view information. This page lists the employees that report to you, the manager.
Object Name	TL_LPAD_MSS_EE
Navigation	For manager access: Self Service, Manager, View, Time and Labor Launch Pad
Prerequisites	Managers must have one or more employees reporting to them.
Access Requirements	You must be set up with a Manager Role.

Time and Labor Launch Pad						
My Employees						Find
Name	Job Code Description	Department	Workgroup	Taskgroup	Employee ID	Rcd#
Charles Baran	VP-Operations	KU021	KUWRKGRP4	KUTSKGRP4	KU0002	0
Kirby Dunbar	Director Canada	KC007	KCWRKGRP3	KUTSKGRP3	KC0002	0
Carmichael Espinosa	Systems Analyst	KU003	KUWRKGRP2	KUTSKGRP1	KU0015	0
James Fung	Consultant - Senior	KU001	KUWRKGRP2	KUTSKGRP5	KU0035	0
Martina Griffiths	Senior Secretary	KC001	KCWRKGRP3	KUTSKGRP3	KC0001	0
Dannv Johnson	HRMS Analyst	KU001	KUWRKGRP5	KUTSKGRP2	KU0042	1
Dannv Johnson	Administrative Assistant	KU001	KUWRKGRP4	KUTSKGRP3	KU0042	0
Charles Reid	Payroll Clerk	KC005	KCWRKGRP6	KUTSKGRP1	KC0004	0
Charles Reid	Human Resources Analyst	KC001	KCWRKGRP3	KUTSKGRP2	KC0004	1
Cynthia Rogers	Accounting Clerk	KC005	KCWRKGRP6	KUTSKGRP1	KC0003	0
Antonio Santos	Administrative Assistant	KU001	KUWRKGRP1	KUTSKGRP1	KU0010	0
Christelle Stevenson	Payroll Clerk	KU005	KUWRKGRP2	KUTSKGRP2	KU0020	0

Click on an employee's name to transfer to their calendar

Time and Labor Launch Pad Search page

The Time and Labor Launch Pad Search page displays the list of employees that report to the manager and each employee's job code description, department, workgroup, task group, employee ID, and employee record number. Select the employee for whom you would like to view time reporting calendar information by clicking on the employee's name link. Once you select an employee, you navigate to the Launch Pad Page.

Launch Pad Page

Usage	Use this page to view, at a glance, which days in the specified month have payable time, forecasted payable time, reported elapsed time, reported punch time, exceptions, and recommended actions associated with each exception. You can also change the calendar view to display the actual number of payable hours, forecasted payable hours, reported elapsed hours, reported punch hours, or scheduled hours that have been

	reported for each day.
Object Name	TL_LAUNCH_PAD
Navigation	- For manager access: Click on the employee's name on the Time and Labor Launch Pad Search Page to access the Launch Pad page. - For employee access: Self Service, Employee, Time and Labor Launch Pad

Time and Labor Launch Pad

Charles Baran

Reported Elapsed Hours

August 2000

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
	F	F	F	F	F	
<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>
	F	F	F	F	F	
<u>13</u>	<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>
	F	F	F	F	F	
<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>
	F	F	F	F	F	
<u>27</u>	<u>28</u>	<u>29</u>	<u>30</u>	<u>31</u>		
	F	F	F	F		

Launch Pad page

When the Launch Pad page opens, it displays the current month and year by default the first time you enter. From that point on, it will open up the Launch Pad in the same state in which you last left it. If you want to view a different month, you must select a new date and then select the **View** button. Or, you can use the **Previous Month** button or **Next Month** button to skip to the preceding or next month.

You can select to view either the employee's actual number of forecasted payable hours, exceptions, payable hours, reported elapsed hours, or scheduled hours for each day in the specified month. Select which information that you want to display and click on the **View** button. The calendar view changes depending on what you select. For example, if you selected the **Scheduled Hours** view option and 8.00 appears for one of the days in the calendar, it means that the employee is scheduled to work 8 hours on that day.

At any given time, any day in the calendar may display an **X**, **P**, **E**, **\$**, **F**, or **R**. These values indicate that there is information regarding reported time for that day. For example, if an **E** is displayed for one day on the calendar, it means that the employee has elapsed time reported for that day. If a **\$** appears, it means that payable time exists for that day. See the bottom of the Launch Pad page for the description of each of the values. If any of the days are highlighted or

linked, that indicates that the day has elapsed time, punch time, payable time, and exceptions with recommended actions for each exception. Click on the day to view the time reporting details that exist for that day.

In addition to being able to view time reporting information and details from this page, you can also kick off the Forecasted Payable time process that calculates forecasted payable time for the employee. In order to do this, click the **Forecast Payable Time** button. The system looks at the employee's schedule and/or any time they have reported for this month. It then indicates which days have payable time forecasted for them by displaying an *F* on the day. In order to view the number of forecasted hours for that day, change the view at the top of the page to **Forecasted Payable Hours** and click the **View** button. To view the details of the forecasted time, click on the link for the day you want to view.

Finally, if you want to navigate to a different part of the system to perform other transactions or just to get more information, you can use the **Go** field at the bottom of the page. Select the application item you want to navigate to from the drop-down list and click the **Go** button. Once you click the **Go** button, you will navigate to the feature you selected. Depending on how the application suites are set up, different options are available for the **Go** field.

Setting up the Application Suites

There are two application suites that apply to the Self Service components: the Time Management Application Suite and the Time Reporting Application Suite. The Time Management Application Suite is used to set up **Go** field in the Launch Pad Page for managers. Likewise, the Time Reporting Application Suite is used to set up the **Go** field for the Launch Pad page for employees. Both suites are delivered with the system. For each set up, you specify which application items the users (managers or employees) will have access to via the **Go** field in the Launch Pad page.



Only the items that the user has Permission List access to will be available in the Go drop-down list. For example, the Time Management Application Suite may have access to Adjust Payable Time, but the user may not. In that case, Adjust Payable Time would not be available to that specific user in the Go drop-down list.

Application Suite Page

Usage	Use this page to set up the application items that are available via the Go field in the Launch Pad Page.
Object Name	TL_APP_SUITE_PNL
Navigation	Define Business Rules, Define Time and Labor, Suites, Application Suite
Prerequisites	The user must have access to see this page.
Access Requirements	Select an application suite.

Application Suite

Application Suite

Application Suite: TIME MANAGEMENT

*Description: System Data - Time Management *Short Description: System Dat

View All First 1-6 of 13 Last

	*Itemname String	Description		
1	Adjust Paid Time	Adjust Paid Time	+	-
2	Approve Payable Time	Approve Payable Time	+	-
3	Approve Payable Time for a Group	Approve Payable Time for a Group	+	-
4	Manage Exceptions	Manage Exceptions	+	-
5	Manage Schedules -- Manager	Override Scheduled Workday	+	-
6	Review Compensatory Time	Review Compensatory Time	+	-

Application Suite page

In the **Application Suite** field, the page displays the application suite you are editing. In the **Itemname String** field, you can add or delete application Items.



Select the add button to add a row so you can select an additional application item.



Select the delete button to delete an application item.



Select the search button to view all possible application items available.

The Time Management Application Suite has 13 application items to choose from.

Application Suite

Application Suite

Application Suite: TIME MANAGEMENT

*Description: System Data - Time Management *Short Description: System Dat

View 6 First 1-13 of 13 Last

	*Itemname String	Description		
1	Adjust Paid Time	Adjust Paid Time	+	-
2	Approve Payable Time	Approve Payable Time	+	-
3	Approve Payable Time for a Group	Approve Payable Time for a Group	+	-
4	Manage Exceptions	Manage Exceptions	+	-
5	Manage Schedules -- Manager	Override Scheduled Workday	+	-
6	Review Compensatory Time	Review Compensatory Time	+	-
7	Review Schedule Assignments	Review Schedule Assignments	+	-
8	View Forecasted Payable Time -- Manager	View Forecasted Payable Time	+	-
9	View Payable Time(Detail) -- Manager	View Payable Time(Detail)	+	-
10	View Payable Time(Summary) -- Manager	View Payable Time(Summary)	+	-
11	View Schedule -- Manager	View Schedule	+	-
12	Weekly Elapsed Time Reporting -- Manager	Weekly Elapsed Time Reporting	+	-
13	Weekly Punch Time Reporting -- Manager	Weekly Punch Time Reporting	+	-

List of all application items available for the Time Management Application Suite

The Time Reporter Application Suite has 11 application items to choose from.

Application Suite			
Application Suite: TIME REPORTING			
*Description: System Data - Time Reporting		*Short Description: System Dat	
View 6 First 1-11 of 11 Last			
*Itemname String	Description		
1 Adjust Paid Time	Adjust Paid Time	+	-
2 Approve Payable Time	Approve Payable Time	+	-
3 Approve Payable Time for a Group	Approve Payable Time for a Group	+	-
4 Review Compensatory Time	Review Compensatory Time	+	-
5 Review Schedule Assignments	Review Schedule Assignments	+	-
6 View Forecasted Payable Time -- Employee	View Forecasted Payable Time	+	-
7 View Payable Time(Detail) -- Employee	View Payable Time(Detail)	+	-
8 View Payable Time(Summary) -- Employee	View Payable Time(Summary)	+	-
9 View Schedule -- Employee	View Schedule	+	-
10 Weekly Elapsed Time Reporting -- Employee	Weekly Elapsed Time Reporting	+	-
11 Weekly Punch Time Reporting -- Employee	Weekly Punch Time Reporting	+	-

List of all application items available for the Time Reporter Application Suite

Description of each Application item

Adjust Paid Time

Select this option to make record-only adjustments. If you need to make a change to time that has already been paid or closed, select this option. The changes you make aren't processed through payroll again. This feature is just used to update the PeopleSoft Time and Labor system; the information does not get passed on to payroll. For example, you may mistakenly report eight hours of regular time for an employee, but later you realize that it should have been eight hours of vacation time. It was fixed in PeopleSoft Payroll, but now you need to fix it in Time and Labor. In this scenario, you do not want the hours to get processed through to payroll again; you just want to note the change for record keeping purposes. You would use this feature for scenarios such as this.

For more information about adjusting paid time for an employee, see PeopleSoft 8 Time and Labor, "Managing Time".

Approve Payable Time

Select this option to approve the employee's time for payroll.

For more information about approving payable time for an employee, see PeopleSoft 8 Time and Labor, "Managing Time".

Approve Payable Time for a Group

Select this option to approve time for payroll for a group of employees.

For more information about approving payable time for a group, see PeopleSoft 8 Time and Labor, "Managing Time".

Manage Exceptions

Select this option to view and allow exceptions.

For more information about PeopleSoft 8 Time and Labor, "Managing Time".

Manage Schedules – Manager

Select this option to override an employee's schedule.

For more information about overriding an employee's scheduled workday, see Override Scheduled Workday Page.

Review Compensatory Time

Select this option to view an employee's compensatory time.

For more information about viewing an employee's compensatory time, see Review Compensatory Time Page.

Review Scheduled Assignments

Select this option to review an employee's scheduled assignments.

For more information about reviewing an employee's scheduled assignments, see PeopleSoft 8 Time and Labor, "Setting Up Time Reporters".

View Forecasted Payable Time – Manager/Employee

Select this option to view an employee's forecasted payable time.

For more information about viewing forecasted payable time, see Viewing Forecasted Payable Time.

View Payable Time (Detail) – Manager/Employee

Select this option to view an employee's payable time details.

For more information about viewing payable time details, see View Payable Time Details Page.

View Payable Time (Summary) – Manager/Employee

Select this option to view a summary of the employee's payable time.

For more information about see viewing a payable time summary, see View Payable Time Summary Page.

View Schedule – Manager/Employee

Select this option to view the employee's weekly schedule.

For more information about viewing a schedule, see View Work Schedule Page.

Weekly Elapsed Time Reporting – Manager/Employee

Select this option to view, report, or change the employee's reported weekly elapsed time.

For more information about weekly elapsed time, see Weekly Elapsed Time Page.

Weekly Punch Time Reporting – Manager/Employee

Select this option to view, report, or change the employee's weekly elapsed time.

For more information about weekly elapsed time, see Weekly Punch Time Page.

Once you select application items for an Application Suite, click the **Save** button to make the application items display in the **Go** function's drop-down list in the Launch Pad page.

Example:

I am going to set up the **Go** function for managers. I go to the Time Management Application Suite and select the following application items: Adjust Paid Time, Approve Payable Time, Approve Payable Time for a Group, Manage Exceptions, Override Scheduled Workday, Review

Scheduled Assignments, View Forecasted Payable Time, View Payable Time (Detail), View Payable Time (Summary), and View Schedule. Once I click the **Save** button, a manager can go to the Launch Pad page and view a list of all application items in the **Go** field. If they view the available option in the **Go** field, they'll see every application item that I set up in the Time Management Application Suite. They will see the screen shot below.

Time and Labor Launch Pad
Kirby Dunbar

Reported Elapsed Hours

August 2000 08 - August 2000 Reported Elapsed Hours View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 Civic Holi	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
				31		

Forecast Previous Month Next Month

Go to: Go

- Adjust Paid Time
- Approve Payable Time
- Approve Payable Time for a Group
- Manage Exceptions
- Override Scheduled Workday
- Review Schedule Assignments
- View Forecasted Payable Time
- View Payable Time(Detail)
- View Payable Time(Summary)
- View Schedule

Drop-down list of application items that were set up through the Time Management Application Suite.

Details Page

Usage	Use the Details page to view detailed calendar information for each day.
Object Name	TL_LAUNCH_PAD_DLY
Navigation	Click the date link on the Launch Pad Page to access the Details page.

Details for: 08/18/2006

Billy Braxton

Reported Elapsed Time		
Quantity	Type	Time Reporting Code
8.000000	Hours	Regular -
3.000000		

Reported Punch Time		
Punch Type	Punch Date Time	Time Zone

Exceptions				
Exception Id	Description	Status	Severity	Resolved by
TLX00420	Invalid TRC	Unresolved	High	
TLX00440	TRC is not in TRC Program	Unresolved	High	

Payable Time						
Quantity	Type	Time Reporting Code	Status	Estimated Gross	Distributed Amt	Diluted Amt

Forecast Payable Time

Forecasted Payable Time			
Quantity	Type	Time Reporting Code	Estimated Gross

Recommended Actions	
Action Required	Description

Go to:

Details page

The Details page displays information that exists for that day. It could show elapsed hours, punch hours, exceptions with associated recommended actions, payable time, and forecasted payable time, if they exist. The values *X*, *P*, *E*, *S*, *F*, or *R* that are on the Launch Pad Page signal what information appears on this page. The system reports time on different lines if there are different tasks, reporting codes, or shifts.

If you have not already calculated the forecasted payable time for the specified day, click the **Forecast Payable Time** button to do so. The system looks at the employee's scheduled or reported time to generate forecasted payable time. If there is no scheduled or reported time, no forecasted payable time is generated. However, if the system generates forecasted payable time, it appears in the **Forecasted Payable Time** group box.

Overview of Managing Schedules

Managing schedules includes reviewing employees' schedules and making changes, at the day level, to those schedules.

Some reasons you might want to change an employee's schedule include the following:

- An employee has a long-term schedule assignment and needs to temporarily change his schedule for one or more days.
- An employee does not have a long-term schedule assignment and needs to have a temporary schedule assignment for one or more days.
- You want to schedule an employee for a day off



This is for communication purposes only; it does not have any effect on, or contribute to, any leave processing. However, the Time Administration process can recognize it for the processing of rules.



For more information on the initial setup of schedules, see Defining Schedules.

View Work Schedule Page

Usage	Use this page to view an employee's schedule at the day level.
Object Name	SCH_VIEW_SCH_PNL
Navigation	- For manager access: Self Service, Manager, View, Work Schedule - For employee access: Self Service, Employee, View, Work Schedules
Prerequisites	The employee must be assigned to a schedule ID. The schedule ID must be built into a schedule calendar.
Access Requirements	Enter an employee ID.

View Work Schedule

Christelle Stevenson
ID: KU0020

Job Title: Sr Payroll Clerk

Enter a date and click on the GO button to see schedule.

Time Reporter's Schedule					
	From:	01/05/2000	To:	01/11/2000	
Description	Date	Day	Type	Punch Time	More...
8 Hour Punch Day	01/05/2000	Wednesday	In	8:00AM	More...
8 Hour Punch Day	01/05/2000	Wednesday	Meal	12:00PM	More...
8 Hour Punch Day	01/05/2000	Wednesday	In	1:00PM	More...
8 Hour Punch Day	01/05/2000	Wednesday	Break	3:00PM	More...
8 Hour Punch Day	01/05/2000	Wednesday	In	3:15PM	More...
8 Hour Punch Day	01/05/2000	Wednesday	Out	5:00PM	More...
8 Hour Punch Day	01/06/2000	Thursday	In	8:00AM	More...
8 Hour Punch Day	01/06/2000	Thursday	Meal	12:00PM	More...
8 Hour Punch Day	01/06/2000	Thursday	In	1:00PM	More...
8 Hour Punch Day	01/06/2000	Thursday	Break	3:00PM	More...
8 Hour Punch Day	01/06/2000	Thursday	In	3:15PM	More...
8 Hour Punch Day	01/06/2000	Thursday	Out	5:00PM	More...
8 Hour Punch Day	01/07/2000	Friday	In	8:00AM	More...
8 Hour Punch Day	01/07/2000	Friday	Meal	12:00PM	More...
8 Hour Punch Day	01/07/2000	Friday	In	1:00PM	More...
8 Hour Punch Day	01/07/2000	Friday	Break	3:00PM	More...
8 Hour Punch Day	01/07/2000	Friday	In	3:15PM	More...
8 Hour Punch Day	01/07/2000	Friday	Out	5:00PM	More...
8 Hour Punch Day	01/10/2000	Monday	In	8:00AM	More...
8 Hour Punch Day	01/10/2000	Monday	Meal	12:00PM	More...
8 Hour Punch Day	01/10/2000	Monday	In	1:00PM	More...
8 Hour Punch Day	01/10/2000	Monday	Break	3:00PM	More...
8 Hour Punch Day	01/10/2000	Monday	In	3:15PM	More...
8 Hour Punch Day	01/10/2000	Monday	Out	5:00PM	More...
8 Hour Punch Day	01/11/2000	Tuesday	In	8:00AM	More...
8 Hour Punch Day	01/11/2000	Tuesday	Meal	12:00PM	More...
8 Hour Punch Day	01/11/2000	Tuesday	In	1:00PM	More...
8 Hour Punch Day	01/11/2000	Tuesday	Break	3:00PM	More...
8 Hour Punch Day	01/11/2000	Tuesday	In	3:15PM	More...
8 Hour Punch Day	01/11/2000	Tuesday	Out	5:00PM	More...

[View Holiday Schedule](#)

View Work Schedule page

You must first select a date and then click the **Go** button. The system displays schedule information for one week, starting with the date you entered. Depending on the type of schedule, the system displays the scheduled days, a description of the scheduled days, punch type, punch time, and duration.

If you select an employee who has a punch or flex schedule, the **More...** link appears. Click the **More...** link if you want to see the Shift Details Page. Click the **View Holiday Schedule** hyperlink to see the Holiday Schedule Page.

Shift Details Page

Usage	Use the Shift Details page to view detailed information on the shift.
Object Name	SCH_VIEW_SEC_PNL1

Navigation	Click the More... link on the View Work Schedule Page to access the Shift Details page.

Shift Details

Shift ID:	KUFLXSHF
Shift Type:	Flex
Shift Start Time:	6:00AM
Shift End Time:	6:00PM
Scheduled Hours:	8.0
Flex Core Period Begin:	9:00AM
Flex Core Period End:	3:00PM
Flex Weekly Hours:	40

Shift Details page

Depending on the type of shift, the system displays the **Shift ID**, **Shift Type**, **Shift Start Time**, **Shift End Time**, **Scheduled Hours**, **Flex Core Period Begin**, **Flex Core Period End**, and **Flex Weekly Hours** fields. This information in these fields corresponds to the shift that the punch detail belongs to.

Click the **Return** button to return to the View Work Schedule Page.

Holiday Schedule Page

Usage	Use the Holiday Schedule page to view holidays for the employee.
Object Name	SCH_HOLDAY_SCH_SEC
Navigation	Click the View Holiday Schedule link on the View Work Schedule Page to access the Holiday Schedule page.

Holiday Schedule

Select Calendar Year:

Holiday	Description
01/03/2000	New Year's Day
04/21/2000	Good Friday
04/24/2000	Easter Monday
05/22/2000	Victoria Day
07/03/2000	Canada Day
08/07/2000	Civic Holiday
09/04/2000	Labour Day
10/09/2000	Thanksgiving Day

Holiday Schedule page

Select the calendar year for which you would like to view the holiday schedule. The system displays dates and descriptions of the holidays that are defined on the Holiday Schedule Table Page and associated with the employee.



The Holiday Schedule page is for your reference. The system does not include these holidays in employee's schedules.

Override Scheduled Workday Page

Usage	Use the Override Workday page to override an employee's schedule for a single workday. This page is for managers only.
Object Name	SCH_MNG_SCH_PNL
Navigation	For manager access: Self Service, Manager, Tasks, Override Scheduled Workday
Prerequisites	You must have created at least one workday.
Access Requirements	Enter an employee ID or search by name or department. You must also enter the date you want to override.

Override Scheduled Workday

Martina Griffiths
ID: KC0001

Job Title: Senior Secretary

Override Selection

Date That You Want To Override: 08/29/2000

Workday: Punch 8 Hour Day

[View Schedules](#)

Override Workday page



Adding or updating a row in the Workday Override table triggers Referential Integrity. Referential Integrity ensures that if the employee's Earliest Change Date is less than or equal to the date of the Workday Override, the Earliest Change Date will not be updated. If however, the Earliest Change Date is Null or is greater than the date of the Workday Override, the Earliest Change Date should be updated to the minimum effective date of Reported or Payable Time for the employee, that is equal to or greater than the date of the Workday Override.

The **Date That You Want To Override** field displays the date you entered to access the page. This is the date you want to override in the schedule. In the **Workday** field, enter the new workday that should replace the originally scheduled workday; this is the day you want the employee to work. The system displays a description of the workday you have selected.

Click the **View Schedules** link to access the employee's schedule, where you can view the three days prior to the workday override date through the three days following the workday override date.



The schedule does not include workday overrides that have not been saved.

Understanding Workday Override Logic

The system abides by the following rules when scheduled workdays conflict.

- When there is overlap between a Schedule Calendar workday and a workday override, the workday override always takes precedence over all Schedule Calendar workdays. Thus, Schedule Resolve will present the workday override schedule and disregard all hours of the Schedule Calendar workdays that overlap with the workday override.



Schedule Resolution is the process that is run when schedules are viewed online, when the scheduled hours report is run, and when Time Administration is run.

- Also, when you schedule a workday override for a punch or flex workday, not only is the originally scheduled workday overridden, but sometimes you override other workdays as well.
- Schedule Resolve only allows an employee to have one workday beginning on each day. Thus, if you want an employee to work a split shift, meaning work 08:00-12:00 and then 15:00-20:00, you must create one workday that contains both shifts.
- If third party schedule information exists for a day, then an online workday override is not allowed for the day. Third party schedule imports take precedence over online workday overrides as well as schedule calendar workdays.
- When there is conflict in scheduling time between two different workday overrides, the most recently entered workday override takes precedence over the preliminary workday override. To change a previously scheduled workday override, call up the same data you used to create the first workday override; you must use the same employee, employee record number, and the date of the scheduled workday override.

Workday Override Scenario 1

The employee has existing Schedule Calendar workdays and the manager enters an online workday override that overlaps with a Schedule Calendar workday that begins either a day before or after the workday override.

Scenario 1, Example A:

Employee A's Schedule Calendar workdays are as follows:

1 June: 23:00-8:00

3 June: 6:00-15:00

4 June: 6:00-15:00

However, the manager makes an online workday override that overlaps with hours in a Schedule Calendar workday that begins the **next** day. The manager makes the following workday override:

2 June: 23:00-8:00

This workday override conflicts with the Schedule Calendar workday 3 June. The workday override ends at 8:00, however, the Schedule Calendar workday is supposed to begin at 6:00 on the same day.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)		SW	SW	SW
Override (OV)			OV	

Override overlaps with hours in a Schedule Calendar workday that begins the next day

System's resolution for Scenario 1, Example A:

Because the workday override has hours that overlap with Schedule Calendar workday hours that begin on the next day, the following warning will appear:

The Workday Override has hours that overlap with a Schedule Calendar Workday. The Workday Override entered has hours that overlap with Schedule Calendar hours that begin on the next day. All hours from the Schedule Calendar Workday will be disregarded. Do you want to continue?

Next Day Warning

If the manager selects **OK**, then Schedule Resolve will present the scheduled override **and** disregard all of 3 June's Schedule Calendar workday hours.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)		SW	SW	SW
Override (OV)			OV	

Resolution to Scenario 1, Example A



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

Scenario 1, Example B:

Employee B's Schedule Calendar workdays are as follows:

1 June: 23:00-8:00

2 June: 23:00-8:00

3 June: 23:00-8:00

However, the manager makes an online workday override that overlaps with hours in a Schedule Calendar workday that begins the **previous** day. The manager makes the following workday override:

2 June: 6:00-15:00

This workday override conflicts with the Schedule Calendar workday 1 June. The workday override begins at 6:00, however, the Schedule Calendar workday is supposed to end at 8:00 on the same day.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)		SW	SW	SW
Override (OV)		OV		

Override overlaps with hours in a Schedule Calendar workday that begins the previous day

System's resolution for Scenario 1, Example B:

Because the workday override has hours that overlap with Schedule Calendar workday hours that begin on the previous day, the following warning will appear:

The Workday Override has hours that overlap with a Schedule Calendar Workday. The Workday Override entered has hours that overlap with Schedule Calendar hours that begin on the previous day. All hours from the Schedule Calendar Workday will be disregarded. Do you want to continue?

Previous Day Warning

If the manager selects **OK**, then Schedule Resolve will present the scheduled override **and** disregard all of 1 June's Schedule Calendar workday hours, since workday overrides take precedence over Schedule Calendar workdays when times overlap.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)		SW	SW	SW
Override (OV)		OV		

Resolution to Scenario 1, Example B



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

Workday Override Scenario 2

User makes an online workday override that is OK because it does not create any overlap with other Schedule Calendar workdays. However, after the workday override is entered, either a change is made to a Schedule Calendar the employee is assigned to or the employee is given a new schedule assignment. Given the modified or new schedule, the workday override has hours that overlap with a Schedule Calendar day that begins on the previous or next day.

Scenario 2, Example C:

Employee C's Schedule Calendar workdays were as follows:

1 June: 17:00-23:00

2 June: 17:00-23:00

3 June: 17:00-23:00

4 June: 17:00-23:00

The manager makes an online workday override that does not overlap with any of the hours in the Schedule Calendar workdays. The manager makes the following workday override:

3 June: 6:00-15:00

After the override is entered, the Schedule Calendar to which the employee is assigned changes. The shift used in the Schedule Calendar is now 22:00-7:00 instead of 17:00-23:00.

When changes are made to the Schedule Calendar, all original Schedule Calendar workday information is disregarded and the modified Schedule Calendar workday information is presented. The workday override overlaps with the modified Schedule Calendar workday 2 June.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Original Schedule Calendar				
Workday (OS)	OS	OS	OS	OS
Override (OV)			OV	
Modified Schedule Calendar				
Workday (MS)	MS	MS	MS	MS

A modified Schedule Calendar workday begins the day before the workday override and has hours that overlap with the workday override

System's resolution for Scenario 2, Example C:

Since workday overrides take precedence over Schedule Calendar workdays, Schedule Resolve will present the scheduled override **and** disregard all of 2 June's Schedule Calendar workday hours.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Original Schedule Calendar				
Workday (OS)	OS	OS	OS	OS
Override (OV)			OV	
Modified Schedule Calendar				
Workday (MS)	MS	MS	MS	MS

Resolution to Scenario 2, Example C



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

Scenario 2, Example D:

Employee D's Schedule Calendar workdays were as follows:

1 June: 14:00-23:00

2 June: 14:00-23:00

3 June: 14:00-23:00

The manager makes an online workday override that does not overlap with any of the hours in the Schedule Calendar workdays. The manager makes the following workday override:

2 June: 22:00-7:00

After the override is entered, the manager changes the employee's schedule assignment so that the employee's shift is from 6:00-14:00 instead of 17:00-23:00.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Original Schedule Calendar				
Workday (OS)	OS	OS	OS	
Override (OV)			OV	
New Schedule Calendar				
Workday (NS)		NS	NS	NS

Employee's new Schedule Calendar Assignment has a workday that begins the day after the workday override and has hours that overlap with the workday override

System's resolution for Scenario 2, Example D:

Since workday overrides take precedence over Schedule Calendar workdays, the Schedule Resolve will present the scheduled override **and** disregard all of 3 June's New Schedule Calendar workday hours.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Original Schedule Calendar				
Workday (OS)	OS	OS	OS	
Override (OV)			OV	
New Schedule Calendar				
Workday (NS)		NS	NS	NS

Resolution to Scenario 2, Example D



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

Workday Override Scenario 3

User tries to enter a workday override that has hours that overlap with hours from a previous workday override that begins on the day before.

Scenario 3, Example E:

Employee E's Schedule Calendar workdays were as follows:

1 June: 17:00-23:00

2 June: 17:00-23:00

3 June: 17:00-23:00

The manager makes an online workday override. The manager makes the following workday override:

2 June: 22:00-7:00

However, the manager decides to do another override that overlaps the original override. The manager makes the following new workday override:

3 June: 5:00-14:00

The second workday override has hours that overlap with hours from the first workday override that begins the day before.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)	SW	SW	SW	
Original Override (OV1)		OV1		
New Override (OV2)			OV2	

The previous workday override begins the day before the new workday override and has hours that overlap with the new workday override.

System’s resolution for Scenario 3, Example E:

When overrides overlap, the system will use the most recent override and disregard the previous override(s). Thus, Schedule Resolve will disregard the original override. In doing so, there is no longer a conflict with Schedule Calendar workday 2 June. Hence, Schedule Calendar workday 2 June is no longer disregarded; it is now presented. Schedule Resolve will also present the new workday override.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)	SW	SW	SW	
Original Override (OV1)		OV1		
New Override (OV2)			OV2	

Resolution to Scenario 3, Example E



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

Scenario 3, Example F:

Employee H’s Schedule Calendar workdays were as follows:

1 June: 14:00-23:00

2 June: 14:00-23:00

3 June: 14:00-23:00

The manager makes an online workday override. The manager makes the following workday override:

3 June: 6:00-15:00

However, the manager decides to do another override. The manager makes the following new workday override:

2 June: 22:00-7:00

The second workday override has hours that overlap with hours from the first workday override that begins the next day.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)	SW	SW	SW	
Original Override (OV1)			OV1	
New Override (OV2)		OV2		

The previous workday override begins on the day after the new workday override and has hours that overlap with the new workday override.

System's resolution for Scenario 3, Example F:

When overrides overlap, the system will use the most recent override and disregard the previous override(s). Thus, Schedule Resolve will disregard the original override and present the new override. In doing so, there is no longer a conflict with Schedule Calendar workday 3 June. Hence, Schedule Calendar workday 3 June is no longer disregarded; it is now presented.

Schedule Type	Scheduled Time			
	1 June	2 June	3 June	4 June
Schedule Calendar Workday (SW)	SW	SW	SW	
Original Override (OV1)			OV1	
New Override (OV2)		OV2		

Resolution to Scenario 3, Example F



White boxes indicate schedule that will be presented. Grey boxes indicate schedules that will be disregarded.

View Schedules Page

Usage	Use the View Schedules page to view schedules.
Object Name	SCH_VIEW_SCH_PNL1

Navigation	Click the View Schedules hyperlink on the Override Scheduled Workday page.

Schedule				
Description	Date	Day	Type	Duration
Off	08/26/2000	Saturday		
Off	08/27/2000	Sunday		
10 Hour Elapsed Shift	08/28/2000	Monday	Elapsed	10.00
10 Hour Elapsed Shift	08/29/2000	Tuesday	Elapsed	10.00
10 Hour Elapsed Shift	08/30/2000	Wednesday	Elapsed	10.00
10 Hour Elapsed Shift	08/31/2000	Thursday	Elapsed	10.00
Off	09/01/2000	Friday		

Schedule does not include Workday Overrides that have not been saved

View Schedules page

The system displays a Description, Date, Day, and Type of the payee's schedule for the day of the workday override and the three days before and after that date. The schedule does not include Workday Overrides that have not been saved.

Overview of Reporting Time

There are three time reporting methods within the self-service area of PeopleSoft Time and Labor: Weekly Punch Time, Weekly Elapsed Time, and Mass Time Reporting. Each of these methods provides a way for you to report the time worked for a given period. After you enter time, you can save the page and the time is submitted for processing. During the Submit Time process, the system validates the data you entered and records any invalid entries into an exceptions table that a manager can review on the Manage Exceptions Pages.

Weekly Punch Time Page

Usage	Use the Weekly Punch Time page to enter, view or change weekly punch time for employees.
Object Name	TL_TR_PUNCH_ADM
Navigation	- For manager access: Self Service, Manage, Tasks, Weekly Punch Time - For employee access: Self Service, Manage, Tasks, Weekly Punch Time
Prerequisites	You must create a time reporting template that specifies the fields that are to appear on the Weekly Punch Time page and assign the template to the time reporter's task group. (You can also assign a time reporting template directly to the time reporter using the Create Time Reporter Data page. This template takes precedence over the template assigned to the time reporter's task group.)

Access Requirements	Select an employee and enter the date of the period for which you want to view or report time .

Weekly Punch Time

Christelle Stevenson ID: KU0020

From 08/25/2000 to 08/31/2000

*Date	*Time	*Type	Country	State	Locality	Task Profile ID	More...	Delete
08/28/2000	9:00AM	In	USA	CA		KUTSKPRF2A	More...	Delete
08/28/2000	6:00AM	Out	USA	CA		KUTSKPRF2A	More...	Delete

Add a Punch

Save

* Required Field

Weekly Punch Time page

Once you specify a date, the page opens and displays the fields that are specified on the time reporting template for the employee. These fields should be the time reporting elements to which your employees almost always report their time. The manager or employee can use this page to report new time, change or override existing time, or just view existing time. To add additional time punches, click the **Add a Punch** button. Click the **Delete** button to delete a row of punch time.



For more information about each field that appears on the page and how the system handles these values, see *Creating Time Reporting Templates* in your PeopleSoft Time and Labor PeopleBook.

After you enter or change punch time information, click the **Save** button to save the information and submit the time for processing. During this phase, the system validates the data you entered and records any invalid entries into an exceptions table that the manager can review on the Managing Exceptions.

To report additional time reporting or task element information, click the **More** link. The system opens the Weekly Punch Time Detail Page.

Weekly Punch Time Detail Page

Usage	Use the Weekly Punch Time Detail page to enter additional information about a punch.
Object Name	TL_TR_PUNCH_S1
Navigation	Click the More link on the Weekly Punch Time Page.

Weekly Punch Time

Christelle Stevenson

Change any of the following elements and click the "OK..." hyperlink at the bottom when finished.

Time Reporting Elements			
Taskgroup:	KUTSKGRP2	Task Profile ID:	KUTSKPRF2A
*Date:	08/28/2000	Country:	USA
*Time:	9:00AM	State:	CA
Day:	Monday	Locality:	
*Type:	In	Rule Element 1:	
Time Zone:	PST	Rule Element 2:	
Time Collection Device ID:		Rule Element 3:	
Badge ID:		Rule Element 4:	
Override Reason Code:		Rule Element 5:	
Comments:			

[Save and Return to Weekly Punch Time Reporting](#)
[Cancel and Return to Weekly Punch Time Reporting](#)

Weekly Punch Time Detail page

On this page, the system displays all possible time reporting and task reporting elements to which your employees can report their time. This is useful when your employees only report time to certain elements once in a while. This page overrides any default time reporting and task reporting elements assigned to the employee. For example, the employee normally reports time to a specific locality, but for this day the employee needs to allocate their time to a different locality. The employee could enter a new value in the **Locality** field. This new value overrides the default value that has been assigned to the employee.

Another example is when an employee is normally assigned to a specific task group or task profile. They can use this page to borrow into a different task group or task profile for this day.



If you have the Edit Prior Period Time checkbox cleared on the Row Security Permission List Page and you try to enter for a prior period, when you save the page, you get an error message indicating that the time cannot be saved or reported. If there has been a change to your time reporting template that takes effect during the middle of your time reporting period, you need to report time to both time reporting templates for that period. For example, if your time reporting period goes from 1 August 2000 through 7 August 2000, and there has been a change to your time reporting template effective 5 August 2000, you need to report time for 1 August 2000 through 4 August 2000 to one session, using the old template. Then, you must start a new session and report time for 5 August 2000 through 7 August 2000, using the new template. If you try to report time for 1 August 2000 through 7 August 2000 in the same session, you receive an error message indicating that a midperiod adjustment has occurred and the page cannot be saved.



For more information on midperiod adjustments, see Step 2 - Combine Time Reporters Into Batches. For more information about each field that appears on the page and how the system handles these values, Creating Time Reporting Templates in your PeopleSoft Time and Labor PeopleBook.



If you have the **Edit Prior Period Time** check box cleared on the Row Security Permission List Page you may use the **Days Grace Allowed** feature. By filling in this field, you may limit the period of time during which users can enter prior period adjustments. For example, if the **Days Grace Allowed** field is set to 7 days, you will have 7 days from the last time period end date to enter new time or make adjustments to that period. If you try to enter or adjust time on the Weekly Punch Reporting page after the 7-day grace period, you will receive an error message and will not be able to save the page.

Weekly Elapsed Time Page

Usage	Use the Weekly Elapsed Time page to enter, view, or change elapsed time for the employee.
Object Name	TL_TR_WEEKLY
Navigation	- For manager access: Self Service, Manage, Tasks, Weekly Elapsed Time - For employee access: Self Service, Manage, Tasks, Weekly Elapsed Time
Prerequisites	You must create a time reporting template that specifies the fields that are to appear on the Weekly Elapsed Time page and assign the template to the time reporter's task group. (You can also assign a time reporting template directly to the time reporter using the Create Time Reporter Data page. This template takes precedence over the template assigned to the time reporter's task group.)
Access Requirements	Enter the date for which you want to report or view time.

Weekly Elapsed Time
Christelle Stevenson ID: KU0020

Enter or change time reporting data in the table below. Time may also be entered by pressing the "Apply Schedule" pushbutton. The pushbutton will populate data in the table with time reporting data from the employee's scheduled time definition. If additional lines for time entry are needed, press the "Add a New Line" pushbutton.

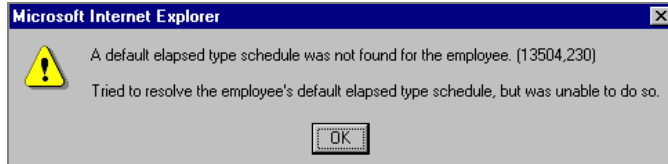
From Friday 08/25/2000 to Thursday 08/31/2000

Fri 8/25	Sat 8/26	Sun 8/27	Mon 8/28	Tue 8/29	Wed 8/30	Thu 8/31	Time Reporting Code	Type	Country	State	Locality	Billable	Business Unit	Department
0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000						☐		

Weekly Elapsed Time Reporting page

Once you specify a date, the page opens and displays the days of the week for your employees to report their time. The display starts on the date you entered to access the page. The system only displays the fields that were specified on the time reporting template for the employee. These fields should be the time reporting elements to which your employees most often report their time. The manager or employee uses this page to report new time, change or override existing time, or just view existing time.

Click the **Apply Schedule** button if you want the system to generate and display the default scheduled time. The system populates the Time Entry page with your schedule information for that week so you don't have to type in the same information every week. The default value is dependent upon scheduled time set up for an employee. The system populates the number of hours for each day of the week based on scheduled time. If there is no schedule information, you receive the error message below:



You can override the default data by entering new times in the schedule and then clicking the **Save** button. If you click the **Add a New Line** button, the system adds a row for you to report additional time. If you want to delete a row of reported time, click the **Delete** button. If you want to delete time for only one day, delete the number of hours in the day's field and enter a zero instead.

After you enter time, you save the page and the time is submitted for processing. During this phase, the system validates the data you've entered and records any invalid entries into an exception table that a manager can review on the Manage Exceptions Pages.

Click the **More** link to access the Weekly Elapsed Time Detail Page, where you can report additional time reporting or task element information.

Weekly Elapsed Time Detail Page

Usage	Use the Weekly Elapsed Time Detail page to enter additional information about a punch time.
Object Name	TL_TR_WEEKLY_S1

Navigation

Click the More link on the Weekly Elapsed Time Page.

More Time Reporting Information

Martina Griffiths
Change any of the following elements and click the "OK..." hyperlink at the bottom when finished.

Time Reporting Elements

Taskgroup:

Time Reporting Code:

Time Reporting Code Type / UOM:

Currency:

Rate Code:

Override Rate:

Override Reason Code:

Country:

State:

Locality:

Comments:

☐ Billable

Badge ID:

Time Collection Device ID:

Rule Element 1:

Rule Element 2:

Rule Element 3:

Rule Element 4:

Rule Element 5:

Task Reporting Elements

Business Unit:

Location:

Task:

[Save and Return to Weekly Elapsed Time Reporting](#) [Cancel and Return to Weekly Elapsed Time Reporting](#)

Weekly Elapsed Time Detail page

On this page, the system displays all possible time reporting and task reporting elements to which your employees can report their time. This is useful when your employees only report time to certain elements once in a while. This page overrides any default time reporting and task reporting elements assigned to the employee. For example, the employee normally reports time to a specific locality, but for this day, the employee needs to allocate their time to a different locality. The employee could enter a new value in the **Locality** field. This new value overrides the default value that has been assigned to the employee.

Another example is when an employee is normally assigned to a specific task group or task profile. They can use this page to borrow into a different task group or task profile for this day.



If you have the Edit Prior Period Time checkbox selected on the Row Security Permission List Page and you try to enter data for a prior period, when you save the page you get an error message indicating that the time cannot be saved or reported. If there has been a change to your time reporting template that takes effect during the middle of your time reporting period, you need to report time to both time reporting templates for that period. For example, if your time reporting period goes from 1 August 2000 through 7 August 2000 and there has been a change to your time reporting template, effective 5 August 2000, you need to report time for 1 August 2000, to one session, using the old template. Then, start a new session and report time for 5 August 2000 through 7 August 2000 using the new template. When you open up the page for a session starting on 1 August 2000, notice that you are only able to enter time for 1 August 2000 through 4 August 2000. You need to open up a new session starting on 5 August 2000, in order to report time for 5 August 2000 and beyond.



For more information on midperiod adjustments, see Step 2 - Combine Time Reporters Into Batches. For more information about each field that appears on the page and how the system handles these values, Creating Time Reporting Templates in your PeopleSoft Time and Labor PeopleBook.



If you have the Edit Prior Period Time check box cleared on the Row Security Permission List Page you may use the Days Grace Allowed feature. By filling in this field, you may limit the period of time during which users can enter prior period adjustments. For example, if the Days Grace Allowed field is set to 7 days, you will have 7 days from the last time period end date to enter new time or make adjustments to that period. If you try to enter or adjust time on the Weekly Elapsed Reporting page after the 7-day grace period, the page will open up and all the fields in the grid will be display only.

Time Reporting Code

Select a time reporting code. The system populates the time reporting code to which the time was reported within the date range. This TRC could have been manually entered by the time reporter or automatically by the system during time reporting.

Currency

Select a currency code for the time you want to adjust if you require your employee's to report a currency type code for the time being reported and if the TRC type for the time is an amount.

Rate Code

Select a rate code.

Override Rate

Select an override rate for the time you want to adjust. The rate is passed to your payroll system to use in calculating pay. Otherwise, the rate is the rate on the time reporting code or the hourly rate on the employee's job record by default.

Country

Select the country for the time you want to adjust. Otherwise, the system uses the default value for the time reporter.

State

Select the state for the time you want to adjust if you want to report a state other than the default value associated with the employee's tax location code.

Locality

Select the locality for the time you want to adjust if you want to report a locality other than the default value for the employee. The locality should be reported with the associated state. The state and locality combination must be defined for the time reporter on the Maintain Tax Data pages.

Product	This element appears if this task element is defined on the task group associated with the employee. Select a product for the time you want to adjust.
Customer	This element appears if this task element is defined on the task group associated with the employee. Select a customer for the time you want to adjust.
Task	This element appears if this task element is defined on the task group associated with the employee. Select a task for the time you want to adjust.
Perf Meas Business Unit	This element appears if this task element is defined on the task group associated with the employee. Select a value for the Perf Meas Business Unit field for the time you want to adjust.
Activity ID	This element appears if this task element is defined on the task group associated with the employee. Select an activity ID for the time you want to adjust.
Business Unit	Select a business unit. This element appears if this task element is defined on the task group associated with the employee. Select a business unit for the time you want to adjust.
Department	This element appears if this task element is defined on the task group associated with the employee. Select a department for the time you want to adjust.
Job Code	Select a job code. This element appears if this task element is defined on the task group associated to the time reporter.
Position	Select the position. This element appears if this task element is defined on the task group associated to the time reporter.

Elapsed Reporting Template

Billable Indicator	Select this check box if you want the time to be available to the Mobile Time and Expense feature in PeopleSoft Projects.

Mass Time Reporting

The Mass Time Reporting feature enables a manager or employee to report time in several different ways by using a template type format. The user is asked a series of questions about who they want to report time for, when they want to report the time for, and how they want to report that time. Depending on how the user answers the questions, the system generates time for a specific person or group and for either a specific date or a range of dates.

Employees and Managers use the Mass Time Reporting feature to save them time and keystrokes when reporting time. It enables the manager or employee to easily report different attributes of time for a period rather than having to enter them in manually for each day in the specified period.

There are three pages that pertain to Mass Time Reporting:

- 1) Mass Time Reporting - Select Group Page
- 2) Mass Time Reporting Page (page 1 of 2)
- 3) Mass Time Reporting Page (page 2a of 2) or Mass Time Reporting Page (page 2b of 2)

Mass Time Reporting - Select Group Page

Usage	Use this page to select which employees you want to report time for.
Object Name	TL_MASS_WHO
Navigation	For manager access: Self Service, Manage, Tasks, Mass Time Reporting
Prerequisites	None
Access Requirements	You must be set up with a Manager Role to access this page.

Mass Time Reporting

Time Reporting Options

Please select one of the following Time Reporting options. Clicking either of the buttons at any time will remove all employees from the list below and refresh the list.

Group ID:

Report Time for: First Last

	Name	Job Code Description	Department	Workgroup	Employee ID	Empl Rcd#
☐	Baran, Charles	VP-Operations	KU021	KUWRKGRP4	KU0002	0
☐	Dunbar, Kirby	Director Canada	KC007	KCWRKGRP3	KC0002	0
☐	Espinosa, Carmichael	Systems Analyst	KU003	KUWRKGRP2	KU0015	0
☐	Fung, James	Consultant - Senior	KU001	KUWRKGRP2	KU0035	0
☐	Griffiths, Martina Rae	Senior Secretary	KC001	KCWRKGRP3	KC0001	0
☐	Johnson, Danny	Administrative Assistant	KU001	KUWRKGRP4	KU0042	0
☐	Johnson, Danny	HRMS Analyst	KU001	KUWRKGRP5	KU0042	1
☐	Reid, Charles M	Payroll Clerk	KC005	KCWRKGRP6	KC0004	0
☐	Reid, Charles M	Human Resources Analyst	KC001	KCWRKGRP3	KC0004	1
☐	Rogers, Cynthia A	Accounting Clerk	KC005	KCWRKGRP6	KC0003	0
☐	Santos, Antonio	Administrative Assistant	KU001	KUWRKGRP1	KU0010	0
☐	Stevenson, Christelle	Payroll Clerk	KU005	KUWRKGRP2	KU0020	0

Mass Time Reporting - Select Group page

The managers can use this page to report time for employees that report directly to them or for a group of employees that may not necessarily report directly to them. In order to report time for more than one person at the same time, the selected employees must share some of the same time reporting attributes. For example, if you are reporting time for a group of employees using a specific time reporting code (TRC), that time reporting code must exist in the TRC programs to which the employees are assigned. Otherwise, the system generates an exception to indicate that the reported TRC is not in the specified employee's TRC program.

If you want to report time for employees from a single group, select their group ID from the drop-down list box and then click the **Get Employees in Group** button. This retrieves a list of all the employees assigned to that group. If, instead of a group, you want to select the employees that report directly to you, click the **Get My Employees** button. The system displays a list of all the employees that report directly to you. The system determines this information based on the time manager's row security class and a view called PS_TL_ADM_SRCH_VW. Once the list of employees appears, you indicate for which employees you want to report time. You can select individual employees by selecting the check box beside their names, or you can click the **Select All** button to indicate that you want to report time for all the employees in the list. When you have finished selecting your employees, click on the **Next** button to go to the next segment of the page, the Mass Time Reporting Page (page 1 of 2).



For more information about how to determine or set up which employees you have access to, see Understanding Security.

Mass Time Reporting Page (page 1 of 2)

Usage	Use this page to specify the range of dates and the method for reporting time.
Object Name	TL_MASS_TIME_SELF
Navigation	- For manager access: Click the Next button on the Mass Time Reporting - Select Group Page. - For employee access: Self Service, Employee, Tasks, Mass Time Reporting

Mass Time Reporting page (page 1 of 2)

To report time for just one day, select the **Just One Date** option and fill in the date. To report time for a range of dates, select the **Range of Dates** option and fill in the date fields to specify a beginning and end date.

There are three ways the Mass Time Reporting feature enables the user to report time:

1. Use the scheduled hours for the days specified.

Use this option to report time according to your schedule. If you or your employees are assigned to a schedule, you can report time according to that schedule for a specified day or for a range of dates. Once you specify the date or date range, the system generates reported time by looking at what your schedule lists for the dates you specified. For example, if you want to report taking vacation for two weeks, you can specify a date range for those two weeks and indicate a time reporting code to be applied. The system takes a look at how your schedule is built out for that particular date range and generates reported time for the same amount of hours for those dates. You or your employee(s) must be assigned to a schedule in order for reported time to be generated using this option.



The time reporter must be assigned to a schedule to use this feature.

2. Use the total number of hours entered and distribute them over the schedule.

Use this option if you want to specify a lump sum amount, for example, 40 hours, and have it distributed according to your or your employee's schedule over the date or date range specified. For example, if you specify a date range of two weeks, indicate a time reporting code of *REG*, and input 80 hours to be distributed, the system looks at your schedule and distribute 80 hours of *REG* over the two weeks according to how your schedule is set up. You or your employees must be assigned to a schedule in order for reported time to be generated using this option.



Note. The employee must be assigned to a schedule to use this feature. Also, the system doesn't take the total number of hours and distribute them evenly over the time period. If your schedule dictates that you normally work only 70 hours in a two week period, and you enter 80 hours to be distributed, then the extra 10 hours is lumped into the last day of the date range specified. The reason for this is that you are requesting that a lump sum of time to be distributed according to your schedule. If the number of hours you report are short or over what's indicated in the schedule, those hours is applied to the last day.

3. Specify multiple time transactions to be applied to each day in the time period.

Use this option to report time and specify multiple transactions for the system to apply to the specified date or date range. For example, let's say there is one week for which you need to report six hours of regular time and two hours of paid time off for each day, instead of reporting your usual eight hours of regular time. Rather than having to enter these two transactions for each day, using this feature, you can enter it only once by specifying six hours of REG and two hours of PTO. The system applies the six hours of REG and two hours of PTO to each of the days you specified. You do not need to be assigned to a schedule in order to report time using this option.

You can use the **Include Off Days in Schedule** check box with this third option if you want the system to apply the same transaction to all days in the specified range, including your regularly assigned days off in your schedule. For example, if you specified a date starting with a Monday and ending on a Sunday, and you select this check box, then the time is reported for each day – Monday through Sunday, even though you normally have Saturday and Sunday off.

Mass Time Reporting Page (page 2a of 2)

Usage	Use this page to indicate additional attributes about the time you are reporting.
Object Name	TL_MASS_TIME_MSS
Navigation	Click the Next button on the Mass Time Reporting Page (page 1 of 2).
Prerequisites	None
Access Requirements	You must enter a date or date range and use the <i>Use the scheduled hours for the day(s)</i> specified or <i>Use the total number of hours entered and distribute them over the schedule</i> option for reporting time on the Mass Time Reporting Page (page 1 of 2).

Mass Time Reporting

Reporting Time for Employees

Reporting Date Range: 02/07/2000 To 02/25/2000

Use the total number of hours entered and distribute them according to the schedule.

Reporting Details

Specify which Time Reporting Code (TRC) you want to use.

Specify how much you want to report.

Indicate whether you would like to use your Task Profile. ☒

Replace Existing Time ☐

Mass Time Reporting page (page 2a of 2)

This page opens up after selecting one of the first two options and clicking on the **Next** button on the Mass Time Reporting Page (page 1 of 2). You must specify a time reporting code in the **Specify which Time Reporting Code (TRC) you want to use** field. This will tell the system which method to use for processing the time worked. Every TRC that is active and has been set up in the system appears here. You must select a TRC that is attached to the TRC program assigned to the employee for whom you are reporting time. If you select a TRC that is not valid for an employee, the system generates an exception when you submit the time. If you are reporting a lump sum of time to be distributed according to your schedule, enter the total number of hours you want distributed in the **Specify how much you want to report** box. Select the **Indicate whether you would like to use your Task Profile** check box if you would like to apply the task profile information, that is assigned on your Time and Labor Employee Data record, to this instance of reported time.

Select the **Replace Existing Time** checkbox if you want to overwrite any existing data for the dates you have specified. This will replace any time that was generated through Rapid Time Entry or Mass Time Entry, or that has a reported time SYS. If you do not select this check box, the system adds the time in this entry to any previous data. For example, suppose you have reported 8 hours of TRC 'REG' for an employee on 1 March 2000. Then you make an entry of 2 hours of TRC *REG* for the same employee on the same date. If you have selected this check box, the system records 2 hours of TRC *REG* for that day. If you have not selected this check box, the system records 10 hours of TRC *REG* for this date.



Time generated through the Weekly Elapsed or Punch pages is not replaced. Time entered through the Mass Time feature is added to any time that was entered through the weekly pages.

Once you entered in the information, click the **Save** button to submit the time that you reported for processing. The time runs through a validation process, where the system generates exceptions if there are errors. The Submit process updates the employee's status codes and

creates reported time. If you have selected the Automatic Rules Run option on the TL Installation Page, the Time Administration process runs and creates payable time.

Mass Time Reporting Page (page 2b of 2)

Usage	Use this page to indicate additional attributes about the time you are reporting.
Object Name	TL_MASS_SELF_SAVE
Navigation	Click the Next button on the Mass Time Reporting Page (page 1 of 2).
Prerequisites	None.
Access Requirements	You must select a date or date range and use the <i>Specify multiple time transactions, to be applied to each day in the time period</i> option as the method for reporting time on the Mass Time Reporting Page (page 1 of 2).

Mass Time Reporting

Reporting Time for Employees

Reporting Date Range: 02/07/2000 To 02/25/2000

Specify multiple time transactions, to be applied to each day in the time period.

Reporting Details

Taskgroup: KUTSKGRP1

TRC	Quantity	More
KUBNS	6.000000	More -
KUCE1	2.000000	More -
+		

Previous

Replace Existing Time ☐

Save

Mass Time Reporting Page (page 2b of 2)

The Taskgroup field is optional. If the Taskgroup field is left blank, when the time is submitted, it will default to the employee's assigned Taskgroup that is indicated on their Time and Labor Employee Data record or the Taskgroup assigned to the group you are reporting for. If a different Taskgroup is selected other than their default one, then this will be considered Taskgroup borrowing. When the time is submitted, it will use the task reporting elements associated with that borrowed Taskgroup. If selecting a Taskgroup, this will drive the fields shown when the **MORE** button is pushed.

Next, you must specify all the transactions that the system is to report for each of the days in the specified date range. You must select a time reporting code in the Specify which Time Reporting Code (TRC) you want to use field on the Mass Time Reporting page (page 2a of 2) in order to for

the system to know which method to use for processing the time worked. Every TRC that is active and has been set up in the system appears here. You must select a TRC that is attached to the TRC program assigned to the employee you are reporting time for. If you select a TRC that is not valid for an employee, the system generates an exception when the time is submitted. In addition to the TRC, enter the number of hours in the **Quantity** field. To add additional transactions, click the **Add** button.

Select the **Replace Existing Time** checkbox if you want to overwrite any existing data for the dates you have specified. This will replace any time that was generated through Rapid Time Entry or Mass Time Entry, or that has a reported time source of SYS. If you do not select this check box, the system adds the time in this entry to any previous data. For example, suppose you have reported 8 hours of TRC *REG* for an employee on 1 March 2000. Then you make an entry of 2 hours of TRC *REG* for the same employee on the same date. If you have selected this check box, the system records 2 hours of TRC *REG* for that day. If you have not selected this check box, the system records 10 hours of TRC *REG* for this date.



Time generated through the Weekly Elapsed or Punch pages isn't replaced. Time entered through the Mass Time feature is added to any time that was entered through the weekly pages.

Once you entered in the information, click the **Save** button to submit the time you reported for processing. The time runs through a validation process, where the system generates exceptions if there are any errors. The Submit process updates the employee's status codes and creates reported time. If you have selected the Automatic Rules Run option on the TL Installation Page, the Time Administration process runs and create payable time.

Click the **More** button to access the Mass Time Detail Page, where you can report additional time reporting elements.

Mass Time Detail Page

Usage	Use this page to report additional Time Reporting Elements and Task Elements.
Object Name	TL_MASS_MORE_SEC
Navigation	Click the More link on the Mass Time Reporting Page (page 2b of 2).

TL Mass Time Secondary Page

Change any of the following elements and click the "OK..." hyperlink at the bottom when finished.

Time Reporting Elements

Time Reporting Code:	Bonus	Amount	Elapsed Reporting Template:
Currency:	US Dollar		☒ Billable Indicator
Rate Code:	KE0004		
Override Rate:			
Country:	USA		
State:			
Locality:			
Product:	Computers - Keyboard		
Customer:	Customer 1		
Task:			
Perf Meas Business Unit:			
Activity ID:			

Mass Time Detail page



For information about the field definitions, see the Weekly Elapsed Time Detail Page. For more information about how the system handles these values, see Creating Time Reporting Templates in your PeopleSoft Time and Labor PeopleBook.

Review Compensatory Time Page

Usage	Use this page to view compensatory time balance and expiration information for employees.
Object Name	TL_COMPTIME_PNL
Navigation	- For manager access: Self Service, Manage, View, Compensatory Time Balance - For employee access: Self Service, Manage, View, Compensatory Time Balance
Prerequisites	The employee must be assigned to a compensatory time plan on their workgroup.
Access Requirements	Select an employee.

Review Compensatory Time

Martina Griffiths ID: KC0001

Job Title: Senior Secretary

Comp Time Balance Summary

Today's Date: 08/28/2000

Balance at Beginning of Today -12.000000 Hours

*Show Time Expiring in:

Expiration Date	Number of Hours Expiring	Balance at End of Day

Review Compensatory Time page

The Review Compensatory Time page includes the compensatory time balance as of the date specified. This balance may be positive or negative, depending on how the plan is set up and what has been reported. You can select how far out you want to view compensatory time expiration information by selecting the option from the **Show Time Expiring in** drop-down box. Once you make a selection, the system displays all compensatory time that has an expiration date and that meets those criteria. For example, if you select *Next 30 days*, the system displays all the compensatory time expiring within the next 30 days. If the compensatory time has no expiration date, it doesn't show up here. The **Expiration Date** field displays the date that the employee's reported compensatory time is set to expire. The time expires at midnight of the date specified in this field. The **Number of Hours Expiring** field displays the number of compensatory hours that were originally reported and are set to expire on the date specified in the **Expiration Date** field. The **Balance at End of Day** field displays the compensatory time balance at the end of the date specified in the **Expiration Date** field once the hours have expired.

Overview of Managing Time

The system creates payable time during the Time Administration process. After the Time Administration process applies either user-defined or system-generated rules to reported time, time is either determined as an exception or is converted to payable time. The Payable Time component enables you to view the time after rules have been applied and the time is considered payable. If you need to see how the time was originally reported, you can use the Weekly Elapsed Time Page and the Weekly Punch Time Page. Here you can view the payable time for a single instance of time for an employee or a group.

View Payable Time Summary Page

Usage	Use this display-only page to view the week-by-week summary of reported time by time reporting code.
Object Name	TL_TM_MPAY_SUMM
Navigation	For manager access: Self Service, Manage, View, Payable Time Summary

	For employee access: Self Service, Manage, View, Payable Time Summary
Prerequisites	Time must have been reported and run through the Time Administration process to create Payable Time.
Access Requirements	Enter an employee ID and a start date.

Payable Time From 01/01/2000 To 01/07/2000											
Time Reporting Code	Description	Type	Currency	Sat 1/1	Sun 1/2	Mon 1/3	Tue 1/4	Wed 1/5	Thu 1/6	Fri 1/7	Total Quantity
KUHOL	Holiday (Statutory)	Hours				8.000000					8.000000
KUOVT	Overtime	Hours					1.000000	2.000000	2.000000	2.000000	7.000000
KUREG	Regular Productive Hours	Hours					8.000000	8.000000	8.000000	8.000000	32.000000
Previous Week Next Week Detail Page											

Payable Time Summary page

The Payable Time Summary page displays one week's payable time. The time is broken up by date, then by TRC, and then by task. For example, if your task profile specifies that your time should be allocated 50 percent to one task and 50 percent to another, then you would see 2 rows for the same date and TRC. However, by going to the View Payable Time Details Page, you can view the details on how it is broken up. Click the **Previous Week** button or the **Next Week** button to view a different week's summary of payable time. Click the **Detail Page** button to access the View Payable Time Details Page.



Any time that has generated exceptions will not show up on this page because it is not considered payable time.

View Payable Time Details Page

Usage	Use the Payable Time Detail page to view the details of the payable time. If an employee has reported time and the Time Administration process runs, it is possible that the system still doesn't create payable time. If the system creates exceptions, then it depends on the priority of the exception. Low priority exceptions allow the system to create payable time; however, higher priority exceptions do not.
Object Name	TL_MNG_PAY_DET_VW
Navigation	For manager access: Self Service, Manage, View, Payable Time Details

	- For employee access: Self Service, Manage, View, Payable Time Details - Click the Detail Page button on the View Payable Time Summary Page.
Prerequisites	Time must have been reported and run through the Time Administration process to create Payable Time.
Access Requirements	Select an employee and a beginning date.

Payable Time From 01/01/2000 To 01/07/2000						
*Date	Payable Status	Time Reporting Code	Quantity	Type	Taskgroup	More...
01/03/2000	Needs Approval	KUHOL	4.000000	Hours	KUTSKGRP1	More...
01/03/2000	Needs Approval	KUHOL	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/04/2000	Needs Approval	KUOVT	0.500000	Hours	KUTSKGRP1	More...
01/04/2000	Needs Approval	KUOVT	0.500000	Hours	KUTSKGRP1	More...
01/05/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/05/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/05/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/05/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/06/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/06/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/06/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/06/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/07/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/07/2000	Needs Approval	KUREG	4.000000	Hours	KUTSKGRP1	More...
01/07/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...
01/07/2000	Needs Approval	KUOVT	1.000000	Hours	KUTSKGRP1	More...

Previous Week

Next Week

Payable Time Detail page

The system displays the time reporting code for the time. The employee could have manually entered the TRC or the system could have generated it automatically during time reporting. The system also displays the number of units, amounts, or hours for the TRC. This value must be within the minimum and maximum quantity set for the TRC. The TRC type determines if this value is amounts, units, or hours. The system displays the date of the reported time and the current status of the payable time. The payable status records the progress of payable time through its different stages.



For more information about payable time details, see Payable Time Statuses in the PeopleSoft Time and Labor PeopleBook.

The possible payable statuses are as follows:

<i>Payable Status</i>	<i>Description</i>	<i>When Published</i>
Estimated – Ready for Payroll	This is the first stage of payable time created by the Time Administration process, unless you've activated the Needs Approval option on the Workgroup Page. This status includes cost estimates calculated by the Time Administration process if you've selected the Calculate Estimated Gross option on TL Installation Page. An adjustment made to payable time at this stage replaces the original entry.	Published to systems that subscribe to the Estimates message.
Needs Approval	This stage is like estimated payable time except that the time must be approved before it can be sent to a payroll system. You approve time using the Approve Payable Time Page. An adjustment made to payable time at this stage replaces the original entry.	Published to systems that subscribe to the Estimates message.
Approved – Goes to Payroll	Approved payable time can be sent to your payroll system. When payable time reaches the approved stage, the system sets the frozen indicator. Changes made to payable time in this stage create offsetting entries.	Not applicable.
Closed	Payable status is set to closed when any of the following conditions are met: • The Send to Payroll option is not activated for the time reporter (on the Create Time Reporter page). • The Send to Payroll option is not activated for the time reporting code (on the TRC Setup page). • The payable time represents a record adjustment. • PeopleSoft Payroll has taken the payable time, but it isn't labor distributed or diluted because you did not select the Labor Distribution and Dilution options on the Pay System page. (In this case, you see the Pay System code and Pay Request Number on the View Payable Time Details Page.) Changes made to payable time in this stage create offsetting entries.	Published to systems that subscribe to the Actual message.
Sent to Payroll	Payable time is in a Sent to Payroll status from the moment it's sent to PeopleSoft Payroll to the time Payroll either takes or rejects the entry. Changes that are made to payable time while it is in Sent to Payroll status create offsetting entries.	Not applicable.

<i>Payable Status</i>	<i>Description</i>	<i>When Published</i>
Rejected by Payroll	Time that PeopleSoft Payroll has refused.	Not applicable.
Taken – Used by Payroll	PeopleSoft Payroll has accepted time. The Time Administration process creates offsetting entries whenever you change payable time that has a payable status of Taken – Used by Payroll.	Not applicable.
Paid – Labor Distributed	Time that has actual costs from PeopleSoft Payroll applied by the Labor Distribution process. The Time Administration process creates offsetting entries whenever you change payable time that has a payable status of Paid – Labor Distributed.	Published to systems that subscribe to the Actual message.
Paid – Labor Diluted	Time with actual costs from PeopleSoft Payroll applied by the Labor Distribution process and the Labor Dilution process. The Time Administration process creates offsetting entries whenever you change payable time that has a payable status of Paid – Labor Diluted.	Published to systems that subscribe to the Actual message.

The Payable Time Detail page displays each day's payable time. Click the **Previous Week** button or the **Next Week** button to view a different week's summary of payable time.

Click the **More** link to access the More Payable Time Information Page.

More Payable Time Information Page

Usage	Use this page to display the time reporting and task reporting element details for the payable time.
Object Name	TL_MNGP_DETAIL_S1
Navigation	Click the More link on the View Payable Time Details Page.

More Payable Time Information	
Cynthia Rogers	
Time Reporting Elements	
Date:	01/04/2000
Payable Status:	NA Needs Approval
Taskgroup:	Task Grp for Template & Prfl 1
Time Reporting Code:	Regular Productive Hours
Quantity:	4.000000
TRC Type:	Hours
Billable Indicator:	☐
Currency:	Canadian Dollar
Override Rate:	
Rate Code:	
Country:	
State:	
Locality:	
Task Reporting Elements	
Product:	KUHARD
Customer:	CUST1
Task:	KUCNF
Perf Meas Business Unit:	
Activity ID:	
User ID:	
Publish Switch:	
Publish Date:	
Estimated Gross:	55.000000
Labor Distribution Amount:	
Diluted Labor Distribution Amt:	
Cancel and Return	

More Payable Time Information page



For information about the field definitions, see the Weekly Elapsed Time Detail Page. For more information about how the system handles these values, see Creating Time Reporting Templates in your PeopleSoft Time and Labor PeopleBook.

Viewing Forecasted Payable Time

The Forecast Payable Time feature allows you to get an estimate of what your payable time would be either for the current period, or for some time period in the future. It looks at reported time and/or scheduled time and calculates what the payable time would be for a specified time period using that information.

For example, if you are a manager in a retail store where schedules are constantly changing, and you are concerned about the number of employees you have working overtime. You may want to get an estimate of what the payable time will be for the current period and which employees are

approaching overtime limits. By using the Forecast Payable Time feature, the system will look at how many hours your employees have reported so far in the period, and also what their remaining scheduled hours are. The Forecast Payable page will show you what their estimated payable time will be and from there, you would be able to tell if any of your employees are approaching overtime.

As an employee, an example of how you might use this feature is you may want to estimate what your payable time will be with your new schedule, or after you report vacation hours. By forecasting your payable time for the desired time period, you will be able to see an estimate of what you will be paid.

There are three ways to Forecast Payable time. You can forecast time for a month or for a specific day using the Time and Labor Launch Pad. You can also Forecast time for a period using the Time Administration Run Control. By checking the Forecast Payable Time button on the Time Administration Run Control page, the system will calculate Forecasted Time for the Time Period in which the Process Date is associated with. For more information on forecasting time using the Time Administration Run Control page, see Launching the Time Administration Process.



Forecasted Payable Time is not actual Payable Time. In order to generate Payable Time, you must go through the normal processes to create payable time.

Forecasted Payable Time (Summ) Page

Usage	Use this page to view forecasted payable time in summary. The summary forecast payable time page shows the forecast time by employee and by TRC.
Object Name	TL_TMSPAY_SUMM
Navigation	- For manager access: Self Service, Manage, View, Forecasted Time Summary - For employee access: Self Service, Manage, View, Forecasted Time Summary
Prerequisites	Forecasted payable time must exist for the employee and the date must be specified.
Access Requirements	Employee ID, record number or name, and start date.

Forecasted Payable Time (Summ)

View Forecasted Payable Time Summary
 DUCY Lucy ID: LUTR138
 Job Title: Manager

Forecasted Payable Time From 08/07/2000 To 08/13/2000 [View All](#) < 1 of 1 >

Time Reporting Code	Description	Currency	Mon 8/7	Tue 8/8	Wed 8/9	Thu 8/10	Fri 8/11	Sat 8/12	Sun 8/13	Total Quantity
REG	Regular - Productive		8.000000	8.000000	8.000000	8.000000			8.000000	40.000000

[Previous Week](#)
[Next Week](#)
 Click the Previous or Next button to select the pervious or next week.

Forecasted Payable Time (Summ) page

The Forecasted Payable Time Summary page displays one week's payable time. The system breaks up time based on the TRC and displays the total quantity of hours for each TRC to which time was reported within the date range specified. Click the **Previous Week** button or the **Next Week** button to view a different week's summary of payable time. Click the **Detail Page** button to access the Forecasted Time Detail Page.

Forecasted Time Detail Page

Usage	Use this page to view forecasted payable time details. This page displays the time in detail for 30 days starting from the day the user has selects.
Object Name	TL_MNG_SPAY_DET_PN
Navigation	- For manager access: Self Service, Manage, View, Forecasted Time Detail - For employee access: Self Service, Manage, View, Forecasted Time Detail
Prerequisites	Forecasted payable time must exist for the employee and the date must be specified.
Access Requirements	Employee ID, record number or name. Start and end dates.

Forecast Payable Time (Detail)

View Forecasted Payable Time Details

Ducy Lucy

ID: LUTR138

Job Title: Manager

Forecasted Payable Time From 08/07/2000 To 09/06/2000

View All 1-10 of 23

Payable Status	Date	Time Reporting Code	Quantity	Taskgroup	Type	More...	Perf Meas Business Unit
Estimated - Ready for Payroll	08/07/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/08/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/09/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/10/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/13/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/14/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/15/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/16/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/17/2000	REG	8.000000	LUTREVIEW	Hours	More...	
Estimated - Ready for Payroll	08/20/2000	REG	8.000000	LUTREVIEW	Hours	More...	

Forecasted Payable Time Details page

The fields displayed on this page are the same as those on the View Payable Time Details page. For an explanation of these fields, see the View Payable Time Details Page. The **Approve Date** and **User ID** fields are not displayed on this page as they are on the View Payable Time Details page because you do not need to approve forecasted time.

Click the **More** link to access the Time Reporting and Task Reporting Elements that are associated with the time.

More Payable Time Information Page

Usage	Use this page to display the time reporting and task reporting element details for the forecasted payable time.
Object Name	TL_MNGP_DETAIL_S1
Navigation	Click the More link on the Forecasted Time Detail Page.

More Payable Time Information

Charles Baran

Time Reporting Elements

Date: 08/01/2000
Payable Status: ES Estimated - Ready for Payroll
Approval Process Datetime:
Taskgroup: Task Grp for Template & Prfl 4
Time Reporting Code: Regular Productive Hours
Quantity: 4.800000
TRC Type: Hours
Billable Indicator ☐
Currency: US Dollar
Override Rate:
Rate Code:
Country:
State:
Locality:

Task Reporting Elements

Business Unit: US001
Department: KU016
Position: 19000098
Task: KUSRV
User ID:
Publish Switch:
Publish Date:
Estimated Gross: 426.923078
Labor Distribution Amount:
Diluted Labor Distribution Amt:

More Payable Time Information page



For information about the field definitions, see the Weekly Elapsed Time Detail Page. For more information about how the system handles these values, see Creating Time Reporting Templates in your PeopleSoft Time and Labor PeopleBook.

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