

PeopleSoft 8.3 Time and Labor PeopleBook

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

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 these books, 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 windows, 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 the PeopleSoft system, much of the information in these books 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. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, 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 for HRMS 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 for HRMS* and other PeopleBooks.

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 (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, 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://www4.peoplesoft.com/cc

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 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. 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.

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Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email 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*
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
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.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	*Definition*
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
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.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
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.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	*Definition*
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
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 button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button 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.

Field	*Definition*
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title — Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Prefix and **Name Prefix** — Select a Prefix or Name Prefix, if applicable.

Royal Prefix — Select a Royal Prefix, if applicable.

First Name — Enter the employee's official first name.

Preferred First Name — For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.

Last Name Preference — For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.

Middle — Enter the employee's middle name, if applicable.

Last Name — Enter the employee's official last name.

Suffix — Select a suffix, if applicable.

Second Last Name — For Spanish employees, enter the second surname (mother's surname).

Alternate Character Name — Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters).

Note. You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter.

Warning! Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.

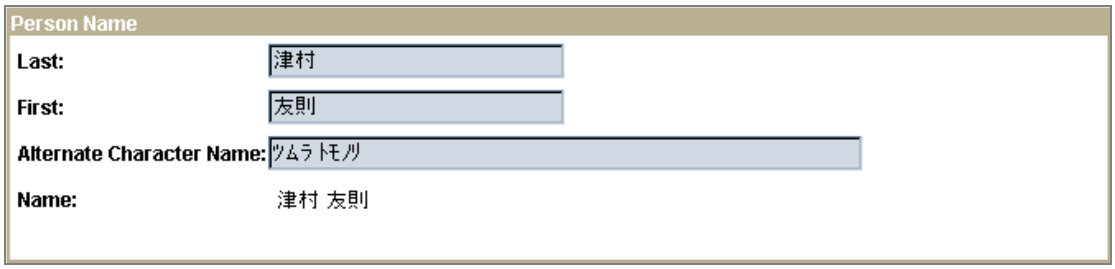
Royal Suffix — Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.

Name — The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type	Enter the house type, if applicable.
Postal Search	Click **Postal Search** to use international address formats.

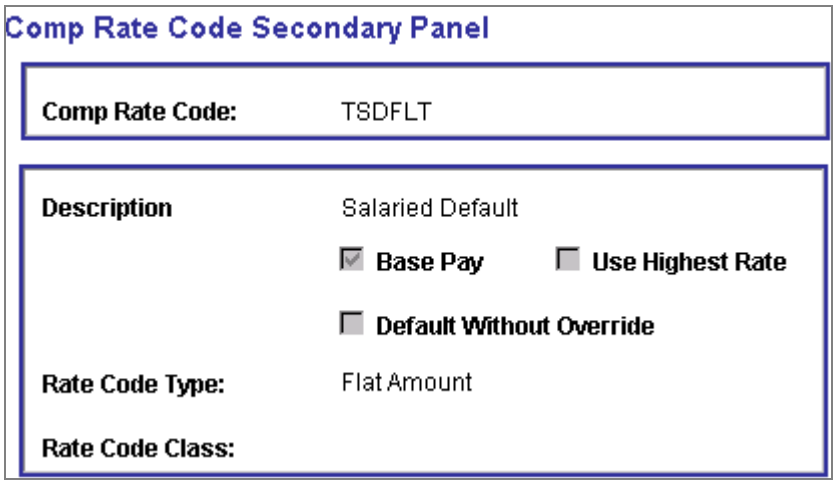
Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code	Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid. **Note.** If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.
Seq (sequence)	The sequence number of the rate code if it is used more than once.
Details	Click the **Details** button to open the Comp Rate Code Secondary Panel page.
Comp Rate, (compensation rate) **Currency**, and **Frequency**	The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.
Apply FTE	If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.
Points	The salary points associated with this rate code, if any.
Percent	If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.
Rate Code Group	A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



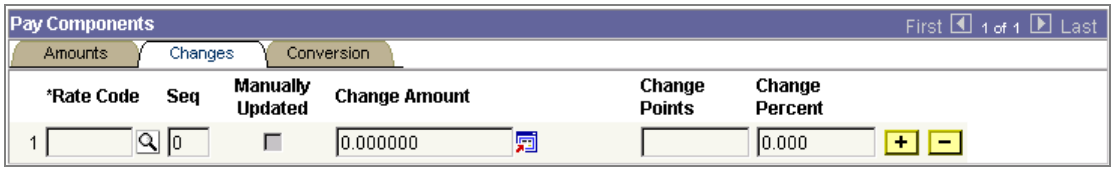
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

Changes Tab



Pay Components – Changes page

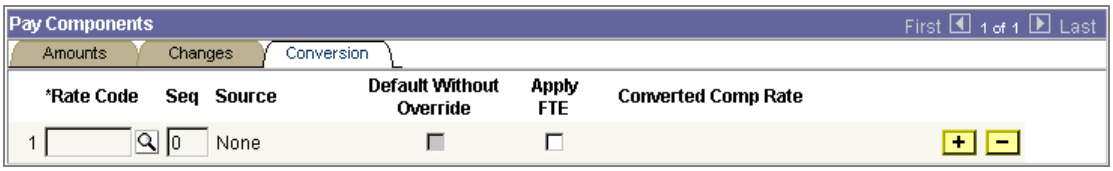
This page displays the change in an employee's salary.

Manually Updated The system selects this if you have manually updated the pay components.

Change Amount The overall change amount to this pay component rate.

Change Points The overall change amount (in points) to this pay component, if applicable.

Change Percent The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

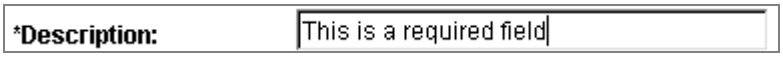
Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.

Converted Comp Rate Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

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.



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:

`monospace font` 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**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
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.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this 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.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	*System Name*	*Navigation*	*Usage*
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

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

About the PeopleSoft 8.3 Time and Labor PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft Time and Labor.

General information you should know before you begin using your PeopleSoft Time and Labor documentation is presented in **About the HRMS PeopleBooks**.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section explains where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

CHAPTER 2

Introduction to PeopleSoft Time and Labor

This chapter provides an overview of the key features and processes of PeopleSoft Time and Labor. These include:

- Time Collection Device Reporting
- Time Administration
- Financial and Analytical Application Interfaces
- Referential Integrity
- Time Validation
- Default Processing

Time Collection Device Reporting

Time Collection Device (TCD) — Reporting time in an *hours: minutes* format, regardless of the technology.

PeopleSoft Time and Labor utilizes Application Messaging technology to support all types of TCDs. The Time Collection Device interface collects clock and elapsed time from, and can send setup data to, any collection device. Setup data, such as employee data, supervisor information, task detail, and restriction rules, is synchronized with the clock system. PeopleSoft Time and Labor supports scheduling, reporting, managing, and applying rules for this time reporting method.

Administering Time

The foundation of PeopleSoft Time and Labor is the Time Administration rules processing feature. The Time Administration feature enables you to create rules for processing time, and apply these rules both online and as part of the Time Administration batch process.

Time Administration provides the following tools for rule creation:

- Templates for the more straightforward rule calculations.
- Actions and Conditions for rules that are more complicated than those defined within a template structure.
- SQL Objects for highly complex rules.
- User Exits to accommodate constructs that cannot be handled through the templates or other tools.

See Also

"Creating Rules in Time Administration"

Financial and Analytical Application Interfaces

To exchange financial and analytical information, PeopleSoft Time and Labor interfaces with:

- PeopleSoft Projects.

  PeopleSoft Application Messaging streamlines setup tables to exchange data efficiently. Project information is synchronized between the PeopleSoft Human resources and PeopleSoft Enterprise Resource Planning databases. Time and Labor publishes messages of labor charges and PeopleSoft Projects accepts messages to update project accounting. Time and Labor subscribes to project and resource definitions for time reporting.

- PeopleSoft Enterprise Performance Management.

The system extracts processed time from PeopleSoft Time and Labor whenever necessary.

See Also

"Integrating With PeopleSoft Financials"

Globalization

You can set up complex time reporting rules specific to a country's customs and regulations. Translated pages and the ability to record money in the desired currency are available.

Background Processing

PeopleSoft Time and Labor provides several batch processes to ensure that data is error-free when information changes 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 for processing time. The following sections provide information about these processes.

Referential Integrity

When you make a change to one object in the system, Time and Labor's Referential Integrity process ensures that the change does not invalidate data in related objects.

RI starts working after you select the In Production check box on the TL Installation page.

The Referential Integrity process:

- Determines impacted reported and payable time and time reporters.

  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 an RI router that determines the effect of changes to reported or payable time for affected time reporters. Only *online* updates trigger RI processing.

- Validates time during Time Administration.

- Creates or resolves exceptions during the Time Administration process.

  When processing data through PeopleSoft Time and Labor, exceptions are created or resolved automatically, and payable time is recalculated as necessary.

- Updates TR status records to reevaluate payable time.

  When processing data through PeopleSoft Time and Labor, RI evaluates changes and reevaluates affected time.

- Disallows the inactivation or deletion of certain records or the change of effective-dated rows.

  The system displays error messages when you try to inactivate, delete, or change an effective-dated row that invalidates the association with another table.

The Referential Integrity process checks for discrepancies and validates time for:

- Time collection device data.
- Time collection groups.
- Time reporter data.
- 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 the Job page.
- The Department table.
- Leave plans.
- The Leave Plan table.

The Referential Integrity process 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 on that page, you receive an error message. For example, you 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.

Message number 13500,103 in the message catalog 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 relationships between target and prompt tables. Changing the effective date on a target table to a date greater than that on the prompt table generates an error.

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

Target Table (Main Page)	*Prompt Table (Table assigned to Main Page)*
Comp Time Plan	Time Reporting Code
Taskgroup	Task Profile
TCD Setup	TCD Type TRC Program Taskgroup
TL Empl Data (Create Time Reporter Data or Maintain Time Reporter Data)	Workgroup Taskgroup TCD Group Rule Elements 1-5
Workday	Shift

Nested Effective-Dated Tables

RI acts upon effective dates throughout the application. It 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. It prevents this from occurring in the following ways:

- When the nested object effective date is greater than the host object effective date, you receive an error message.

  For example, the effective date of the workgroup affects the Maintain Time Reporter Data table; 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, TCD group, and so on.

- The system does not allow you to delete or inactivate a row that is used by another object.

- If you try to inactivate or delete an effective-dated row that uses another effective-dated object, the system verifies that the date does not invalidate the association with 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 that 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 relationship among nested objects. The source table cannot have an effective date greater than the target table.

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 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
Workday	Workgroup
Create/Maintain Time Reporter Data	Comp Plan Enrollment

Understanding Referential Integrity Triggers

When you change an effective-dated setup object, the following events occur:

1. The system determines whether or not that change affects any reported or payable time.

   If a change affects reported or payable time, the system writes a row in a control record to identify the setup change and any validations to be run as a result.

2. The Referential Integrity process triggers the Time Validation process.

   The Time Validation process checks for any reported or payable time that is negatively impacted by the setup change and triggers exceptions for invalid elements. If validation is unnecessary, the Referential Integrity process triggers Time Administration to reprocess payable time that is affected by the setup change.

3. When Time Administration runs, it initiates a separate process of RI review.

RI determines whether any rows exist in the control record to identify setup changes. If rows exist in the control record, RI determines which time reporters are affected by each change in the record. The affected time reporters will:

- Have their Time Administration status changed so they are 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 setup table change.
- Have the Time Validation process run against reported time that is equal to or greater than the new earliest change date.

4. Time Administration continues processing.

   The process runs rules, runs Time Administration Validation, and creates payable time based on the updated earliest change date.

Example

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 review. If the TRCs reported during this time period do not exist in TRC Program B, the system generates exceptions on the invalid time. Change the TRCs associated with that time or adjust the TRCs in TRC Program B to resolve these exceptions.

Note. For RI to correctly trigger changes to JOB Data, the DEPT_SYNC message must be active on the ENTERPRISE_SETUP message channel, which is delivered with PeopleSoft Application Messaging.

See Also

"Appendix D: Referential Integrity"

PeopleSoft Enterprise Integration PeopleBook

Time Administration and Referential Integrity

Time Administration does the following:

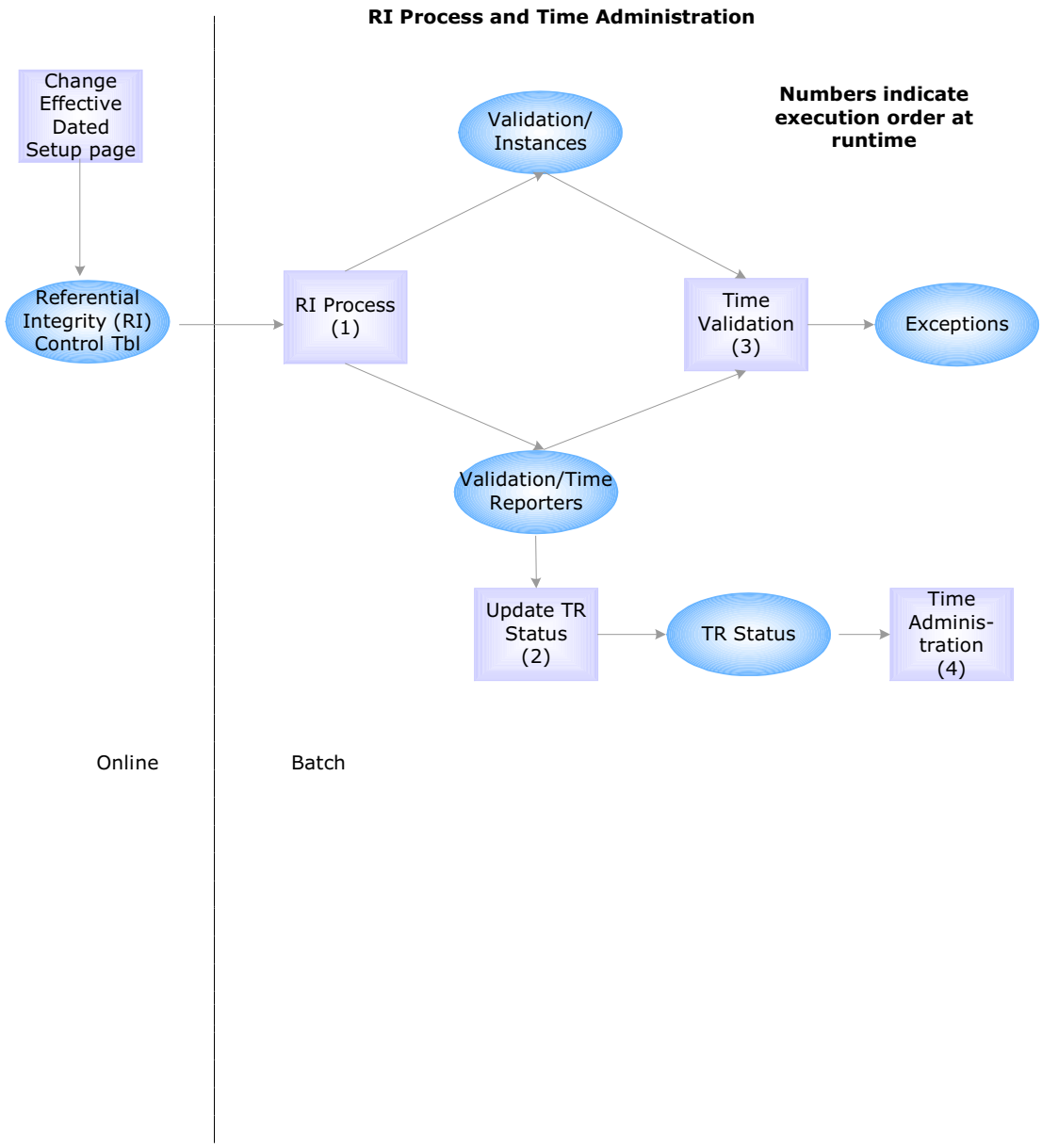
- Provides the tools to create, maintain, and apply the organization's compensation, task, and exception rules to reported and scheduled time.
- Validates instances of reported time and generates payable time.
- Creates exceptions.
- Uses RI to check for setup changes that may affect processed time.
- Verifies that changes, either system- or user-generated, do not negatively affect the system or create errors related to reported or payable time.
- Processes its validations before creating payable time.

  These include compensatory time, leave, TRC, task, and time reporter status validations. This ensures that the payable time is valid.

If you do not include the delivered validation definitions in your validation set, validations against reported time are not included in the Submit Time process.

Note. Time Administration calculates payable time for only those time reporters defined in the run control for Time Administration. The Referential Integrity process updates the earliest change dates for time reporters defined in the run control. However, any other affected time reporters excluded from the current Time Administration run are reprocessed in the next Time Administration run with these time reporters.

The following graphic provides a high-level view of the Referential Integrity process and Time Administration:



Referential Integrity Process and Time Administration

See Also

Understanding Validating Time

Creating Rules in Time Administration

Understanding Batch Processing in Time Administration

Understanding Validating Time

Time Validation is a background process run in three situations:

- When time is submitted.

  The Submit Time processes initiate the first run of Time Validation. The system validates TRCs; time reporter status; and task, compensatory time off, and leave data. Data coming from a TCD, Mass Time, Global Payroll Absence Entry, or Rapid Entry initiates the Submit Time process.

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

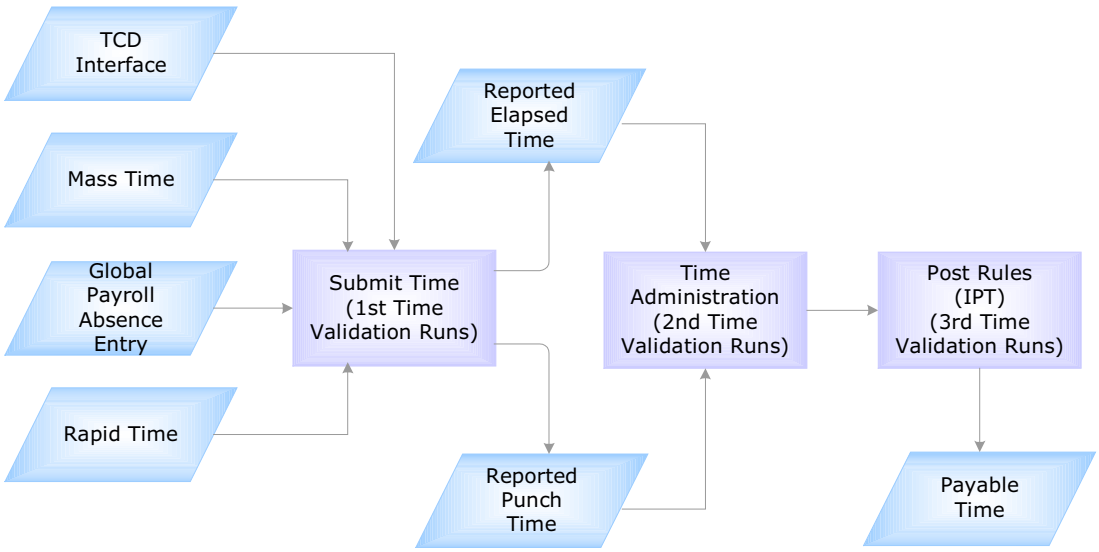
  Time Administration initiates the second run of the Time Validation process, which validates effective date changes in the RI control table.

- When Time Administration creates intermediate payable time.

  This is considered postrules validation. Rules are applied, but payable time is not yet created. Time Administration initiates the third run of the Time Validation process, which checks for changes that the rules may have caused and again validates TRCs; time reporter status; and task, compensatory time off, and leave data.

The following graphic depicts the validation flow:

Validating Time



Validating time process flow

Online Validations

The Time Validation process acts upon the following pages when you enter data online.

Time Capture Device	The system displays an error message when you delete or inactivate an effective-dated row on a TCD group that is assigned to a time reporter. The system displays 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 displays an error message when you inactivate a time reporter who has reported payable time on or after the inactivation date. It also displays an error message when you delete a row that invalidates the time reporter's association with a compensatory time off plan if the Use Workgroup Default check box is cleared on the TL Installation page.
Time Reporting Code	The system displays an error message when you map an earnings type that is invalid for the TRC type. The system displays an error message when you delete or inactivate an effective-dated row on a TRC used by a TRC program or a compensatory time off plan.
TRC Program	The system displays an error message when you delete or inactivate an effective-dated row on a TRC program used by a workgroup or TCD.
Workgroup	The system displays an error message when you delete or inactivate an effective-dated row on a workgroup assigned to a time reporter on the Create Time Reporter Data or Maintain Time Reporter Data pages.
Taskgroup	The system displays an error message when you delete or inactivate an effective-dated row on a taskgroup assigned to a time reporter or a time collection device.
Task Profile	The system displays an error message when you delete a taskgroup profile assigned to an employee, or if a time reporter has positively reported time to the taskgroup profile.
Comp Time Plan (compensatory time plan)	The system displays an error message when you inactivate a compensatory time plan assigned to a time reporter on the Comp Plan Enrollment (compensatory plan enrollment) page.
Rule Program	The system displays an error message when you delete an effective-dated row on a rule program that is associated with a workgroup.

Rule Elements 1-5 The system displays an error message if you inactivate or delete a row.

Batch Validations

For a list of validations performed during the Submit Time and RI processes, see Appendix B: Exceptions and Validations

Updating Time Reporter Status

The system updates the Time Reporter Status table for all time reporters whose payable time must 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 the Time Validation process runs and finds errors with time, it creates exceptions that you can view, resolve, or allow using the Manage Exceptions pages. The action to take depends on the exception criteria setup. There are many system-delivered validations and exceptions; you can also define custom exception definitions and validation sets.

See Also

Appendix B: Exceptions and Validations

"Setting Up Basic Tables," Defining Exceptions

"Setting Up Basic Tables," Defining PeopleSoft Application Engine Sections

Default Processing

Default processing The order in which the system processes field values.

Time and Labor enables you to define some fields in more than one area. This flexibility enables a high-level association of time reporters to common values that makes sense for a given grouping. The system processes these field values using default processing to control the order in which they are resolved.

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

Time Periods

Assign a 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 Time Reporter Data or Maintain Time Reporter Data pages. The system:

1. Checks the period ID at the time reporter level.
2. Checks for the period ID at the workgroup level if the field is cleared at the time reporter level.

Time Reporting Templates

Assign a default time reporting template at the taskgroup level. You can override this template at the time reporter level by defining a time reporting template ID on the Create Time Reporter Data or Maintain Time Reporter Data pages. These templates contain the fields that are viewable when reporting punch or elapsed time. The system:

1. Checks for a time reporting template at the time reporter data level.
2. Checks for the time reporting template at the taskgroup level if the field is cleared.

Punch Restriction Profiles

Define values for the punch restriction profile on the TCD Group table or for an individual time reporter on the Create Time Reporter Data or Maintain Time Reporter Data pages. When the time collection device interface is processing, it searches:

1. For a profile at the time reporter data level.
2. For the restriction profile at the TCD Group table level if nothing is assigned.

Taskgroups

Assign a taskgroup to a time reporter using the Create Time Reporter Data 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 can override the taskgroup by reporting to another task template or task profile. Also, a time reporter can be scheduled to another (borrowed) taskgroup for the day.

The system checks for positively reported changes to the borrowed taskgroup and then to the assigned taskgroup.

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

Task Profiles

There are four ways that the system derives task profiles for task processing:

- Every taskgroup has a default task profile.
- A task profile is assigned to the time reporter.
- The time reporter positively reports to a task profile from a list of valid profiles for the taskgroup.
- A task profile is overridden through scheduling by importing information from a third-party system.

The system searches for task profiles in the following order:

1. Positively reported task profiles.
2. Scheduled task profiles.
3. The default task profile from the employee data level.
4. The time reporter's taskgroup default task profile.

Holiday Schedules

Choose a holiday schedule on the Job Data 2 page, or assign a holiday schedule to a workgroup. The system checks:

1. The job data.
2. The holiday schedule associated with the assigned workgroup for the time reporter.

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 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 the TCD must be consistent. If there are TRCs in the TRC program at the TCD that are invalid in the TRC program on your workgroup, the system creates exceptions and the time is not payable.

TCD Groups

Assign time reporters to TCD groups using the Create Time Reporter Data or Maintain Time Reporter Data pages (optional). The TCD Interface process resolves the TCD groups associated with the time reporters and sends data to the correct TCDs to define security access. This data is not necessary for processing time within the PeopleSoft Time and Labor system.

State

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 imported from a third-party scheduling system. The system:

1. Checks whether the time reporter has reported an override state for a given instance of time.
2. Checks whether a state is associated with a TCD to which the time reporter is reporting.
3. Checks for a schedule override.
4. Uses the default state on the employee tax data record for payroll processing if it finds no reported or scheduled state.

Location

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 imported from a third-party scheduling system. The system:

1. Checks for a reporting-level override.
2. Checks for a schedule override.
3. Uses the default location if it finds no reported or scheduled location.

Locality

Assign a locality to an employee on the Local Tax Data page. In addition, you can associate a locality to a TCD for time imported from the TCD. You can override this locality by positively reporting a locality during time reporting or by using a value imported from a third-party scheduling system. The system:

1. Checks for an override at the reporting level.
2. Checks for a locality associated with the TCD to which the time reporter reports if there is no positively reported locality.
3. Checks for a schedule override.
4. Uses the default locality for any payroll processing if it finds no reported or scheduled locality.

Country

Assign a country to an employee on the Personal Data 1 page. You can override the country during positive time reporting or by using a value imported from a third-party scheduling system. In addition, a country can be associated with a TCD for time imported from the TCD. The system:

1. Checks for an override at the reporting level.
2. Checks for a country associated with the TCD to which the time reporter reports if there is no positively reported country.
3. Checks for a schedule override.

4. Uses the default country for payroll processing if it finds no reported or scheduled country.

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 with a TCD for time imported from the TCD. The system:

1. Checks for a positive time reporting time zone override.
2. Checks for a time zone associated with the TCD to which the time reporter reports if there is no positively reported time zone.
3. Uses the base time zone on the PeopleTools Options page if no other time zones are reported.

Rate

Override this rate during positive time reporting by importing a value from a third-party scheduling system or by defining a rate on the TRC. The system:

1. Checks for an override at the reporting level.
2. Checks for an ad hoc schedule override.
3. Checks for a rate on the related TRC if neither an override nor an ad hoc schedule exist.
4. Uses the default compensation rate on the Job page to calculate the estimated gross if it finds no reported, scheduled, or TRC rate.

Rate Code

Enter a rate code during positive time reporting. Rate codes can also be imported from a third-party scheduling system. The system:

1. Checks for an override at the reporting level.
2. Checks for a schedule override. If one exists, the system uses it to calculate 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 the Employee Compensation table. Enter rate codes from any of these tables on the paysheets. When the Pay Calc (pay calculation) process runs, the system checks for the rate code on:

1. The Employee Compensation table.
2. The Job Code table.
3. 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 the reported quantity to the flat amount. The delivered rules update the reported quantity to the Flat Amount for the TRC.

The system uses what is reported positively on the Weekly Elapsed or Weekly Punch Time pages for the quantity. If no quantity is reported, the system uses the scheduled quantity. For more information about how the system handles reported quantities, see the "Establishing Time Reporting Codes" chapter.

Currency

Define the base currency for a time reporter on the Job Data 1 page during the hiring process. You can also define a currency for the time reporter when establishing an amount type TRC, or override the reported currency for an amount type TRC. In addition, you can override the currency with a value imported from a third-party scheduling system. The system:

1. Checks for a positively reported currency for an amount type TRC.
2. Checks for a currency code on the TRC definition in the TRC table if no reported or scheduled currency code exists.
3. Uses the default base currency on the time reporter's job record if no currency codes exist.

Schedule ID

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 there is a workday override for a day, that workday override takes precedence over any long-term schedule assigned to that day. If there is any third-party schedule information for a day, that information takes precedence over the:

- Long-term schedule assigned to the day.
- Workday override scheduled for the day.

Rule Elements

Assign up to five rule elements on the Create Time Reporter Data and Maintain Time Reporter Data pages. You can override rule elements during positive time reporting or by using a value imported from a third-party scheduling system. The system:

1. Checks for an override at the reporting level.
2. Checks for a schedule override.
3. Uses the default rule elements if no reported or schedule rule element is found.

Time Reporting Code 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.

See Also

"Establishing Time Reporting Codes"

CHAPTER 3

Setting Up Basic Tables

This chapter provides an overview of implementing PeopleSoft Time and Labor and discusses how to:

- Set up system defaults and load dates.
- Establish payroll system options.
- Establish time periods.
- Build and view calendars.
- Establish compensatory time plans.
- Define exceptions.
- Define PeopleSoft Application Engine sections.
- Define validation criteria.
- Define override reason codes.

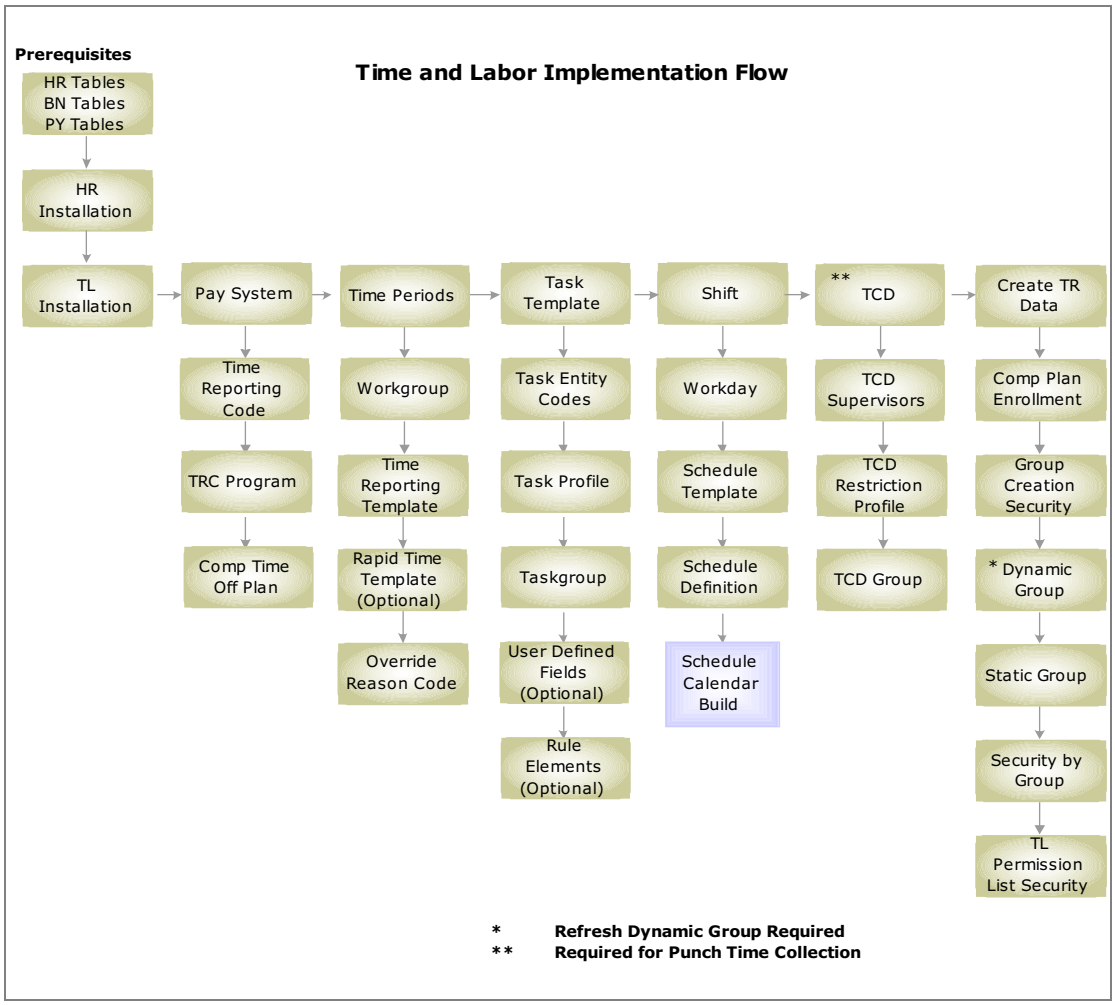
Understanding Time and Labor Implementation

To implement Time and Labor, you must set up the following tables, processes, and features:

- PeopleSoft Human Resource tables.
- PeopleSoft Benefits tables.
- Time Zone Offsets table.
- Concurrent online processing.
- Time periods.
- Periods and period instances.
- Calendars.
- Compensatory time plans.
- Exceptions.

- PeopleSoft Application Engine sections.
- Validation criteria.

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



PeopleSoft Time and Labor Implementation Flow

PeopleSoft 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 and data used by Time and Labor include the Company, Location, Department, Compensation Rate, Job Code, and Pay Group tables.

The following table shows how PeopleSoft Time and Labor uses data extracted from Human Resources.

Business Units	Used for task reporting in PeopleSoft 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 PeopleSoft Time and Labor.
Location	Used for task reporting in PeopleSoft Time and Labor.
Department	Used for task reporting in PeopleSoft Time and Labor.
Job Code	Used for task reporting in PeopleSoft 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 time reporting codes (TRCs).
Holiday Schedule	Used for scheduling and rule processing.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Regulating HRMS System Data," Determining Your Business Unit Structure and Understanding TableSets.

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Companies, Agencies, and Locations," Entering Company Information, Establishing Locations, and Maintaining Departments.

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Jobs and Pay Groups"

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," Setting Up Multiple Components of Pay

PeopleSoft Human Resources PeopleBook: Monitor Absence, "Setting Up Absence Data," Setting Up and Assigning Work and Holiday Schedules

PeopleSoft Benefits Tables

Benefits tables store leave plans and accrual balances. PeopleSoft Time and Labor uses benefits tables for determining leave accrual balances. These tables include the Benefits Plan and Leave Plan tables. Set up these tables, in the following order, before setting up your PeopleSoft Time and Labor tables.

1. Define all benefit plans by plan type, with vendor and group information.

2. Define the accrual rules for that plan on the Leave Plan table.

Leave Plan Table

To set up your leave plan, use the Leave Plan Table page. The Leave Plan table contains the service and accrual processing rules for a leave plan. The following steps must occur:

1. Selected Time and Labor on the Installation table.

2. Select the Allow Negative Balance check box on the Manual Accrual Processing section of the Leave Plan Table page.

   The Max Negative Hours Allowed field becomes available.

3. 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.

Note. Any changes you make to the Allow Negative Balance or the Max Negative Hours Allowed check boxes will trigger referential integrity processing 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 to ensure that unpaid leave time is not invalidated.

See Also

"Understanding Batch Processing in Time Administration," Step 9- Perform Post-Rules Processing, Check Leave and Comp Time Balances

Time Zone Offsets Table

PeopleTools *stores* time/date information in only one time zone—the "Base Time Zone" you select at the time of installation. 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 for storing all reported time.

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.

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.

See Also

PeopleTools PeopleBook

Concurrent Batch Processing

Using PeopleTools, you can control the number of batch application engine processes—such as the Time Administration batch process—that can run concurrently.

To increase the number of concurrent batch processes, use the Process Scheduler's Server Definition page to update the Max Concurrent field for Application Engine. (Navigation: PeopleTools, Process Scheduler Manager, Use, Server Definitions.) You may also need to update the MAX API Aware field. The PeopleTools PeopleBook provides instructions for updating these fields.

See Also

PeopleTools PeopleBook: Process Scheduler, "Process Scheduler Development"

Concurrent Online Processing

In addition to the Time Administration process, which runs in batch mode, PeopleSoft Time and Labor includes the following online processes that are invoked from PeopleCode with the Call AppEngine function:

Online Process	***Page and Button or Field That Invokes Application Engine Processing***
Apply Online Rules	Weekly Punch Time page; Apply Rules button Weekly Elapsed Time page; Apply Rules button
Submit Time	Mass Time page; Save button Rapid Time page; Submit button

Online Process	*Page and Button or Field That Invokes Application Engine Processing*
Resolve Exceptions	Manage Exceptions; Clean Up Exceptions button Manage Group Exceptions; Clean Up Exceptions button
Load Dates	TL Installation page; Load Dates button
Comp Plan Assignment Update	Create Time Reporter Data; Workgroup field change Maintain Time Reporter Data; Workgroup field change Workgroup Page, Comp Time Plan change
Forecast Payable Time	Time and Labor Launch Pad; Forecast Payable Time button

Multiple users can run online processes concurrently. The maximum number of concurrent processes depends on how many instances or images of the temporary tables are dedicated to online processing. Using the PeopleTools Options page you specify:

- The total number of instances you want the system to create for each temporary table (default = 3)
- The number of temporary table instances to create for online processes (default = 3)

Note. Application Engine programs are delivered to share temp tables; online processing requires dedicated temp tables.

When selecting the number of temporary table instances, keep in mind that a higher number increases the number of simultaneous users, but can also increase the consumption of disk space considerably.

Example

Assume that you use the default settings for the temporary tables, as previously described. According to these settings, three users can run online processes concurrently. So what happens if five users launch online processes simultaneously? The system runs the processes for the first three users, and as soon as temporary tables dedicated to online processing become available, runs the fourth, and then fifth processes.

See Also

PeopleTools PeopleBook: Data Management, "PeopleTools Utilities," System Settings

PeopleTools PeopleBook: Application Engine, "Advanced Development," Using Temporary Tables: Specifying the Number of Temporary Tables

Time Periods

You can define five types of periods in PeopleSoft Time and Labor: daily, weekly, monthly, complex, and 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. Periods have the following uses in the PeopleSoft Time and Labor system:

Time Reporting

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. Align these time periods to your pay period, billing cycle, or fiscal period. Although you can define as many as five different types of periods using the Time Period pages, only three types of periods are for time reporting purposes: daily, weekly, and monthly. Two additional periods' types—complex and repeating—are for rules creation.

Determining Periods to Process

PeopleSoft Time and Labor uses time periods, identified by the time period ID on each time reporter's workgroup, to help determine the correct time periods to process (and pass to Payable Time) when you run the Time Administration process. To determine the correct weekly periods to process, Time and Labor looks to the period ID associated with the time reporter's workgroup.

Determining Rule Application

Time periods determine the range of dates to which a rule applies. For example, for a rule program containing a daily, weekly, and monthly rule, build a calendar containing the periods to which each of these rules applies. For each rule period (daily, weekly, and monthly), define the corresponding calendar period containing the data needed to process the rule.

When defining calendar periods to correspond to rule periods, use the same period types used in time reporting (daily, weekly, monthly). In addition, define repeating and complex period types to use in connection with complex and repeating rule periods. For example, consider 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 four hours plus the time he or she actually reports for
the day.
```

For this rule to work, identify the last Sunday in April by creating a complex period. Otherwise, the system will not know which day to look at.

Tracking Attendance

For attendance tracking in PeopleSoft Time and Labor, specify the time periods for which to track absences, late punches, early departures, and so forth (for example, late punches in a day, absences per week). Use the three time-reporting period types for tracking attendance.

Determining Current and Prior Period Time

Periods help the system distinguish between prior and current period time (time entered for periods that have 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 report 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, uses the time period on the workgroup to distinguish current from prior period time.

See Also

Establishing Time Periods

"Creating Rules in Time Administration," Defining Attendance Programs

Creating Rules in Time Administration

Understanding Batch Processing in Time Administration

Periods and Period Instances

To define a time period:

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

Note. 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.

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. The definition of time and frequency is separate from the time period calendar to make reusing time periods easy and to provide maximum flexibility during setup. Below are examples of potential time and frequency data:

Begin Date	*End Date*	*Frequency*
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.

   Generate actual "instances" of period types on a calendar by running the Build Time Period Calendar Process. For example, a defined a weekly period begins on Monday and ends on Sunday. This period doesn't exist in the system until instances of it are generated on a calendar. To create periods based on your period definition:

   a. Define the start and end dates of your calendar. (for example, 1 February 2000 to 1 February 2001).

   b. Specify the period types to include (daily, weekly, monthly, and so on).

   c. Generate actual periods by running the Build Time Period Calendar process.

3. Define additional components.

Time Periods Used in the Definition of:	*Where Used:*
Workgroups	If the period is a time reporting period, link the period, by its time period ID, to a workgroup on the Workgroup page. Or, 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.
Rules	If the period is used to define a time segment for rules processing, link it, by its time period ID, to the rule on the Define Rule Header page.
Attendance Tracking	If the period is an attendance-tracking period, link it, by its time period ID, to the definition of the attendance program on the Attendance Program page.

See Also

Establishing Time Periods

Building and Viewing Calendars

Calendars

After defining time periods, launch the Build Time Period Calendar process to create instances of these periods for a week, a month, or years. The Build Time Period Calendar process:

- Builds time period calendars using the specified start and end dates.

  These dates do not have to correspond to pay period begin and end dates.

- Enables you to select the time periods to be included in the calendar build process.

- Provides the option to rebuild calendars to change or delete your time period definitions.

- Enables you to update an existing calendar to expand (or contract) the calendar range (that is, to change the start and end dates of the calendar while preserving existing time period definitions).

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

See Also

Building and Viewing Calendars

Compensatory Time Plans

PeopleSoft Time and Labor enables you to define compensatory time plans. Compensatory time plans provide the ability to administer time off instead of pay. Unlike other leave accruals, where PeopleSoft Time and Labor uses the employee's leave balance records maintained in PeopleSoft Benefits to determine leave availability, compensatory time is administered entirely within PeopleSoft Time and Labor. The system maintains each instance of a time reporter's earned compensatory time and the quantity and date earned. This gives you the ability to set expiration periods for individual instances of earned compensatory time.

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

See Also

Understanding Batch Processing in Time Administration

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 PeopleSoft Time and Labor message sets in the message catalog. Defining exception conditions gives 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. If you choose to have the exception archived, you can run a query on resolved exceptions to track trends. 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).

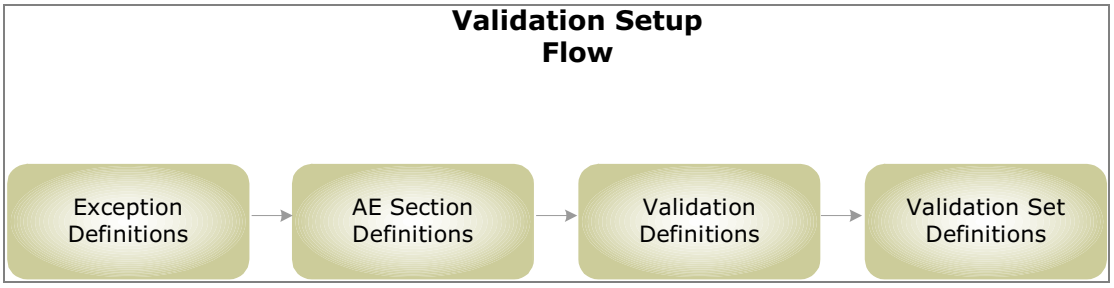
Almost all of the system-delivered exceptions have an exception severity of *High* and are defined as *Not Allowable.* These exceptions must be resolved before the Time Administration process creates payable time. You can change the severity and the allowable flag for system-delivered exceptions.

Exceptions that begin with *TLX* work with delivered attendance tracking and validations. 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, compensatory 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, create a validation set and define which validation definitions 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 PeopleSoft Application Engine 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 the system can generate exceptions and perform validations during processing.



Validation setup flow

To establish user-defined exceptions, set up PeopleSoft Time and Labor messages in the message catalog using PeopleTools.

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Understanding Validating Time

Application Designer PeopleBook

PeopleSoft Application Engine Sections

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

See Also

Defining Exceptions

PeopleTools PeopleBook: Application Engine

Validation Criteria

For the validation process, the system determines the validations to be processed and retrieves the related PeopleSoft Application Engine section names. Each validation definition specifies the Application Engine section name that implements the validation. Control is returned to the Process Validations function upon completion and the system calls the next PeopleSoft Application Engine section.

PeopleSoft provides some validations, which have the 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—small groups of validations—in which you can specify which validations the system processes.

See Also

Defining PeopleSoft Application Engine Sections

Setting Up System Defaults and Loading Dates

This section covers:

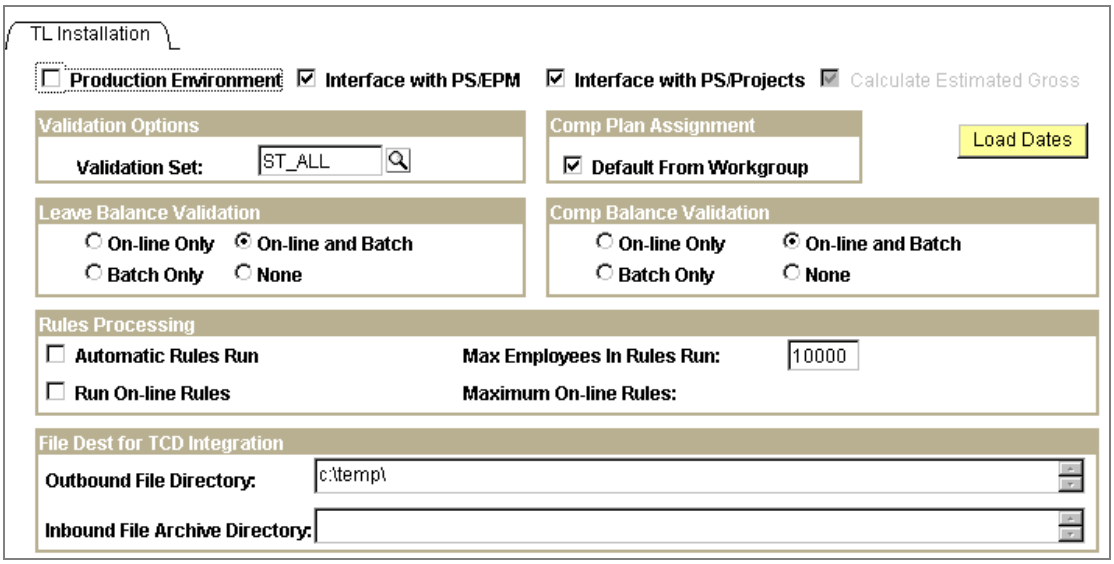
1. Setting up general system defaults and activating specific features.
2. Loading dates.

Pages Used to Set Up System Defaults and Load Dates

Page Name	Object Name	Navigation	Usage
TL Installation	TL_INSTALLATION	Define Business Rules, Define Time and Labor, Setup 1, Installation Options	To set up general system defaults and to activate specific features for your PeopleSoft Time and Labor application.
Dates Table Load	TL_DATE_LOAD	Click the Load Dates button on the TL Installation page.	To load dates into your PeopleSoft Time and Labor system when you implement the system and each time you approach the end of the load period.

Setting Up System Defaults

Access the TL Installation page.



TL Installation page

Production Environment Select to indicate that the system is no longer in a testing environment. Use this check box to test the production functionality of the referential integrity processing, to test the ability to change task templates and rules, and to understand exactly how the system responds in production. This check box controls whether the Time Administration process 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 **Production Environment** check box is selected or cleared.

Production Environment Check Box: Selected vs. Cleared

Process	*What Happens When Production Environment Check Box Is Cleared or Selected*
Time Administration	Cleared: A warning message indicates that the system is not in production and the Referential Integrity process will not be called from the Time Administration process. Selected: No warning message.
Task Templates	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 change the task template by adding optional task elements or changing required elements to optional.
System Date/TL Security	Cleared: You can select the system date so that it appears on the Row Security Permission List page. This option enables a testing environment in which various users access the same database and enter different system dates to test different time frames. Selected: The System Date field does not appear on the Row Security Permission List page.

Process	*What Happens When Production Environment Check Box Is Cleared or Selected*
Referential Integrity	Cleared: No referential integrity processing for changes to effective-dated tables. Normally, this involves reevaluating reported and payable time, and creating exceptions for all affected time. Selected: Referential integrity processing occurs as necessary. **Note.** During nonproduction times, the system doesn't need to perform referential integrity checks because setup tables will change often, and the reported time is not real.
Rule Objects	Cleared: All rule objects can be changed. Selected: No rule objects can be changed.

Calculate Estimated Gross Clear for the system to not calculate estimated gross for all instances of time. This checkbox is selected by default. If you clear this check box, all future instances of time lack the estimated gross calculated during the Time Administration process. If there is payable time with estimated gross attached that you don't want, rerun the Time Administration process.

You can view the estimated gross by TRC for the time reporter by accessing the Payable Time pages. After a payroll is run, the system distributes the actual gross back to PeopleSoft Time and Labor during the Labor Distribution process.

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

Load Dates When you click this button, the system accesses the Dates Table Load page, where you can determine the range of dates to use for time-reporting purposes.

Validation Options

Validation Set

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

Comp Plan Assignment

Default From Workgroup

Select for the system to automatically populate the Comp Plan Enrollment page with the compensatory plan associated with the workgroup of a time reporter. If you select this check box, you can't:

- Override the compensatory plan assignment on the Comp Plan Enrollment page.
- Delete or inactivate the compensatory plan on the Comp Plan Enrollment page.

The compensatory plan is controlled by the association of the workgroup to the time reporter.

You can alter the compensatory plan association for the time reporter in two ways:

- Change the workgroup associated with the time reporter on the Maintain Time Reporter data page.
- Change the compensatory plan associated with the time reporter's workgroup.

The system will automatically update the compensatory plan association accordingly.

If you don't select this check box, you can enter any number of rows on the Comp Plan Enrollment page and inactivate any of the compensatory plans. You can't delete a row on the Maintain Time Reporter data page if it inactivates an association to a compensatory plan. Inactivate the association of the compensatory plan to the time reporter on the Comp Plan Enrollment page; then delete the row on the Maintain Time Reporter Data page.

Important! You can only change this option once. The system doesn't enable changing this value back and forth because:

- When you clear this field, the system deletes compensatory plan rows on the Comp Plan Enrollment page.

- The system derives the workgroup's compensatory plan from the association defined during the Create Time Reporter Data setup.
- If you change this value again, any compensatory plan balances could be invalidated due to the changes in the compensatory plan associations and the TRCs assigned to the compensatory plan.

Leave Balance Validation

On-line Select for the system to validate leave balances only when entered during online processing.

Batch Select for the system to validate leave balances only during batch processing of rules or validating time.

On-line and Batch Select for the system to validate leave balances during online and batch processing.

None Select for the system not to validate leave balances.

If you change the validation option, all processed time is date effected accordingly. All time processed prior to the change may need to be reevaluated because leave balances have been processed and exceptions created.

Comp Balance Validation

On-line Select for the system to validate compensatory balances only when entered during online processing.

Batch Select for the system to validate compensatory balances only during batch processing of rules or when validating time.

On-line and Batch Select this option for system to validate compensatory balances during online and batch processing.

None Select this option for the system not to validate compensatory balances.

If you change these values, all processed time is date effected accordingly. All time processed prior to the change may need to be reevaluated, because compensatory time has already been processed, and exceptions will be created.

Rules Processing

Automatic Rules Run — Clear for the system not to automatically run the Time Administration process following the Submit Time process. 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 processed by Submit Time will also be will processed by Time Administration to create payable time. The only exception is Global Payroll absence entries, which automatically process from the Submit Time process through the Time Administration process.

Max Employees in Rules Run (maximum employees in rules run) — Enter the number of employees for the system to process at a time when running rules (Time Administration process). The number controls system performance during batch processing. The default value is ***100.***

Run On-line Rules — Select to activate the online rules feature. This feature enables you to define online rules and launch an online process (from the Weekly Punch Time and Weekly Elapsed Time pages) that immediately applies the rules to a time reporter's time.

Maximum On-line Rules — To limit the number of online rules that the online process applies, complete the **Maximum On-line Rules** field. The number that you enter determines the maximum number of online rules that you can add to a rule program. (The default value is 5 when you select the Run On-line Rules check box.)

File Dest for TCD Integration

Outbound File Directory — Enter the directory path for the TCD outbound flat files created by application messaging. These files are sent to your time collection device. Your path must end with a backslash (\). This directory is for flat file TCD integration only.

Inbound File Archive Directory — Enter the path for the TCD inbound flat file data to be archived after the inbound file process reads 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.

See Also

"Creating Rules in Time Administration," The Online Processing Component and Adding Rules to a Rule Program

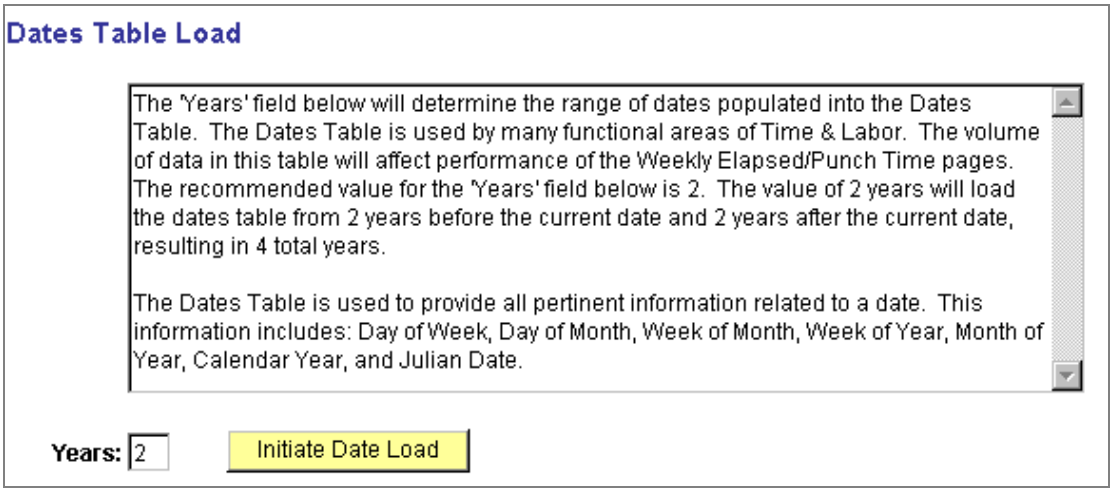
"Introduction to PeopleSoft Time and Labor," Background Processing, Understanding Validating Time

"Establishing Workgroups"

"Using Time Collection Devices (TCDs)"

Loading Dates

Access the Dates Table Load page.



Dates Table Load page

Years — Enter the number of years for 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 two years backward and two years forward. The maximum number of years to enter is ***10.***

Important! Towards the end of the period you specify, be sure to load the next set of dates.

Initiate Date Load — Click to load dates into the system.

Return — Click to return to the TL Installation Options page.

Payroll System Options

This section covers:

1. Establishing the type of payroll system to use with PeopleSoft Time and Labor.

   The delivered system contains both PeopleSoft Global Payroll and North American Payroll.

2. Choosing labor distribution for the costs retrieved from the payroll system

3. Choosing labor dilution.

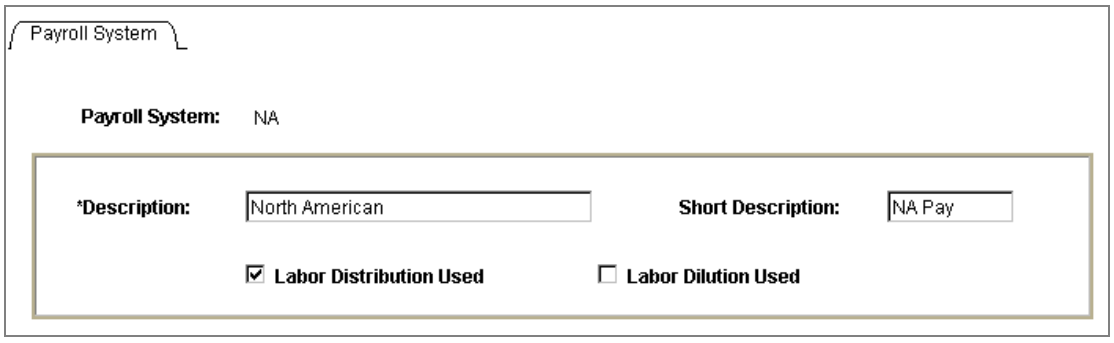
   Labor dilution is the breakout of costs to the original time entered.

Page Used to Establish Payroll System Options

Page Name	*Object Name*	*Navigation*	*Usage*
Payroll System	TL_PAYSYS_PNL	Define Business Rules, Define Time and Labor, Setup 1, Pay System, Payroll System	To establish the payroll system to use and to choose labor distribution and labor dilution.

Establishing Payroll System Options

Access the Pay System page.



Payroll System page

Labor Distribution Used Clear to disable PeopleSoft Time and Labor's labor distribution. The check box is selected by default. 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 other applications.

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

Labor Dilution Used Clear to disable PeopleSoft Time and Labor's labor dilution feature. The checkbox is selected by default. When selected, Time and Labor dilutes distribution to account for time that is paid at different rates, and dilutes labor distribution across all hours, regardless of whether an employee was paid for the time.

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

See Also

"Integrating With Payroll Applications"

Establishing Time Periods

This section covers how to set up the following time periods:

- Daily
- Weekly
- Monthly
- Complex
- Repeating

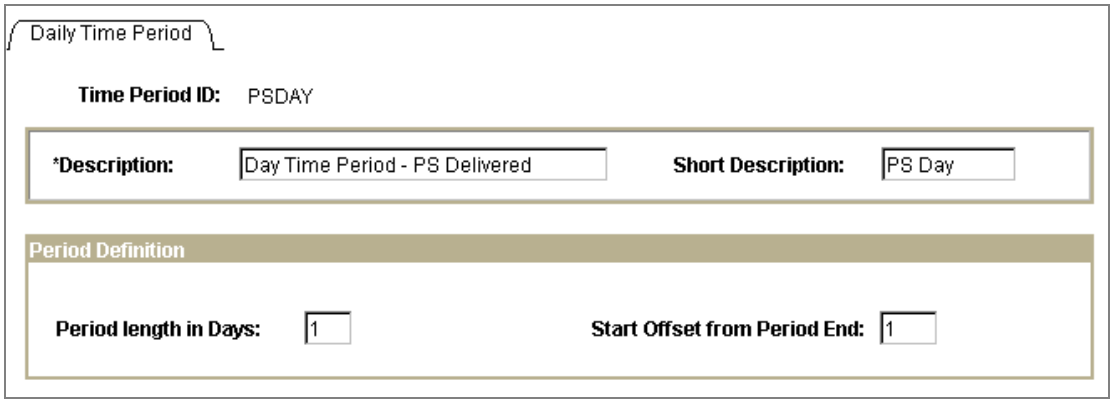
Pages Used to Establish Time Periods

Page Name	*Object Name*	*Navigation*	*Usage*
Daily Time Period	TL_FIXED_DAY_PNL	Define Business Rules, Define Time and Labor, Setup 1, Time Period - Day	To establish a fixed day-type period when building time period calendars.
Weekly Time Period	TL_FIXED_WEEK_PNL	Define Business Rules, Define Time and Labor, Setup 1, Time Period - Week	To establish weekly periods of time when building time period calendars.

Page Name	*Object Name*	*Navigation*	*Usage*
Monthly Time Period	TL_FIXED_MNTH_PNL	Define Business Rules, Time and Labor, Setup 1, Time Period - Month	To establish monthly periods of time when building a time period calendar.
Complex Time Period	TL_COMPLEX_PNL	Define Business Rules, Define Time and Labor, Setup 1, Time Period - Complex	To establish complex periods of time when building a time period calendar. Use this page for periods that cannot be defined by other period definitions.
Repeating Time Period	TL_REPEATING_PNL	Define Business Rules, Define Time and Labor, Setup 1, Time Period - Repeating	To establish repeating periods of time when building a time period calendar.

Establishing a Daily Time Period

Access the Daily Time Period page.



Daily Time Period page

Start Offset from Period End

Enter the number of offset days. 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 Data page are those with offset days = 1.

Example: Positive Offset Days

If the offset is a positive number, the next period instance starts after that number of offset days, as the following table illustrates.

Offset Days Number	Original End Date of the First Period	New Instance Start Date for Next Period
1	24 January 2000	25 January 2000
2	24 January 2000	26 January 2000

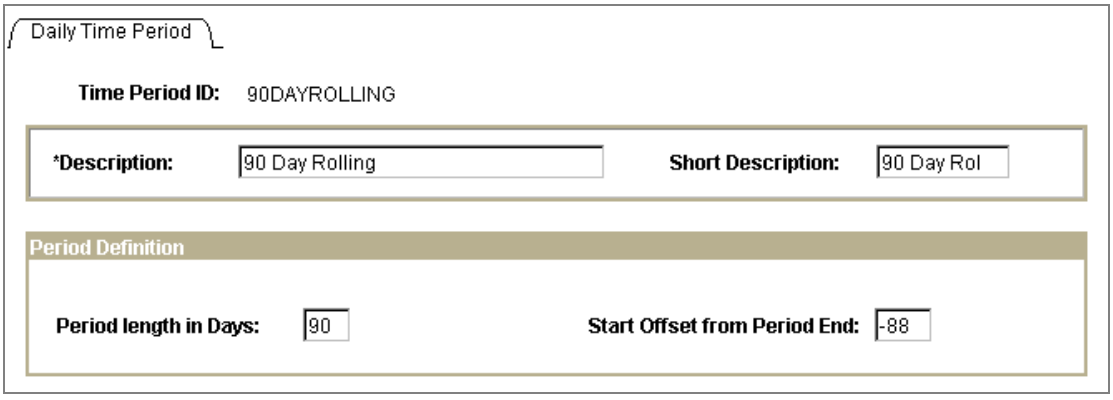
Example: Negative Offset Days

If the offset is a negative number, the system counts backwards from the end of the earlier period instance by the number of offset days to determine the start of the next period instance. Any two consecutive period instances will overlap if the offset is negative. The absolute value of offset days cannot be equal to or greater than the period length. In other words, when the offset days number 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, observe the following rule: *The maximum number of negative offset days cannot exceed the period length minus two.* The following table illustrates the results of using this rule. Note that if the offset is *–6,* it exceeds the maximum number of offset days and the system creates a new period identical to the prior period.

Offset Days Number	Begin and End Dates of the First Period	Begin and End Dates of the Next Period
–6	3 January—9 January 2000	3 January—9 January 2000
–5	3 January—9 January 2000	4 January—10 January 2000
–4	3 January—9 January 2000	5 January—11 January 2000
–3	3 January—9 January 2000	6 January—12 January 2000

Example: Creating a Rolling Period With Negative Offset Days



Daily Time Period page

This page illustrates how to define the offset to create a 90-day rolling period. To create a rolling period, the **Start Offset for Period End** field value should be two less than the length of the rolling period (90 – 2 = 88). If you attempt to use -89, the system will generate the following error message: "Invalid Value for Offset." The system starts the new period by counting backwards from the day before the end date of the first period. If your first period

instance were 1 January 2000 to 30 March 2000, the system would subtract 89 days, beginning from 29 March, which would start the next period on 1 January. To be a rolling period, the next instance of time should begin one day after the first period instance.

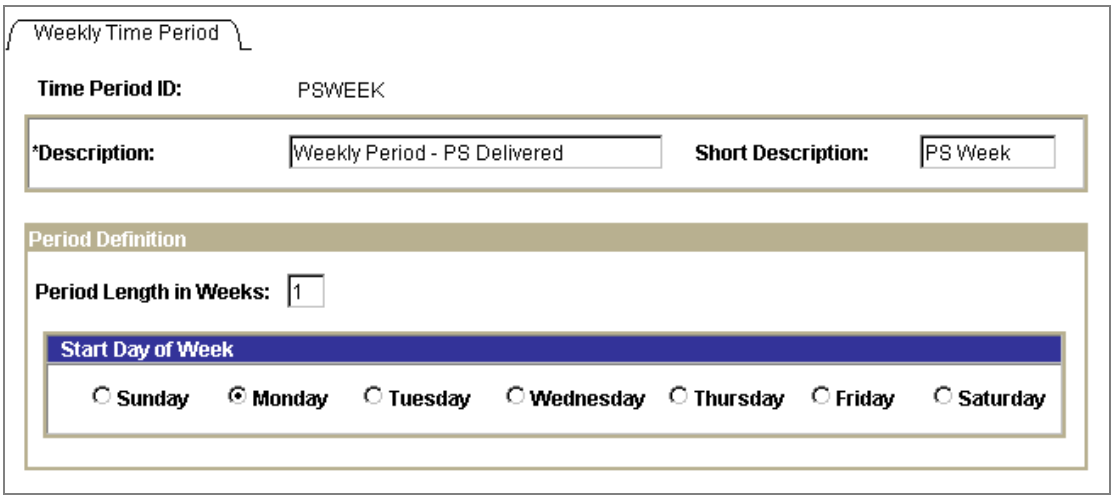
If we build a calendar for the 90-day rolling period from 1 January 2000 to 31 December 2000, the partial results for January 2000 on the View Time Period Calendar page would look like this:

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

90-day rolling periods from 1 January 2000 to 31 December 2000

Establishing a Weekly Time Period

Access the Weekly Time Period page.

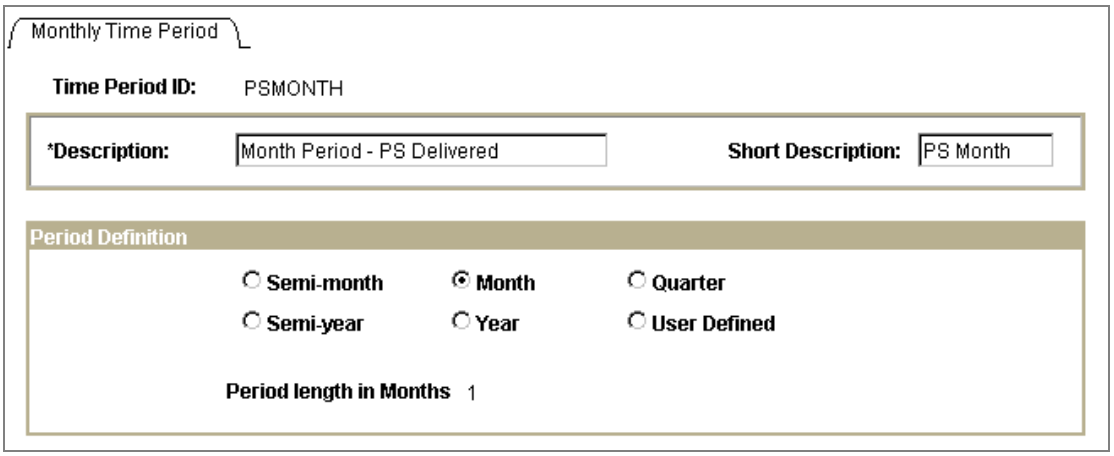


Weekly Time Period page

Enter the period length in weeks and select a start day for the week.

Establishing a Monthly Time Period

Access the Monthly Time Period page.



Monthly Time Period page

Semi-month Select semi-month for the period length to be15 days.

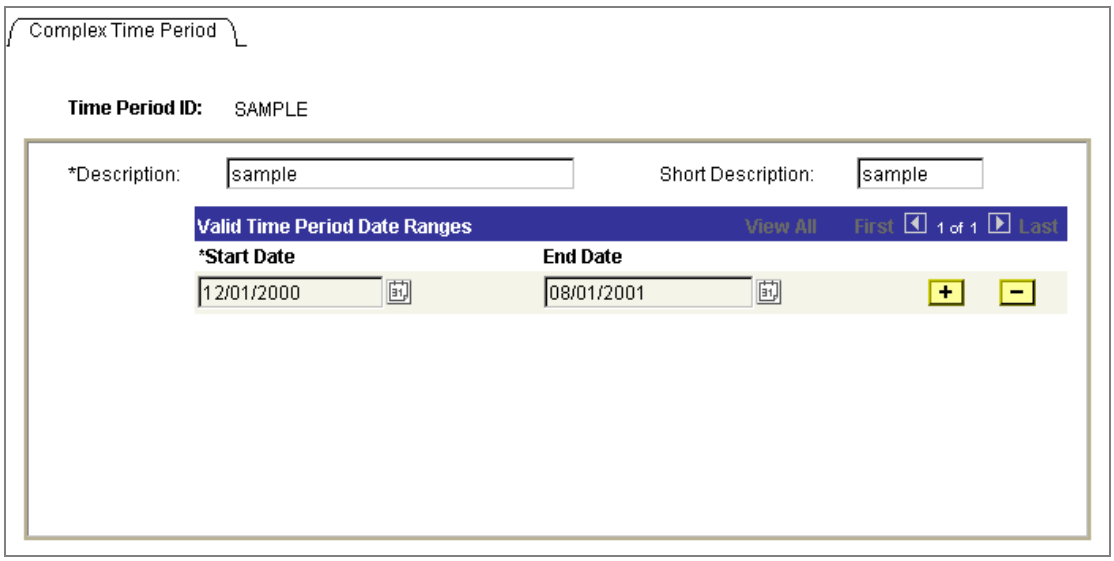
Semi-year Select semi-year for your period length to be 6 months.

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.

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

Establishing a Complex Time Period

Access the Complex Time Period page.



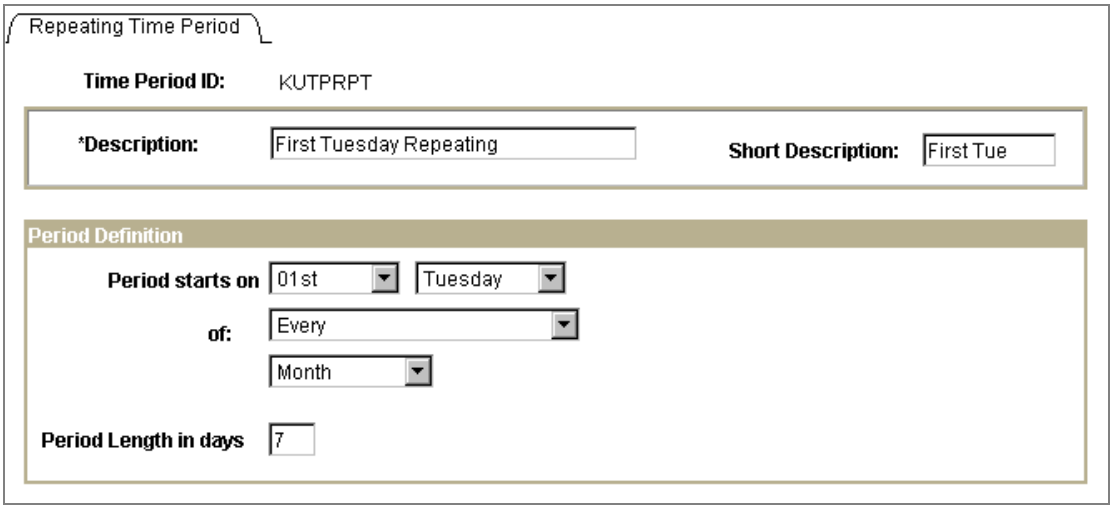
Complex Time Period page

Enter a start and end date for the time period.

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

Establishing a Repeating Time Period

Access the Repeating Time Period page.



Repeating Time Period page

Period starts on

Repeating periods can be defined in any number of ways. To define a repeating period, follow these steps:

1. In the **Period Starts on** fields, 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. Enter the duration of the period in the **Period Length in days** field. If you enter ***2*** in this field, the repeating period in this example would last two days beginning with the last Sunday 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 building the period using 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 and Viewing Calendars

This section covers:

- General rules for building periods and calendars.
- Creating instances of a time and labor calendar.

- Viewing the time period instances for each calendar.

General Rules for Building Periods and Calendars

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

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

Important! To understand the information in this section, you must be familiar with the material in Understanding Batch Processing in Time Administration and Creating Rules in Time Administration.

Building Calendars

Build 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 the Time Administration process, if gaps exist in time reporting periods or the calendar connected with a rule, the system may select a much greater period of interest than necessary, and the schedule resolve process may end up resolving a larger range of dates than necessary. This can significantly reduce performance time.

The Time Administration process determines the period of interest by looking at both the time reporting period—identified by the time period ID for 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) the Time Administration process may need to go to capture the data needed for rules processing.

Example: Building Calendars

Assume that there is a rule program containing a weekly rule and a biweekly rule with the following priority ranking:

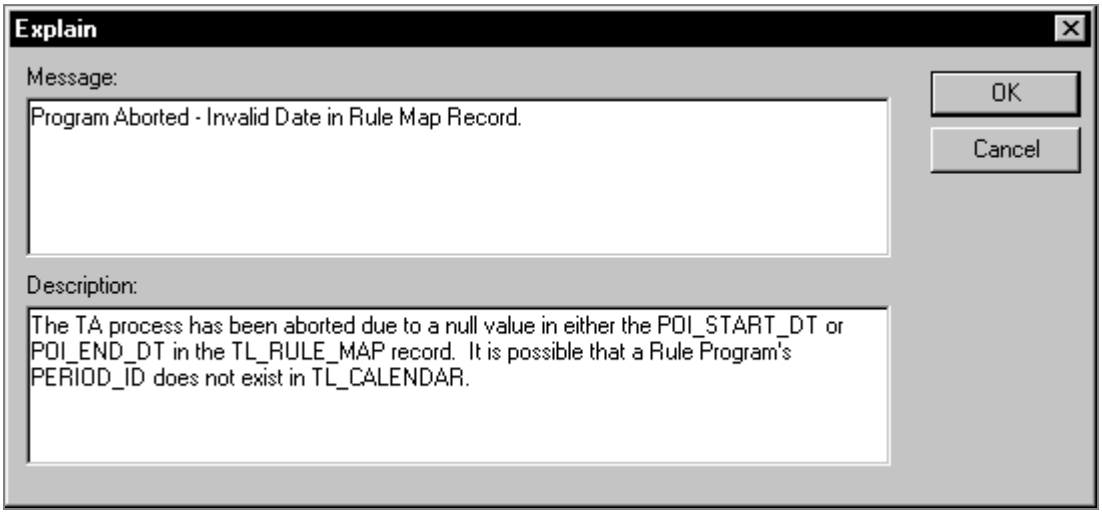
Rules	*Rule Priority*	*Periods*
Rule 1	Priority 1	Weekly
Rule 2	Priority 2	Biweekly

Assume that you have calendars for the following periods:

Calendar Builds for Each Period	
Weekly Period	Biweekly Period
2000	2000
2005	No Calendar Build for 2005
2006	2006

In this example, if you process rules for a period that ends on 7 January 2006 but starts 15 December 2005, you will extend the period of interest back to 2000, since no calendar exists for the biweekly rule in 2005, and both the weekly and biweekly rules must be run. Assuming that you are processing a group of exception reporters, the schedule resolve process would resolve time back to 2005 (time for exception reporters is based on time schedules unless there is an exception to the schedule).

If you have not built 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 the Time Administration process:



Invalid Date in Rule Map Record message

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 or future for all period IDs associated with the time reporters being processed through the Time Administration process.

Building a Complete Calendar

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

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

    - Workgroups

- Rules

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

   - 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 two intersects the time reporting period for the workgroup to process.

   Build the calendar *at least* as far 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, build the calendar as far into the past as the final period of interest start date.

4. Determine where the maximum date found in step two intersects the time reporting period for the workgroup to process.

   Build the 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, build the calendar as far into the future as the end of the rule period.

Override Indicator Set to OFF

If you rebuild your calendar with the override indicator set to OFF, and period instances already exist within the start and end dates of the calendar, the system will not alter the existing period instances within these dates. If you create new time periods, the system adds them to the existing ones.

Note. 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.

To preserve your current period definitions, but change the start and end dates of the calendar, set the override indicator to *OFF,* change the begin and end dates, and rerun the Calendar Build process. The following criteria apply:

- If the new start and end dates fall within or are equal to the old dates, the system builds 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 instances are built backwards in time, beginning with the old start date.

Example 1: Override Indicator Set to *OFF*

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: 15 December 1999 – 31 December 2000

The end dates are identical; however, the start dates are different. The new start date is 15 December 1999; the old start date is 1 January 2000. The system will create new period instances from 31 December 1999 to 15 December 1999. 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 builds new period instances going forward from the last end date.

Example 2: Override Indicator Set to *OFF*

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: 1 January 2000 – 15 February 2001

The start dates are identical; however, the end dates are different. The new end date is 15 February 2001; the old end date is 31 December 2000. The system builds new period instances going 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 builds 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 3: Override Indicator Set to *OFF*

Original Calendar Dates: 1 January 2000 – 31 December 2000

New Calendar Dates: December 15 1999 – 15 February 2001

The new calendar expands the date range of the old calendar in two directions. The system builds new periods backwards from 31 December 1999 to 15 December 1999, and forwards from 1 January 2001 to 15 February 2001.

Note. For daily, weekly and monthly period types, if the override indicator is set to *OFF,* the system does not alter existing records. But for 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 when you define the period on the Complex Time Period page—they must be extended or shortened 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 deletes all records from the new start date onwards and rebuilds the calendar as if no period instances existed for the new calendar period. No period instance for dates prior to the new start date are altered.

Note. For daily, weekly, and monthly period types, if the override indicator is set to *ON,* the system deletes all records from the new start date onwards. But for 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" to change the start and end dates of these periods.

Creating Payable Time

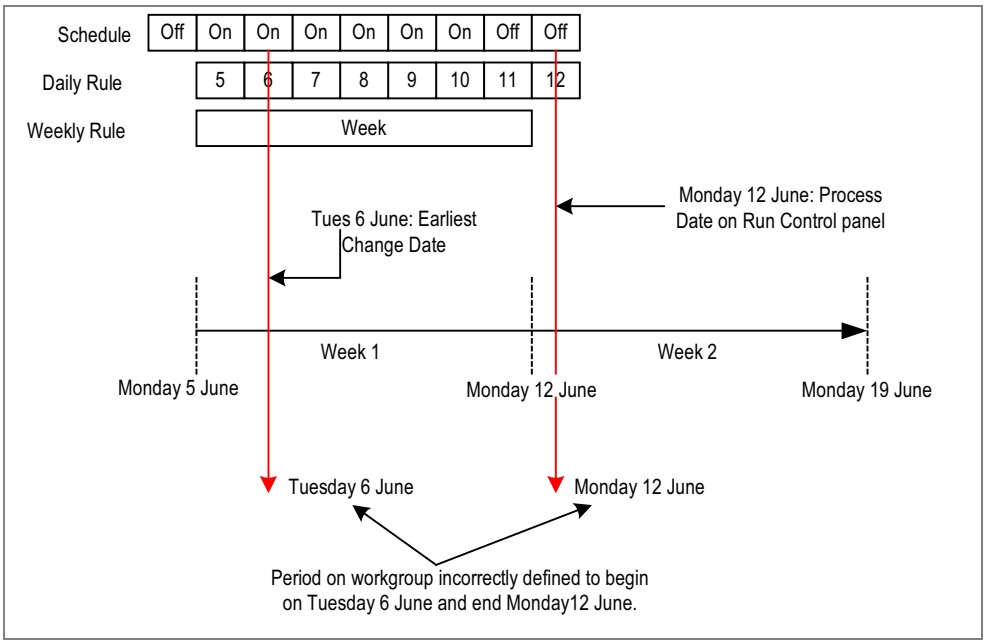
Important! If you are unfamiliar with the concept of payable time, review the chapter on Understanding Batch Processing in Time Administration before reading the following section.

Payable time is created through the interaction between the schedule calendar, time reporting periods, and rule periods. Compare the work schedule calendar to the workgroup and rule periods to ensure that the start and end dates of these periods are correctly aligned. If the periods are incorrect, you could end up creating Payable Time on different days than you expected. This is illustrated in the example below:

Example: Creating Payable Time

Assume the following:

- You are processing a workgroup containing exception reporters.
- The workgroup period should specify a begin date of Monday, 5 June and an end date of Sunday, 11 June. By mistake, you 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 the Time Administration process 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 time reporting periods, rule periods, and the schedule calendar, because they all work together to create Payable Time.

See Also

Understanding Batch Processing in Time Administration

Process Scheduler PeopleBook

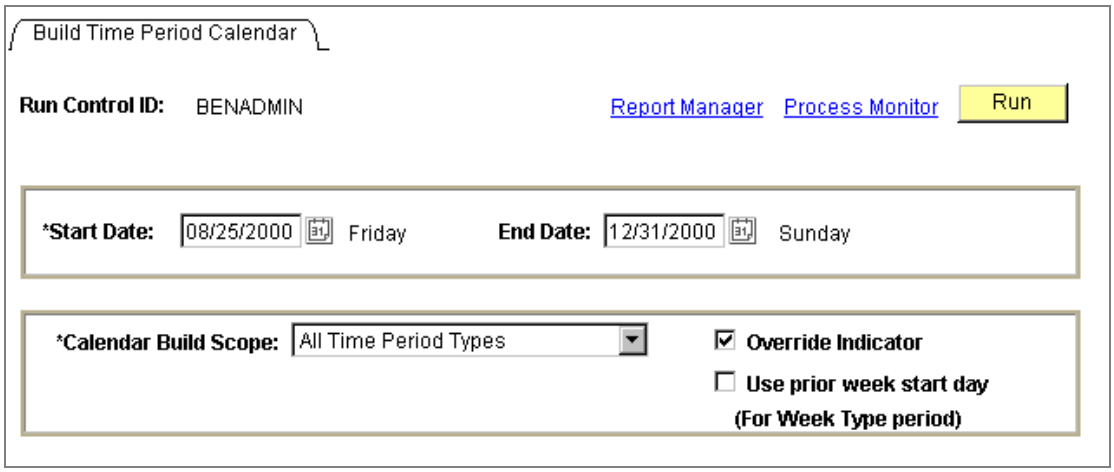
Pages Used to Build and View Calendars

Page Name	*Object Name*	*Navigation*	*Usage*
Build Time Period Calendar	TL_RCTRL_CAL_PNL	Define Business Rules, Define Time and Labor, Process, Build Time Period Calendar	To create instances of a time and labor calendar that will include each of your period start and end dates.

Page Name	Object Name	Navigation	Usage
View Time Period Calendar	TL_CALENDAR_VW_PNL	Define Business Rules, Define Time and Labor, Inquire, View Time Period Calendar	To view the time period instances for each calendar.

Creating Instances of a Time and Labor Calendar

Access the Build Time Period Calendar page.



Build Time Period Calendar page

Calendar Build Scope Select a **Calendar Build Scope**. 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 to indicate which periods to use on an ad hoc basis. When this is selected, the Time Period ID becomes available. Add more periods by inserting additional rows in the Time Period ID section.

All Except One Period Type. Select 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.

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

Single Period Type. Select for the calendar to include only one time period type. When this value is selected, the Period Type becomes available. You can choose from day, week, month, or repeating period types.

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

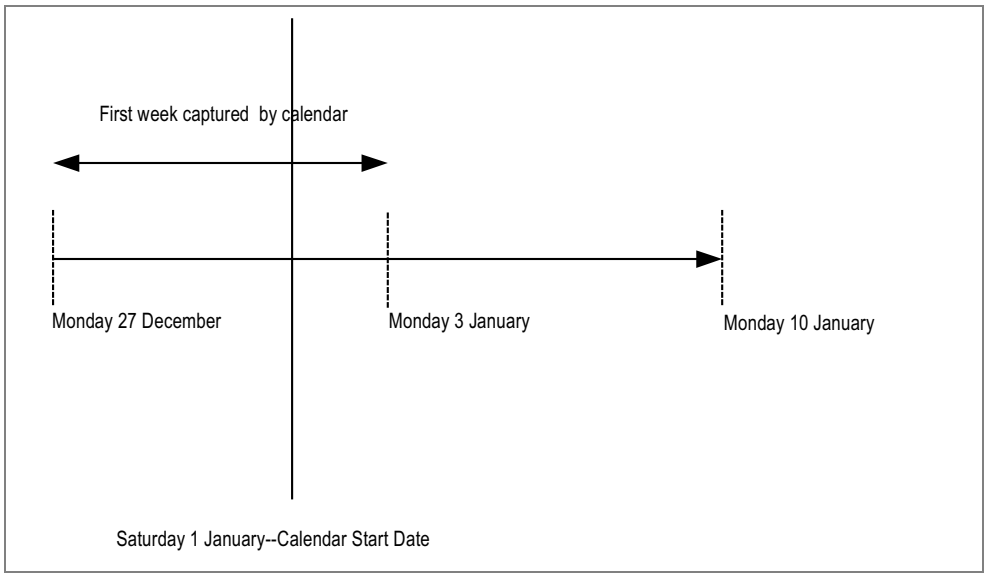
Override Indicator

Select to enable the system to override any existing calendar with a new one containing different or redefined periods. If the override indicator is cleared, the system leaves any existing period instances built in place and allows 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 selected.

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--select the override indicator and build a new calendar. Be aware 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 in a rule, any reported or payable time affected by the change is recalculated in Time Administration. If Payable Time that has been frozen is affected, the Time Administration process will create offsets for the changes.

Use prior week start day

Applies only to weekly time periods and allows resetting the calendar start date when the start date bisects a period instance. For example, assume the 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:



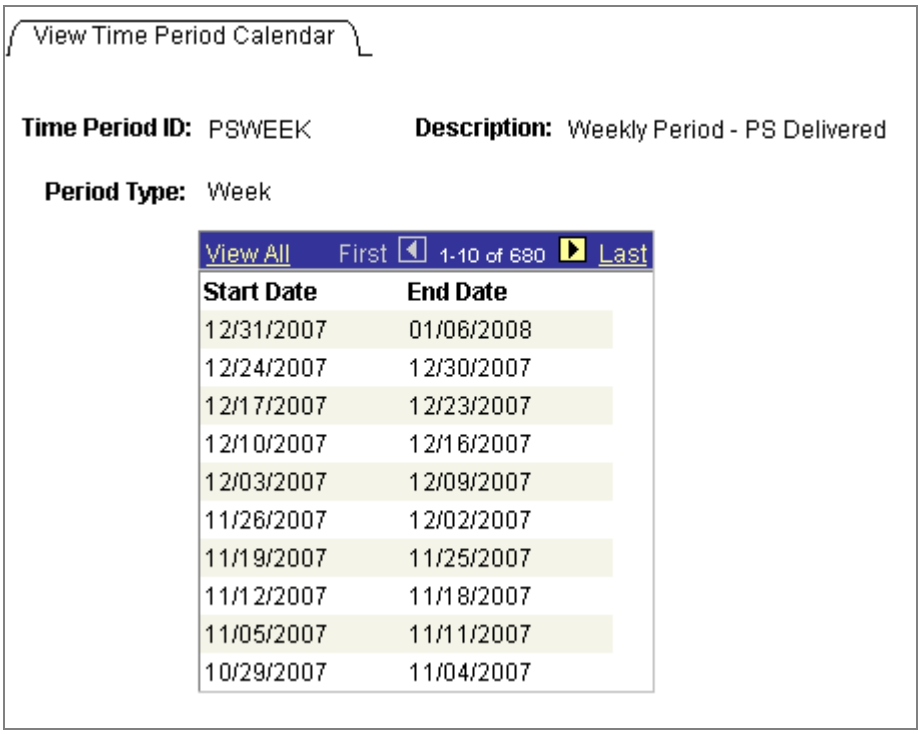
Using the prior week start day

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, 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 begins before the initially specified start date (on 27 December in this example). If the **Use prior week start day** check box is cleared, then the calendar begins on the following Monday (3 January in this example).

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

Viewing Time Period Instances for a Calendar

Access the View Time Period Calendar page.



View Time Period Calendar page

Use the scroll arrows to move up and down the list of the start and end dates on the Time and Labor View Page.

Establishing Compensatory Time Plans

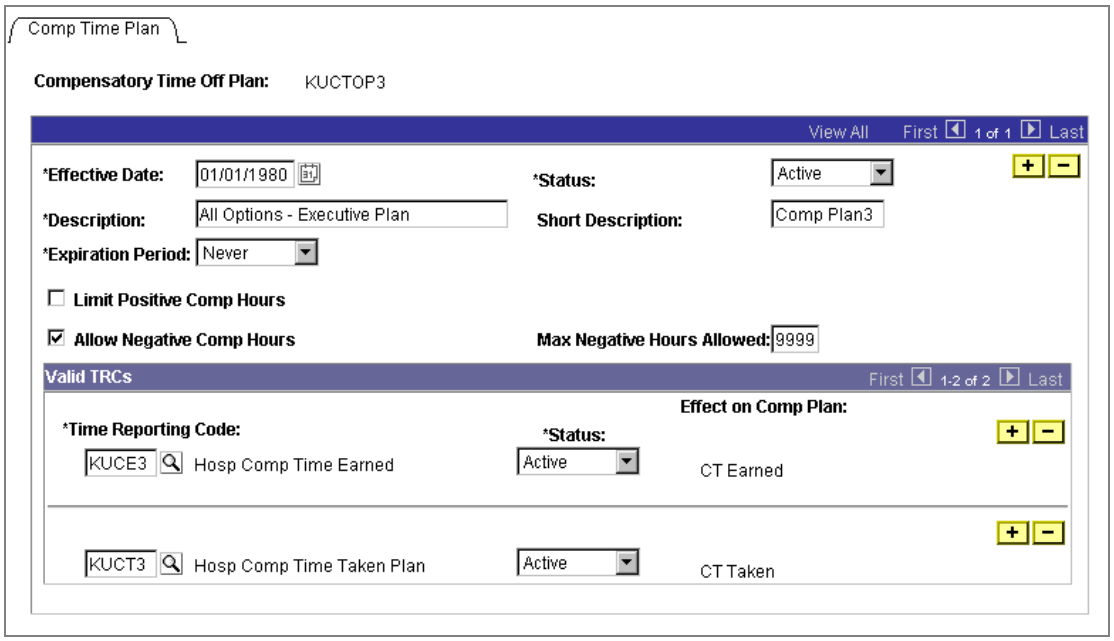
This section covers setting up compensatory time plans.

Page Used to Set Up Compensatory Time Plans

Page Name	*Object Name*	*Navigation*	*Usage*
Comp Time Plan (compensatory time plan)	TL_COMP_TIME_PLAN	Define Business Rules, Define Time and Labor, Setup1, Compensatory Time Off Plan	To set up compensatory time plans for time reporters.

Setting Up Compensatory Time Plans

Access the Comp Time Plan page.



Comp Time Plan page

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 compensatory time, the time will be reevaluated and the balance updated accordingly.

Expiration Period

Enter a unit of measure. Valid options are: ***Days, Months, Years,*** and ***Never.*** If you select ***Never,*** the **Number** field is unavailable. If you select any other value, enter a value in the **Number** field.

Number

Enter a the number of days, months, or years that the compensatory 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 compensatory 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 check box, the **Max Positive Hours Allowed** field is unavailable.

Max Positive Hours Allowed (maximum positive hours allowed)

Enter the maximum number of compensatory time hours that a time reporter can accrue.

Allow Negative Comp Hrs (allow negative compensation hours) — To permit time reporters to have a negative compensatory time hours balance (use more compensatory 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.

Max Negative Hours Allowed (maximum negative hours allowed) — Enter the maximum negative hours of compensatory time that a time reporter can take.

Valid TRCs

Each compensatory time plan is linked to one or more TRCs. Add rows as necessary. If you assign more than one compensatory time plan to a time reporter and the compensatory time plans share one or more TRCs, the system creates 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 creates an error. The uniqueness of the TRCs per compensatory time plan enables the system to recognize which plan's balance is affected when a time reporter has more than one plan.

Time Reporting Code — Enter TRCs that are valid for this compensatory time plan. Some TRCs represent time compensatory time earned, other represent compensatory time taken.

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

"Establishing Time Reporting Codes"

Defining Exceptions

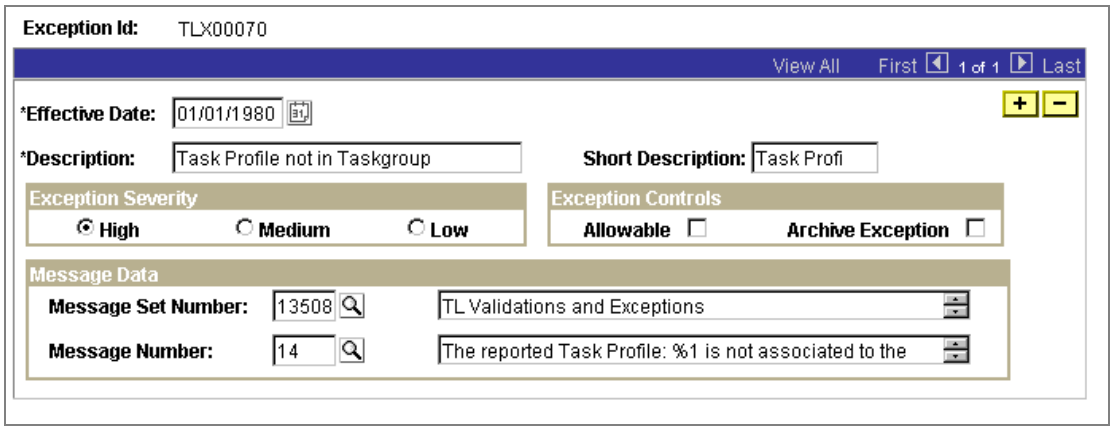
This section covers defining exception criteria and assigning message numbers.

Page Used to Define Exceptions

Page Name	*Object Name*	*Navigation*	*Usage*
Define Exception	TL_DEFINE_EXCEPTION	Define Business Rules, Define Time and Labor Rules, Setup 2, Exception	To establish exception criteria and assign message numbers.

Defining Exceptions and Assigning Message Numbers

Access the Define Exceptions page.



Define Exception Page

Exception Severity

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

High — Select to give the exception a high priority. This is the default for system-defined exceptions. The Time Administration process ignores all unresolved and disallowed high-severity exceptions when calculating payable time. The system will create payable time for these exceptions after they have been resolved or allowed.

Medium — Select to give the exception a medium priority. The Time Administration process ignores all unresolved and disallowed medium-severity exceptions when calculating payable time.

Low — Select to give the exception a low priority. The Time Administration process will create payable time for low-severity exceptions.

Exception Controls

Allowable — Select to allow payable time creation without resolving the exception during the Manage Time processes. If this is a system-defined exception, the check box is cleared by default. An allowable exception doesn't stop the Time Administration process. Leaving this check box cleared to makes the exception disallowable, and requires the time manager to resolve the exception before it can become payable. This check box controls the exception display under Manage Exceptions. The Allow check box appears only if the exception is allowable.

Archive Exception Select to archive exception. For example, you may want the system to store exceptions so that you can track how many times an employee is late. If this is a system-defined exception, the check box is cleared by default. Leave this check box cleared to prevent the exception from appearing on the Exceptions History page after it is resolved using the Manage Exceptions page. If you allow the exception using the Manage Exceptions page, the exception will also appear on the Exceptions History page.

Message Data

Message Set Number Select a number to establish the message set associated with the exception.

Message Number Select the number of the actual message to describe the exception generated by the Time Administration process.

See Also

"Managing Time," Managing Exceptions

Defining PeopleSoft Application Engine Sections

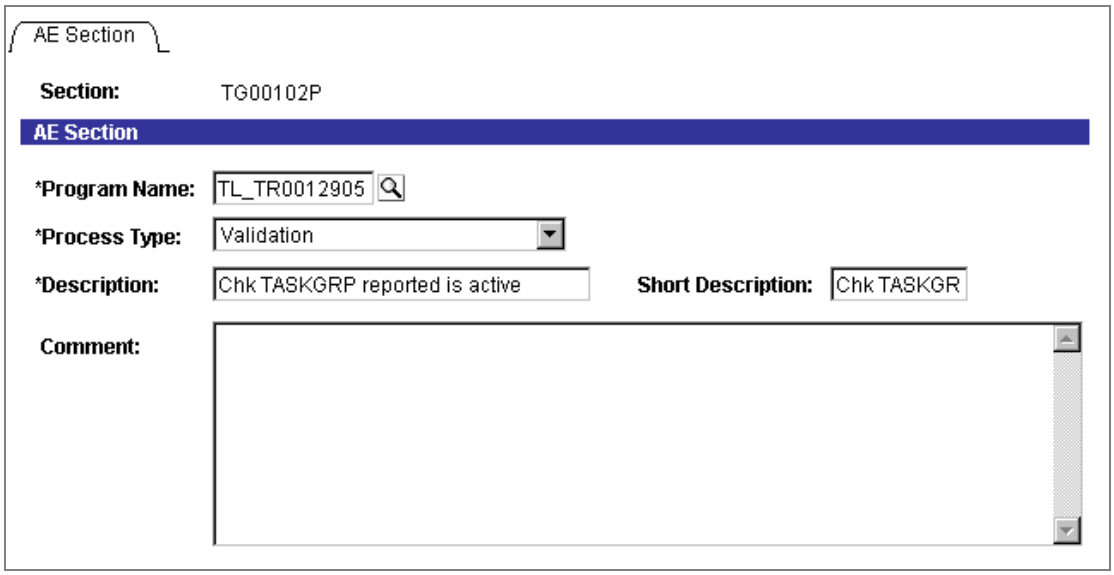
This section covers specifying the purpose of a PeopleSoft Application Engine section.

Page Used to Define PeopleSoft Application Engine Sections

Page Name	*Object Name*	*Navigation*	*Usage*
AE Section (Application Engine section)	TL_AE_SECTION_DEFN	Define Business Rules, Define Time and Labor Rules, Setup 2, AE Section Definition.	To define a PeopleSoft Application Engine section as a referential integrity section or a validation section.

Defining a PeopleSoft Application Engine Section

Access the AE Section page.



AE Section page

Program Name Enter the name of the PeopleSoft Application Engine program in which this application engine section is included.

Process Type Select the operation for the system to perform. Valid values are:

Referential Integrity. Select for this PeopleSoft application engine section to perform referential integrity processing.

Validation. Select for this PeopleSoft Application Engine section to perform validation processing.

Rule (User Exit). Select to use a user exit.

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

"Introduction to PeopleSoft Time and Labor," Background Processing, Understanding Validating Time

"Creating Rules in Time Administration," User Exits

Using Validation Criteria

This section covers:

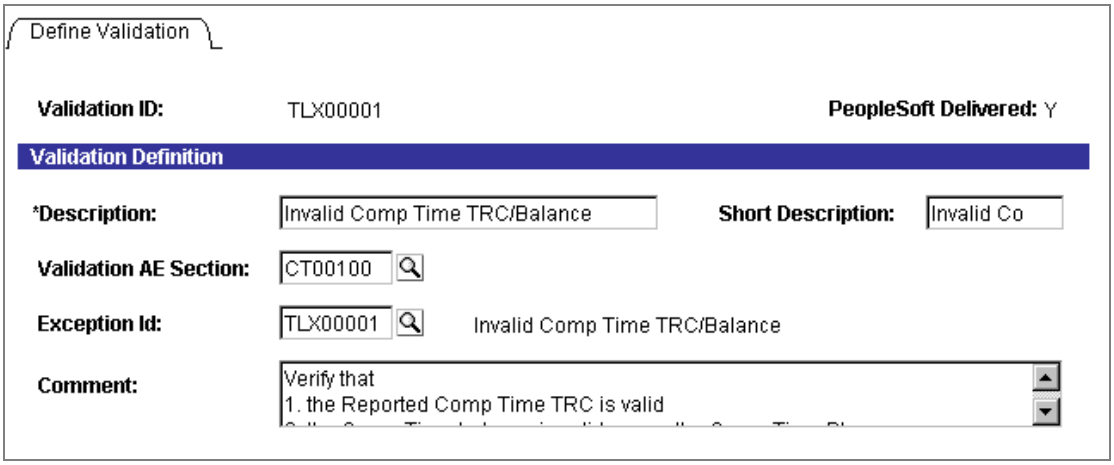
- Defining validation IDs.
- Grouping validation IDs.

Pages Used to Define and Group Validation IDs

Page Name	*Object Name*	*Navigation*	*Usage*
Define Validation	TL_VALID_DEFN_PNL	Define Business Rules, Define Time and Labor Rules, Setup 2, Validation Definition.	To define your validation IDs.
Validation Set	TL_VALID_SET_PNL	Define Business Rules, Define Time and Labor Rules, Setup 2, Validation Set Definition.	To group validation IDs.

Defining Validation IDs

Access the Define Validation page.



Define Validation page

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 several validations could trigger the same exception. There will never be more than one exception per validation.

See Also

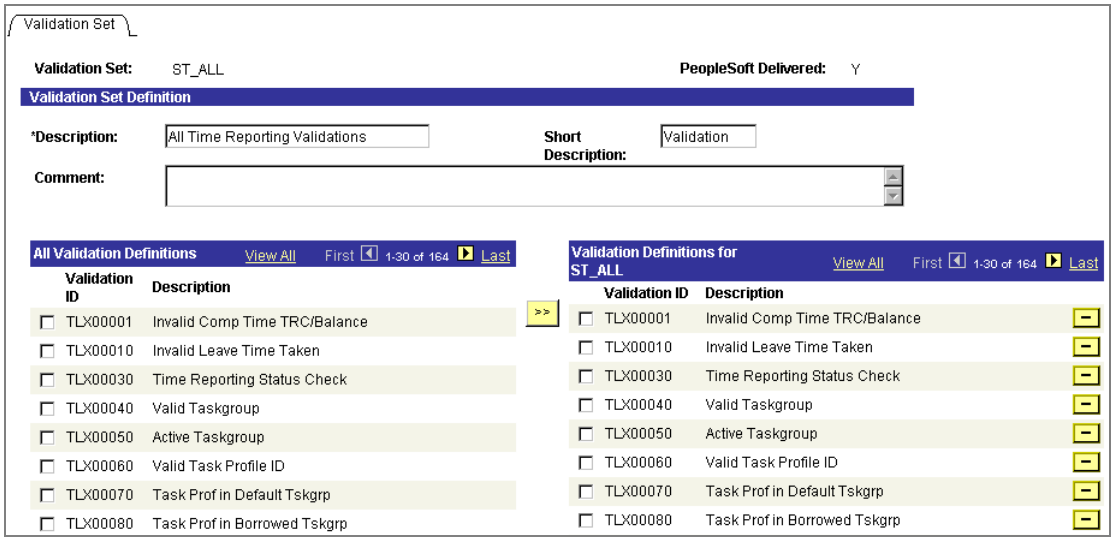
Defining PeopleSoft Application Engine Sections

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Defining Exceptions

Grouping Validation IDs

Access the Validation Set page.



Validation Set page

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. Click **Select All** and the system will select the entire column of check boxes. Or, to select particular validations that should appear in the list, select check boxes next to those validations. Use the **Clear** button to clear the entire column of check boxes. Click the >> button to transfer the selected validations to the new validation set.

Validation Definitions for <validation set name>

This grid represents the validations included in the validation set. Use the check boxes to remove validations from the validation set. After selecting the check boxes for the validations to remove from the validation set, click the **Delete** button to remove selected items.

Defining Override Reason Codes

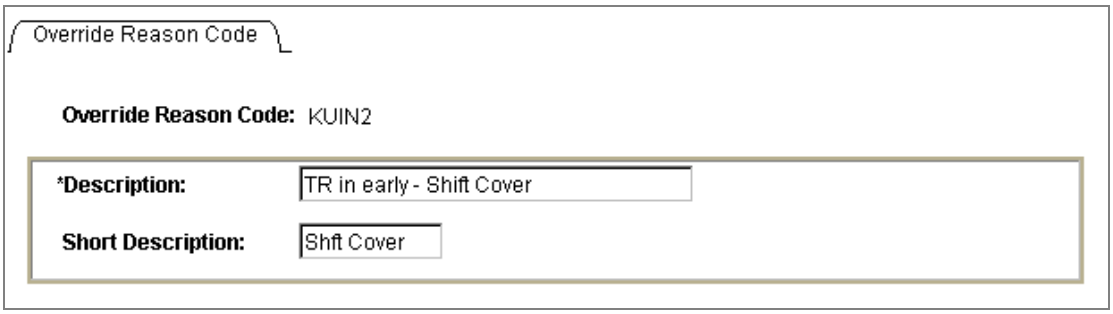
This section covers establishing codes for the reasons for reporting time or for changing reported time.

Page Used to Define Override Reason Codes

Page Name	*Object Name*	*Navigation*	*Usage*
Override Reason Code	TL_OVRD_RSN_PNL	Define Business Rules, Define Time and Labor, Setup 1, Override Reason Code	To define codes for the reasons for reporting or for changing reported time.

Defining Override Reason Codes

Access the Override Reason Code page.



Override Reason Code page

Enter comments and instances of reported time. When you enter comments, enter a reason code so that it will be easy to categorize the comments for reporting purposes. Use override reason codes for the Rapid Time and Time Reporting templates, and with weekly elapsed and weekly punch time.

CHAPTER 4

Establishing Workgroups

This chapter provides an overview of using workgroups and discusses how to:

- Define workgroup defaults and options.
- Make workgroup transfers.
- Make changes to time reporting rule programs.

Understanding 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.

Each time reporter who reports time through PeopleSoft Time and Labor must belong to a workgroup. In addition, the Time Administration process applies rules by workgroup. A workgroup must be created before any process that uses it.

Workgroup Requirements

To meet the requirements for belonging to the same workgroup, a group of time reporters must:

- Be associated with the same time reporting type: Exception Time Reporting or Positive Time Reporting.
- Use the same holiday schedule if you're going to control the holiday schedule at the workgroup level.

Note. 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.

- Use 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.
- Use the same compensation rules and the same time period to assist in determining the period of interest for Time Administration.
- Use the same approval requirement.
- Use the same day breaker—the time used to determine when one day becomes the next.
- Use similar rounding rules for rounding punch and elapsed time.
- They can share the same association to a Compensatory Time Off Plan.

Understanding 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.

Prevent 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

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Common Elements Used in This Chapter

Reporting 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

The Compensation Controls allow the system to validate the compensation criteria that is specific to your Rule Program, TRC Program, or Holiday Schedule setup.

Workgroup

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.

Rounding

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.

Day Breaker

Enables you to define 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. The system uses the day breaker to determine the exact "date under report" (DUR) of each punch or collection of punches that comprise the shift.

Time Reporting Codes (TRCs)	Enables you to define the level at which an organization actually needs to track employee time to support 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.
Date under report (DUR)	The actual date of the time being reported for a shift as defined by the Day Breaker Options and Day Breaker Range.

See Also

"Understanding Batch Processing in Time Administration"

Defining Workgroups

Here's how to define workgroups:

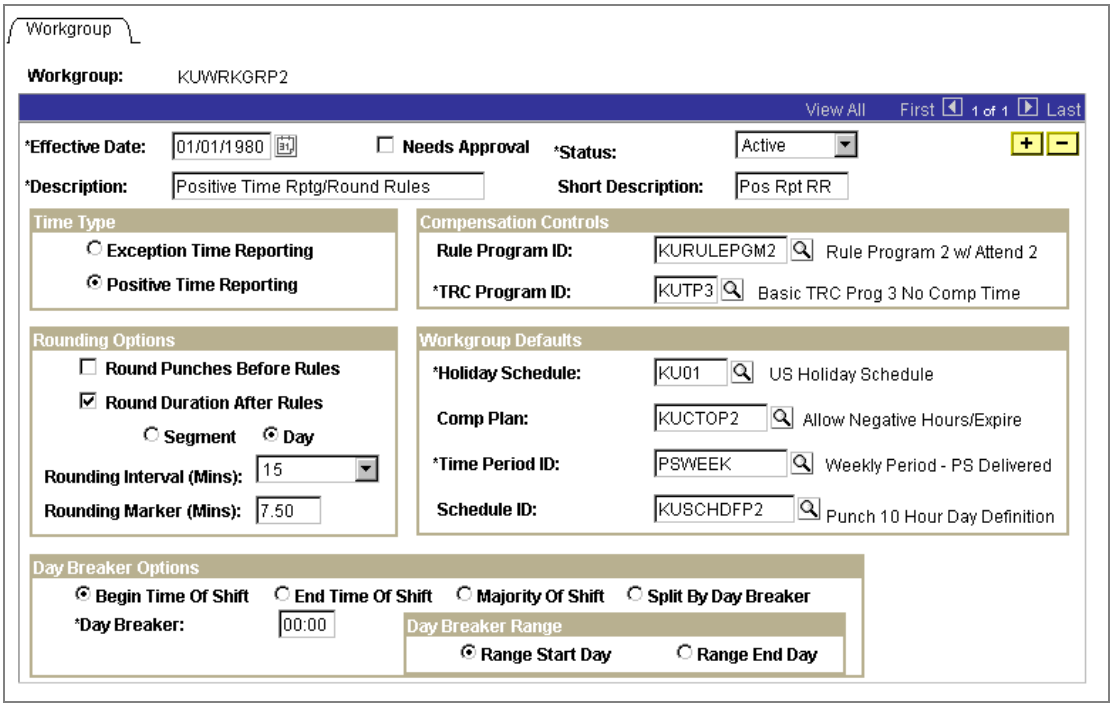
1. Enter basic parameters and approval requirements (if necessary).
2. Define the reporting time type.
3. Define the compensation controls.
4. Specify the workgroup defaults such as Schedule ID, Time Period ID, and Comp Plan.
5. Set up rounding options.
6. Set up day breaker options.

Pages Used to Define Workgroups

Page Name	*Object Name*	*Navigation*	*Usage*
Workgroup	TL_WRKGRP_PNL	Define Business Rules, Define Time and Labor, Setup 1, Workgroup	Define defaults, approval options, rounding options, and day breaker options for a workgroup.

Entering Basic Parameters, Approvals and Status

Access the Workgroup page; name every workgroup and define its basic parameters, approvals and status.



Workgroup page

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 page, the Needs Approval status needs to remain as the only method of closing the time.

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.

Note. 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.

See Also

"Understanding Payable Time"

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

"Understanding Batch Processing in Time Administration"

Defining the Reporting Time Type

Access the Workgroup page. Access the Time Type group box.

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 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.

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.

Defining Compensation Controls

Access the Workgroup page. Access the Compensation Controls group box.

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.

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.

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 pageWeeklyElapsedTimePageBX010079, 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.

See Also

"Establishing Time Reporting Codes"

"Creating Rules in Time Administration," Adding Rules to a Rule Program

Specifying Workgroup Defaults

Access the Workgroup page. Access the Workgroup Defaults group box.

Time Period

Select 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.

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

Schedule ID

Select 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.

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.

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.

See Also

"Defining Work Schedules"

"Setting Up Time Reporters," Assigning Schedules and Assigning and Viewing Compensatory Time Plans

"Using Self Service Components," Managing Employees' Schedules, Overriding an Employee's Schedule

"Setting Up Basic Tables," Time Periods and Compensatory Time Plans

Setting Up Rounding Options

Access the Workgroup page. Access the Rounding Options group box.

There are two types of rounding in PeopleSoft Time and Labor:

Round Punches Before Rules (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.

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.

Round Duration After Rules (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: 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.

Day: 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.

Intervals and Markers

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

Rounding Interval (Mins) 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:

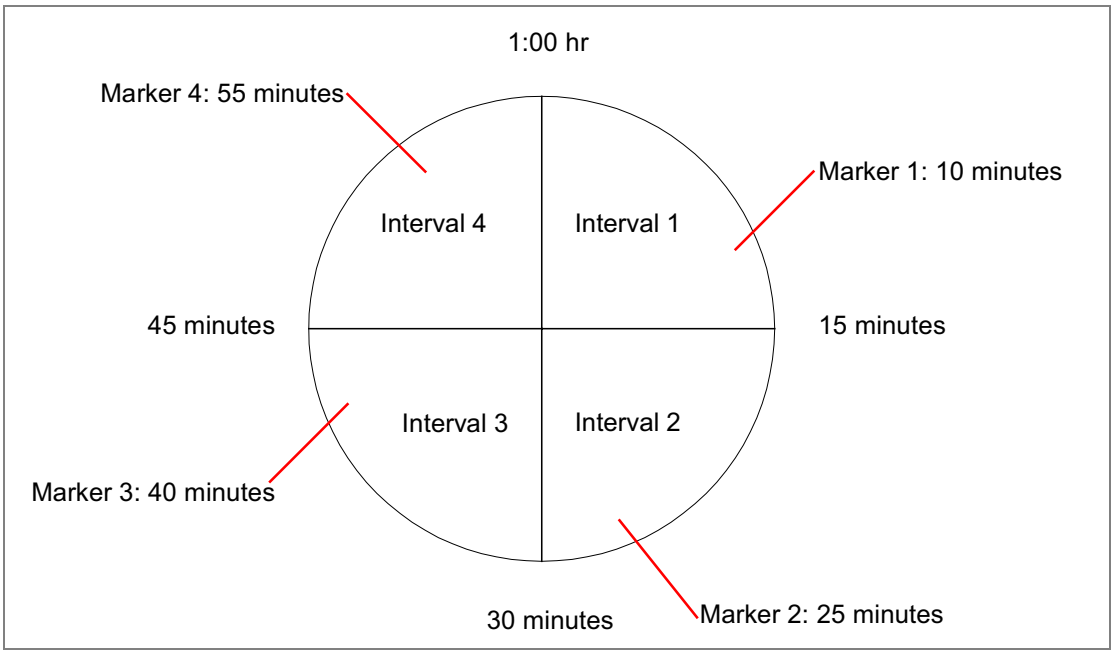
Interval 1: x:00 to x:15

Interval 2: x:15 to x:30

Interval 3: x:30 to x:45

Interval 4: x:45 to x:00

Rounding Marker (Mins) 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

As illustrated in this example, 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.

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.

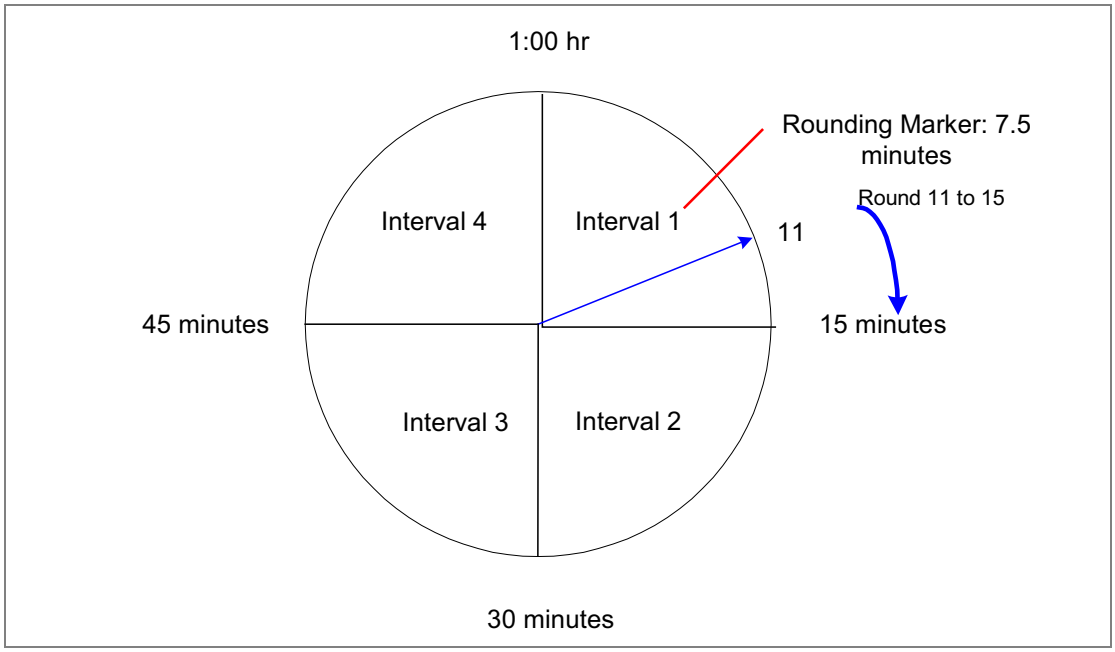
The following example of pre-rules rounding illustrates how the system applies a rounding rule. Let's assume that you have selected the following rounding options, and that the punch to be rounded occurs 11 minutes into the first rounding interval:

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.



Rounding a Punch

Post-rules Rounding

Post-rules rounding affects both punch and elapsed time. In the case of punch time, 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. In the case of elapsed time, time is reported as a duration, so the system simply rounds the reported duration up or down within its corresponding interval.

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.

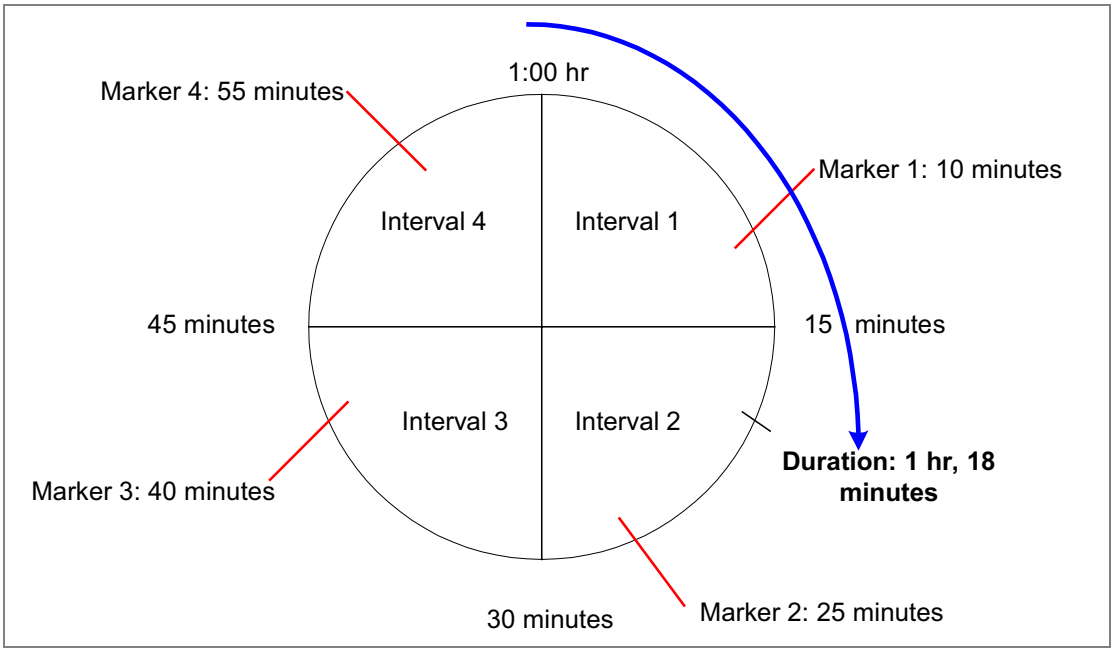
The following examples illustrate how the system applies rounding rules to both punch and elapsed time:

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 that 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.

Note. 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.

See Also

"Understanding Batch Processing in Time Administration," Step 5 – Matching Punches and Step 9 - Performing Post Rules Processing

Setting Up Day Breaker Options

Access the Workgroup page. Access the Day Breaker Options group box.

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. Based on the **Day Breaker** and what we refer to as the **Day Breaker Options,** 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.

Note. Although the normal day breaker is midnight, the optimum day breaker 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.

Controlling the Date Under Report (DUR) of Reported Time

In PeopleSoft Time and Labor, you'll use the **Day Breaker** to define what we call a "Day Breaker Range" (a virtual 24-hour day), and then choose a **Day Breaker Option** to control the DUR (date under report) assigned to reported time.

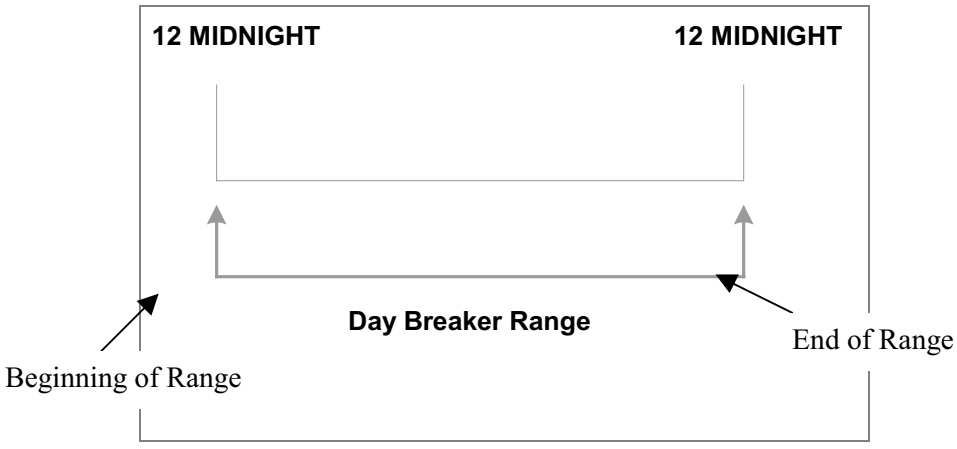
To Define the DUR Assigned to Reported Time:

1. Select a Day Breaker to Define a Day Breaker Range

   In Time and Labor, 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). Although you can create Day Breaker Ranges that coincide with actual calendar days (days that begin at 12:00 midnight and continue for 24 hours), the Day Breaker Range can begin whenever you want it to (since it represents a "virtual" 24 hour day rather than an actual calendar day).

   Consider the following 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.



   Day breaker range

   Once you have defined your Day Breaker Range, you will assign punches to this range in Step 2 (below).

2. Select a Day Breaker Option to Assign Punches to a Day Breaker Range

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.
- The last punch was logged.
- The majority of the time in a shift was worked.
- Or split the time between ranges on either side of the day breaker.

Your options are as follows:

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.
Majority 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 majority of the shift was worked.
Split by Day Breaker	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.

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

For any punch (or collection of punches) assigned to a Day Breaker Range in Step 2, you can move the date under report (DUR) in two directions: towards the **Range Start Day** or towards the **Range End Day**.

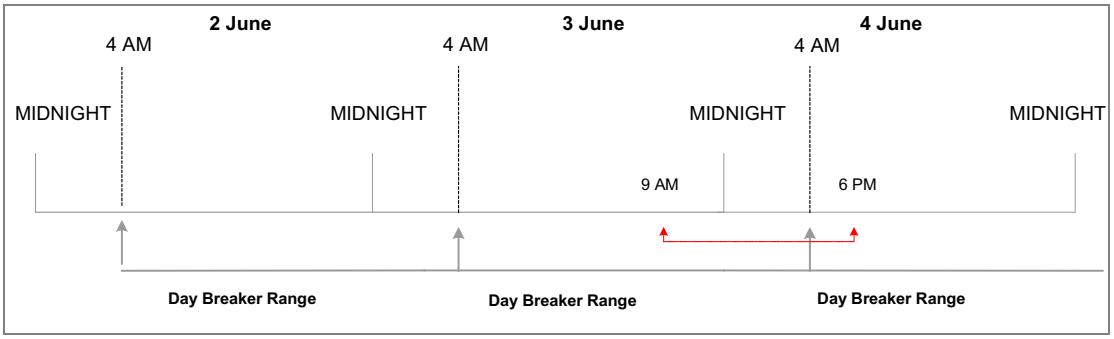
Range Start Day	Select this option if you want to assign punches within a Day Breaker Range to the calendar (or "actual") day intersected by the start of the range.
Range End Day	Select this option if you want to assign punches within a Day Breaker Range to the calendar (or "actual") day intersected by the end of the range.

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

The following example illustrates how to use the Day Breaker and Day Breaker Options to define the date under report (DUR) of your employee's punch time. 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 and 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

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.

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

Note. 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.

See Also

"Understanding Batch Processing in Time Administration," Step 5 – Matching Punches

Additional Daybreaker Option Examples

This section contains additional examples illustrating the effect on the DUR (date under report) of applying different **Day Breaker** and **Day Breaker Range** options to a time reporter's punch time.

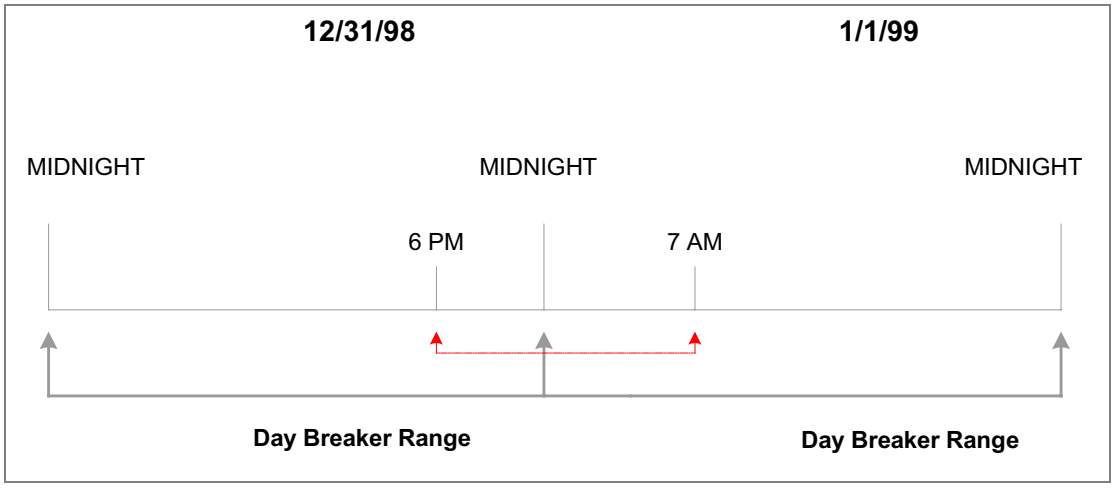
Example 1

In this example, assume that a time reporter reports time that crosses the day breaker, which 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 this data, the following diagram shows the dates and day breaker ranges:



Dates and day breaker ranges

The results of applying different daybreaker options to the reported time are illustrated below:

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

Day Breaker Option	Day Breaker Range	Resulting DUR
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

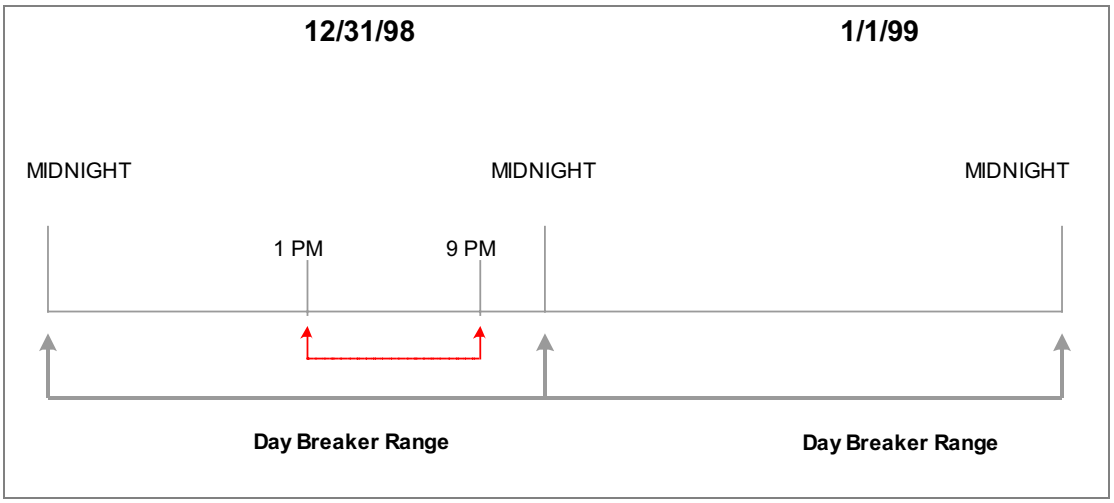
In this example, assume that the time reporter's time does not cross the day breaker. The day breaker is set to midnight.

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 results of applying different daybreaker options to the reported time are illustrated below:

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	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

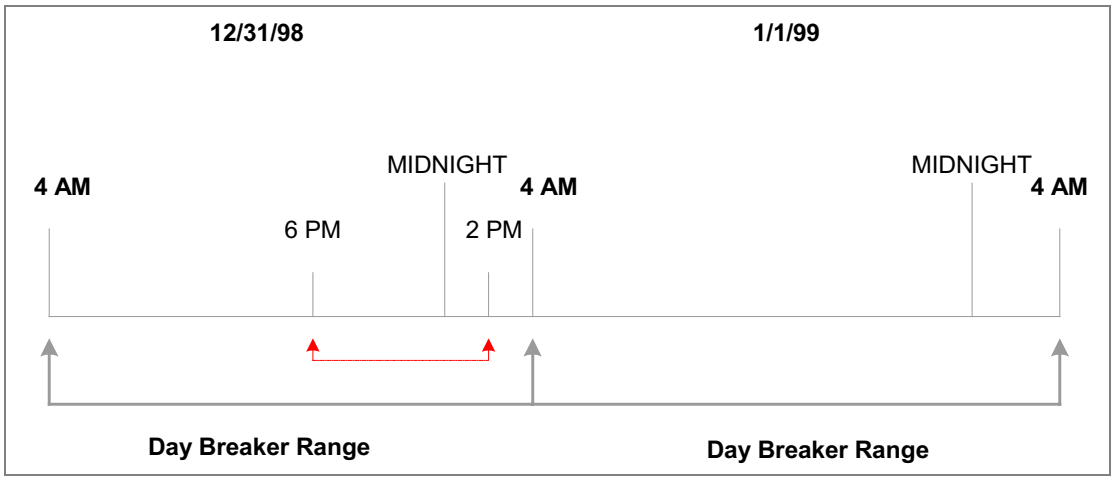
Example 3

In this example, assume that the time reporter's time 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 results of applying different daybreaker options to the reported time are illustrated below:

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	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

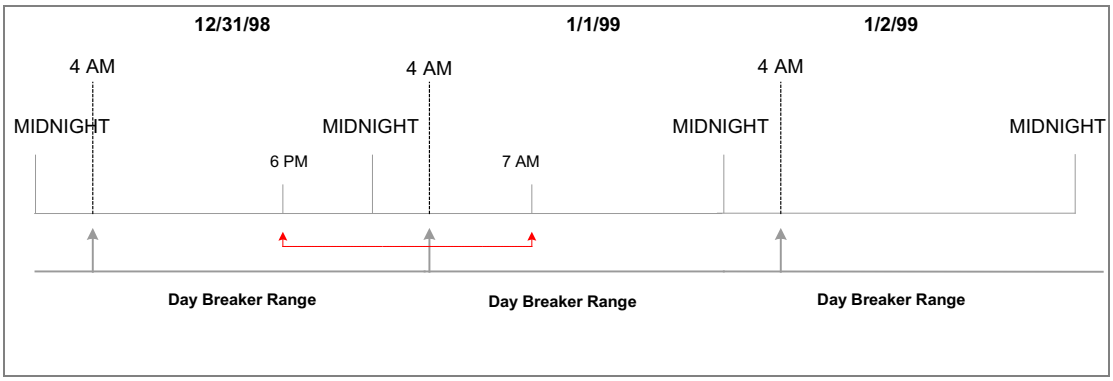
Example 4

In this example, assume that the time reporter reports time that crosses the day breaker, which 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 results of applying different daybreaker options to the reported time are illustrated below:

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	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

Making 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.

This section describes the effect of workgroup transfers on the period of interest calculation in Time Administration as well as on rules processing. Because mid-period workgroup transfers can cause rules to be applied incorrectly, we strongly recommend that you schedule workgroup transfers to take place only at the beginning of a period.

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.*

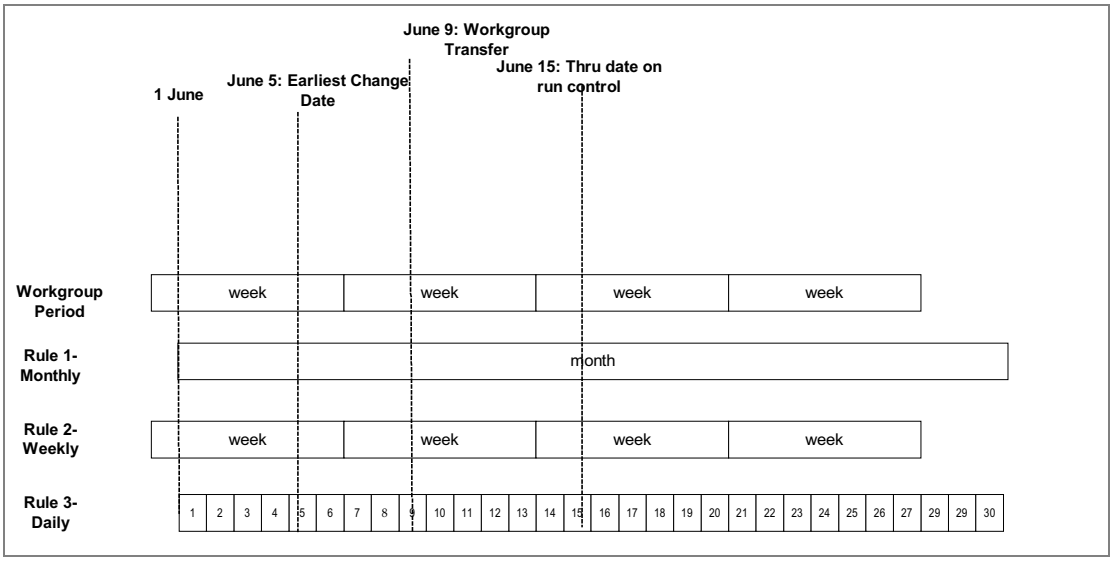
This is illustrated in the following example:

Example

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 in 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.

Note. 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.

A Note on 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.

Note. 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.

See Also

"Managing Time"

"Reporting Time"

Making Changes to a Workgroup's 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 strongly recommend that you schedule 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 Making 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.

Note. 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.

See Also

"Creating Rules in Time Administration," Adding Rules to a Rule Program

CHAPTER 5

Establishing Time Reporting Codes

This chapter provides an overview of time reporting codes and tells you how to:

- Define and map time reporting codes (TRCs).
- Define TRC programs.
- Establish units of measure values.

Understanding 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.

Common Elements Used in This Chapter

The following elements are common to multiple pages discussed in this chapter.

Time Reporting Code (TRC)	TRC is an element of compensation or a bucket of several elements in which the system collects labor data, hours, amounts, or units worked.
Units of Measure (UOM)	The increments by which you measure time worked, pay periods, or other elements to be reported.

TRC Program	The time reporting code program of rules usually assigned by workgroup.

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.

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. • Delete an effective-dated row if it invalidates the association with a TRC program. • Inactivate a TRC if it is associated to a Compensatory Time Off Plan. • 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. • Delete an effective-dated row if it invalidates the association to a Workgroup. • Inactivate a TRC program if it is associated to a Time Collection Device. • 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, Compensatory Time Off Plan
TRC Program	Workgroup, TCD Setup

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Defining and Mapping Time Reporting Codes (TRCs)

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.

In PeopleSoft Time and Labor, you must explicitly map TRCs to payroll Earnings Codes. 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.

To define and map Time Reporting Codes:

1. Define Time Reporting Code attributes.
2. Map TRC's to earnings codes.
3. Setup compensation and interface options.

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 Earnings Codes 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 the TRC and the NA Earnings Code. This enables PeopleSoft Time and Labor to choose the right row when calculating estimated gross and keeps the system in synch with the NA Earnings codes. The field values carried over from the NA Earnings Code to the TRC are as follows:

- Effective Date
- Multiplication Factor
- Rate Adjustment Factor
- **Flat Amount** (the Flat Amount on the Earnings Code populates the Flat Amount element on the TRC)
- **Unit/Override Rate** (the Unit/Override Rate on the Earnings Code populates the Rate element on the TRC)
- Description
- Short Description
- **Add to Gross Flag** (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)

Note. When creating a new TRC, the current system date becomes 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 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 *not* 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.
	The Rate field is displayed with the value from the NA Earnings Code
	The Rate Overridable field is hidden and defaults to *Not Selected.*
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 *Not Selected.*
	The Rate and Overridable fields are hidden and default to *Selected.*
When you unsynchronize a TRC from a Flat Amount or Unit Override/Rate NA Earnings Code	The Rate Overridable and Per InstanceOverridable fields are hidden and default to *Selected.*

Action	*What the System Does*
If a reported rate is different from the Rate on the TRC, and the TRC is synchronized to a NA Earnings Code	We provide 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 provide 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.

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

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.

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 were 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.

See Also

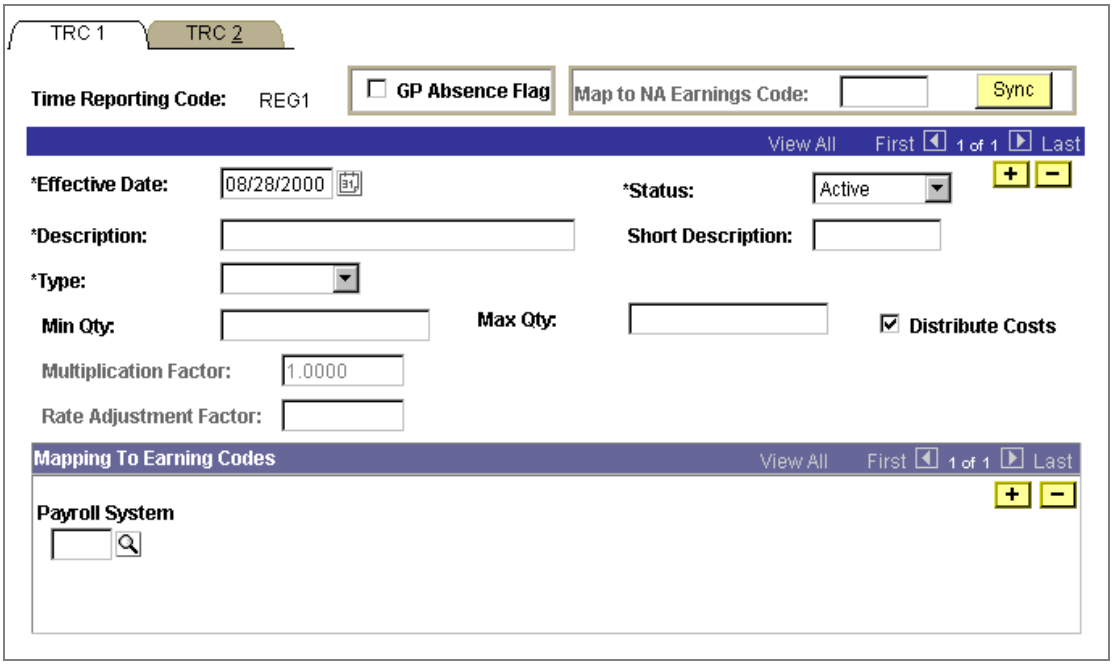
PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes"

Pages Used to Define and Map Time Reporting Codes

Page Name	*Object Name*	*Navigation*	*Usage*
TRC 1	TL_TRC_PNL1	Define Business Rules, Define Time and Labor, Setup 1, TRC, TRC 1	Define Time Reporting Code attributes and map TRCs to Earnings Codes.
TRC 2	TL_TRC_PNL2	Define Business Rules, Define Time and Labor, Setup 1, TRC, TRC 2	Setup compensation and interface options and enter optional comments.

Defining Time Reporting Code Attributes

Access the TRC 1 page.



TRC 1 page

Note. 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)

Select 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.

Before clicking the Sync button, you must select a NA Earnings Code. Effective-dated rows on TRC and the NA Earnings Code will be the same after the synchronize process is completed. In this way, Time and Labor selects the right row when calculating estimated gross, and won't be out of synchronize with the NA Earnings code. However, if you create the TRC after the current effective dated row of the NA Earnings Code, you will have an extra row on the TRC. You can also insert an effective-dated row on the TRC between the synchronized rows from the NA Earnings Code. If you do, the elements in

common from the NA Earnings Code are copied down to the new row on the TRC.

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 (1%). If you hit OK the TRCs shown will get Unsynced and you have to map those TRCs to another Earnings Code. Do you with to Unsync these TRCs mapped to this NA Earnings Code now? (13500,169).

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 Sync with the following TRCs (%1). If you hit OK the TRCs shown will get Unsynced and you have to map those TRCs to another Earnings Code. Do you wish to Unsync these TRCs mapped to this NA 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 warning message: Selected Earnings Code is Active with the following TRCs (%1). Make sure that you re-sync the TRC to the NA 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	

TRC Type	*Earnings Payment Type*	*Comp Rate Code Type*	*TL Quantity*
		PC – Percent	
	H – Hours Only	HR – Hourly Rate	
		HF – Hourly + Flat Amount	
		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 TRCs to Earning Codes

Access the Mapping to Earnings Codes group box.

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. 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)

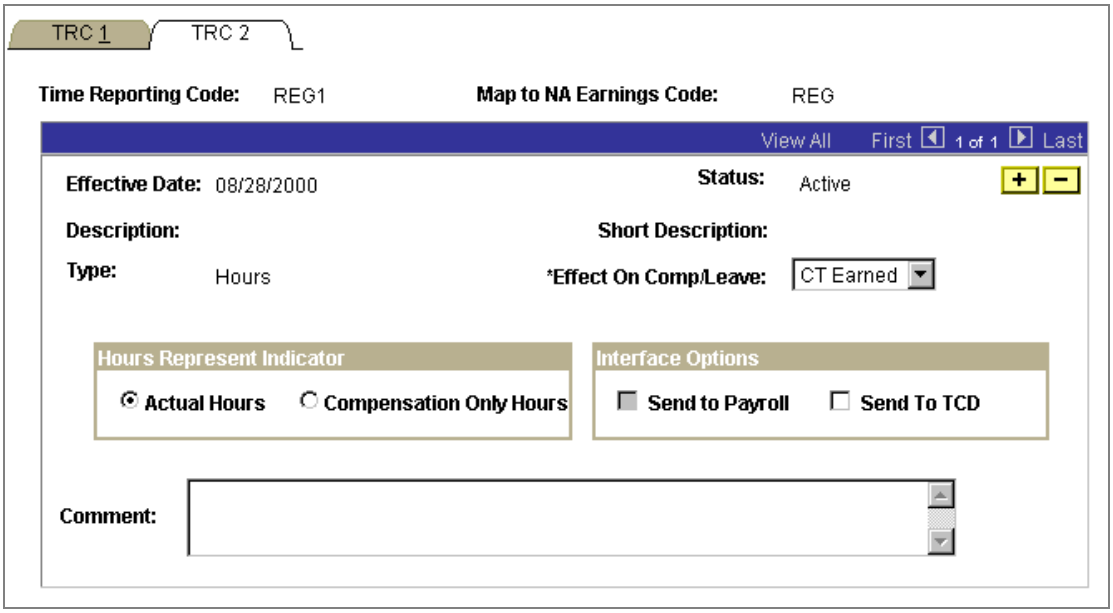
Select the GP Earnings Code for mapping costs back to Time and Labor from GP.

See Also

"Integrating With Payroll Applications," Integrating With PeopleSoft Global Payroll

Setting Up Compensation and Interface Options

Access the TRC 2 page.



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.

Effect on Comp/Leave

Select ***No Effect, CT Earned, CT Taken*** or ***Leave Takn*** 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 Takn*** (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 Takn 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 Takn*** 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.

See Also

"Using Time Collection Devices (TCDs)"

Defining a TRC Program

Here's how to define a TRC Program:

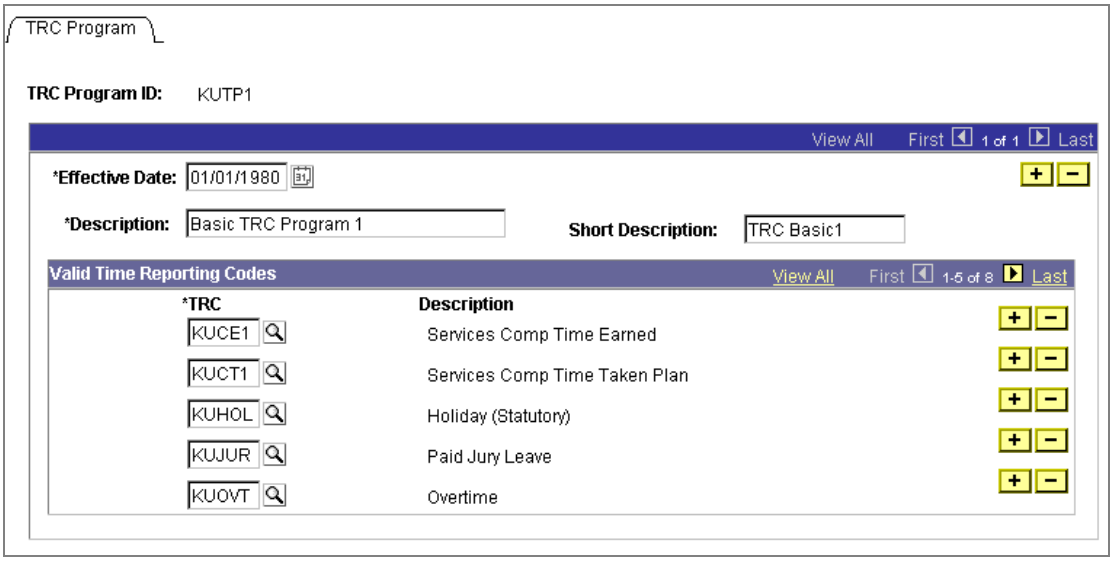
1. Name the TRC program.
2. Select TRC values for the program.
3. Copy a TRC Program to create another.

Pages Used to Define a TRC Program

Page Name	*Object Name*	*Navigation*	*Usage*
TRC Program	TL_TRC_PGM_PNL	Define Business Rules, Define Time and Labor, Setup1, TRC Program	Define TRC's that will belong to a TRC Program.
Copy TRC Program	TL_TRC_SAVE_AS_PNL	Define Business Rules, Define Time and Labor, Setup 1, Copy TRC Program	Copy a Time Reporting Code Program to use when creating a new Time Reporting Code Program. You must first define your Time Reporting Codes using the TRC Setup Page, and then your TRC Programs using the TRC Program Page.

Selecting Valid TRCs for a TRC Program

Access the TRC Program page.



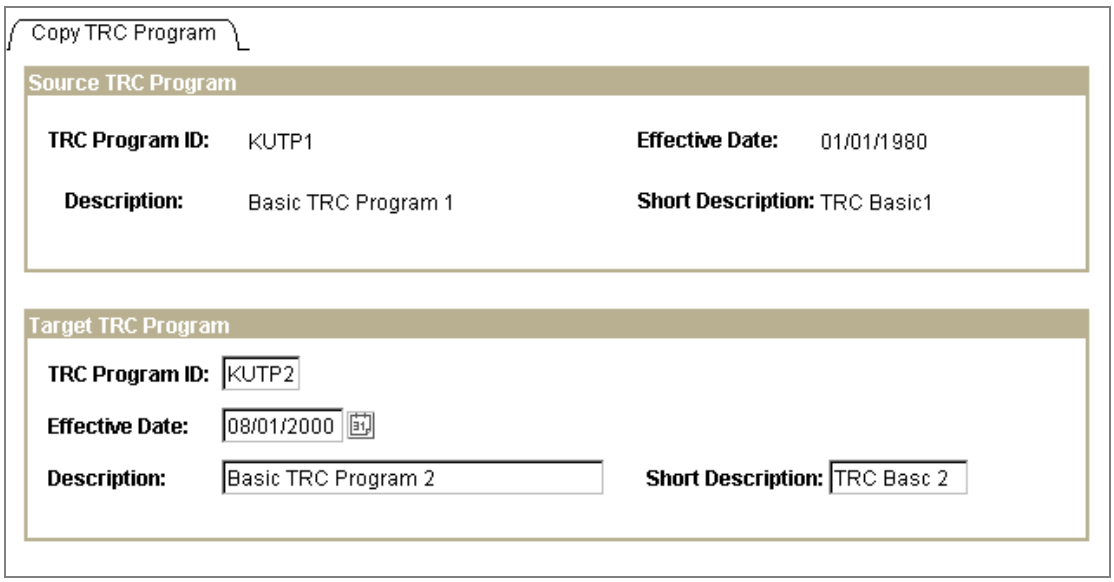
TRC Program page

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

TRC Select the **TRC**s 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.

Copying a TRC Program Page

Access the Copy TRC Program page.



Copy TRC Program page

Source TRC Program

The Source TRC Program group box will display the following information:

- The TRC Program ID from which you want to copy values for your Target TRC Program.
- The Effective Date for this row of the TRC Program ID.
- The Description.
- A 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.

Defining Units of Measure

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

If you interface with PeopleSoft Projects, you establish 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.

You determine whether to display the fields on the Units of Measure page by selecting or deselecting the **Interface with PS/Projects** check box on the TL Installation page. If the

check box is selected, the fields are unavailable for entry. If **Interface with PS/Projects** is cleared, the fields on the page are available for entry.

See Also

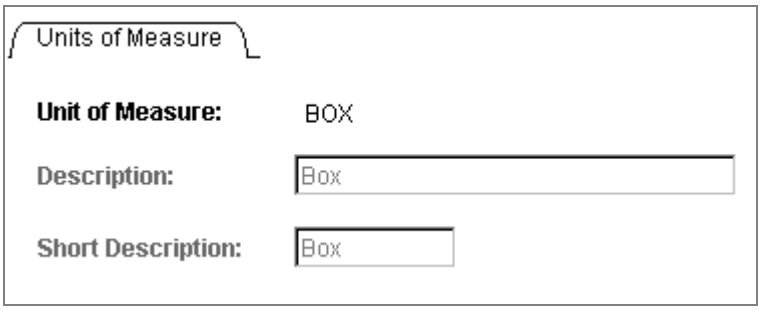
"Setting Up Basic Tables," Setting Up System Defaults and Loading Dates

Pages Used to Define Units of Measure

Page Name	*Object Name*	*Navigation*	*Usage*
Unit of Measure	TL_UNITS_PNL	Define Business Rules, Define Time and Labor, Setup 1, Unit of Measure	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.

Naming Units of Measure

Access the Units of Measure page by entering the name of the UOM you will use.



Units of Measure page

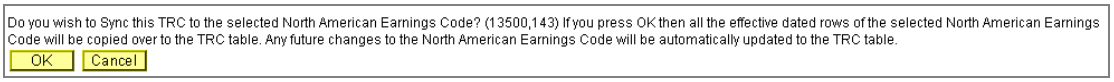
Unit of Measure The system displays the Unit of Measure Code you entered to access this page.

Working Through TRC Examples

The following examples illustrate how to synchronize Time and Labor TRCs with different kinds of earnings codes.

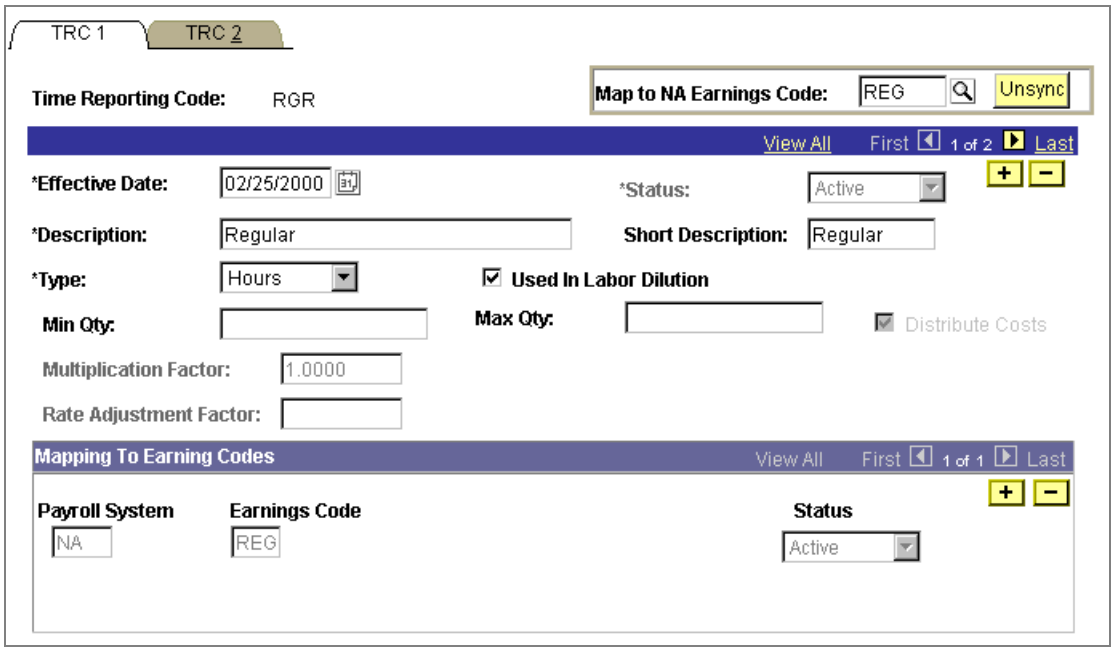
Synchronizing an Hours Type TRC (RGR) to a NA Earnings Code (Hours Only) of REG

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



- 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.



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

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

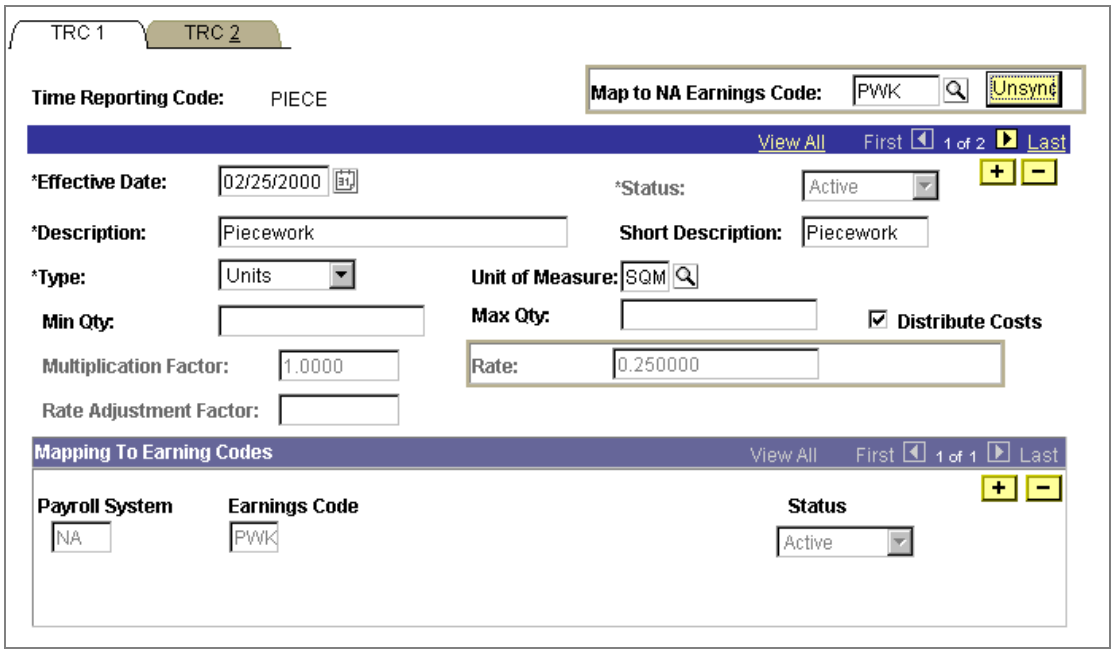
- The Description and Short Description from the NA Earnings Code
- The Multiplication Factor from Earnings Table 3.
- The Default value of the Add to Gross Pay on Earnings Table 2 populates the Distribute Costs Flag.
- The Status of the TRC defaults to Active.
- The Mapping to Earnings Code section 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 page synchronized to Piecework Earnings Code

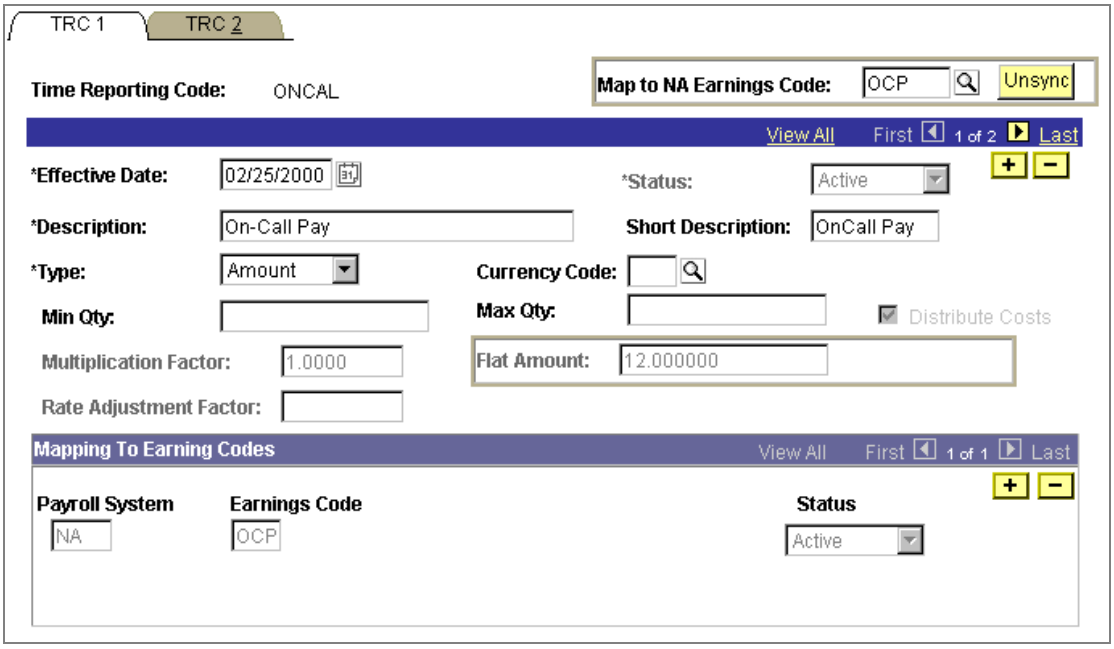
The following fields and their values are inherited from the NA Earnings Code

- 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:

- 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.



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.

See Also

"Integrating With Payroll Applications," Overview of Payroll Integration, Labor Distribution and Dilution

CHAPTER 6

Defining Task Reporting Requirements

This chapter gives an overview of task reporting functionality and tells you how to:

- Define task reporting templates.
- Create task profiles.
- Create taskgroups.
- Assign taskgroups, task templates and task profiles.

Understanding 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.

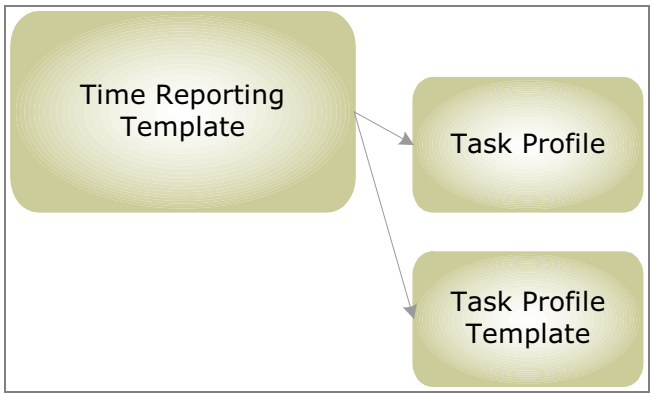
Taskgroups serve another important function: they are the means by which you assign default time reporting templates to time reporters. So, even if you're not interested in capturing task data for time reporters, you need to create taskgroups and assign a taskgroup to each time reporter.

See Also

"Reporting Time," Creating Time Reporting Templates

Understanding Task Functionality

Task reporting is a subset of time reporting. 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.



Time reporting templates identify how task data will be collected

Understanding Task Reporting Tools

You will use a group of task oriented tools 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.

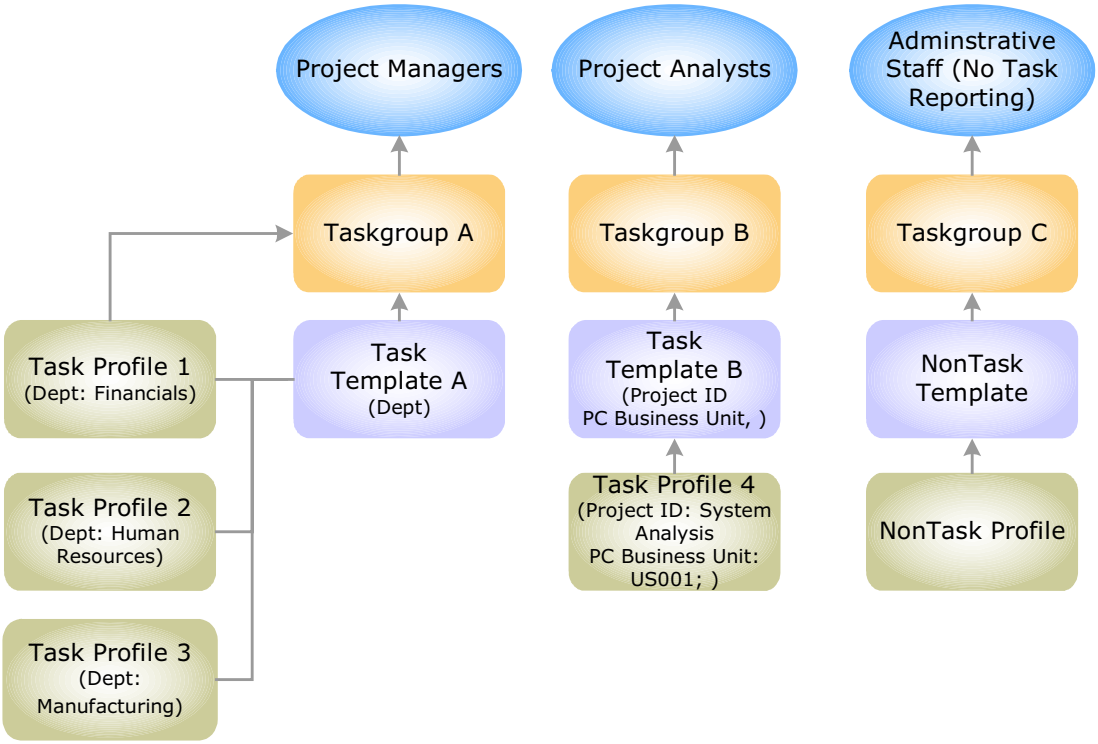
Taskgroup

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 diagram represents the relationships between time reporters, taskgroups, task templates, and task profiles.



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

Understanding Types of Task Reporting

PeopleSoft Time and Labor supports two types of task reporting:

- Task template reporting.

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

- 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. Task profile reporting is appropriate for time reporters who perform the same sets of tasks, where cost allocation is static. 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.

If you do not capture task data for some or all time reporters, you can use the nontask templates delivered with Time and Labor.

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.

See Also

"Reporting Time," Creating Time Reporting Templates

Defining Taskgroups

Understanding How to Create Task Values in Time and Labor

For each type of task data you want to track in Time and Labor, you must set up 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.

See Also

"Integrating With PeopleSoft Financials," PeopleSoft Projects Integration

Understanding 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.

Time and Labor	*Human Resources*	*Projects*	*Enterprise Performance Management*
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.

Task Entity	*Table*	*Navigation*
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.

Task Entity	*Table*	*Navigation*
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.

Task Entity	*Table*	*Navigation*
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

Task Entity	Table	Navigation
User Fields 1 - 5	TL_USER_FIELD_ 1-5	Define Business Rules, Define Time and Labor, Setup2, User Field1-5

Note. 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.

Understanding 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.

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. • Inactivate a taskgroup that is assigned to a time collection device (TCD) on the TCD Taskgroup page. • Delete an effective-dated row if it invalidates the association to a time reporter. • 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. • 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

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Understanding Task Reporting with PeopleSoft Financials

PeopleSoft Projects

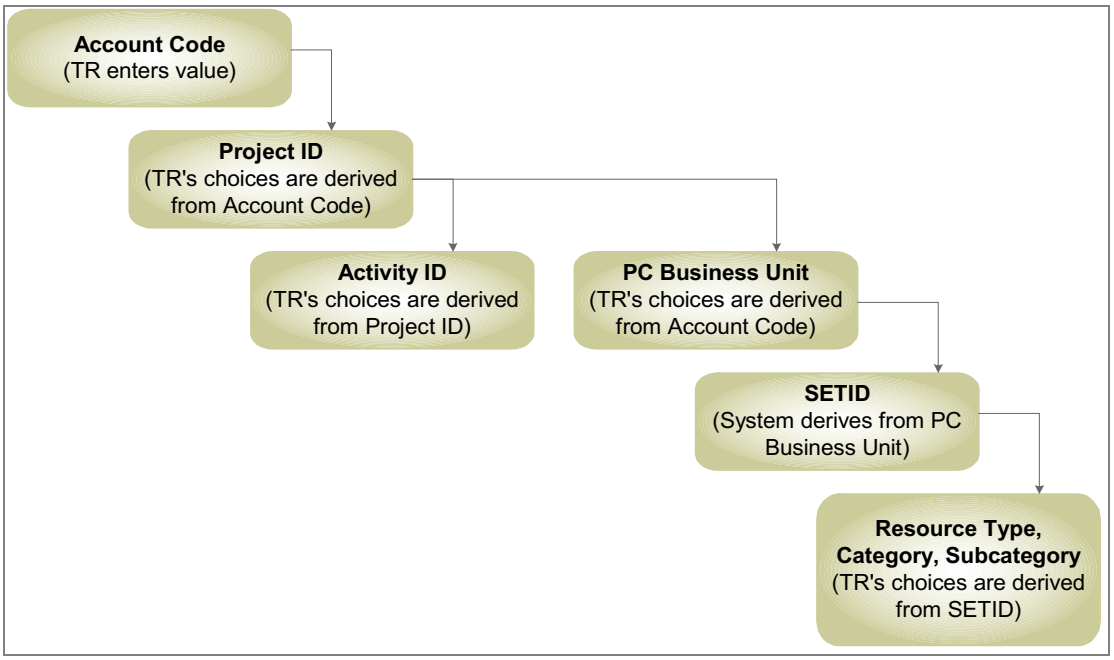
When you integrate PeopleSoft Time and Labor with PeopleSoft Projects, you have additional options for tracking time at the task level. You can track time by business unit; by the projects and activities defined in PeopleSoft Projects; and by resource type, resource category, and resource sub-category. 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

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.



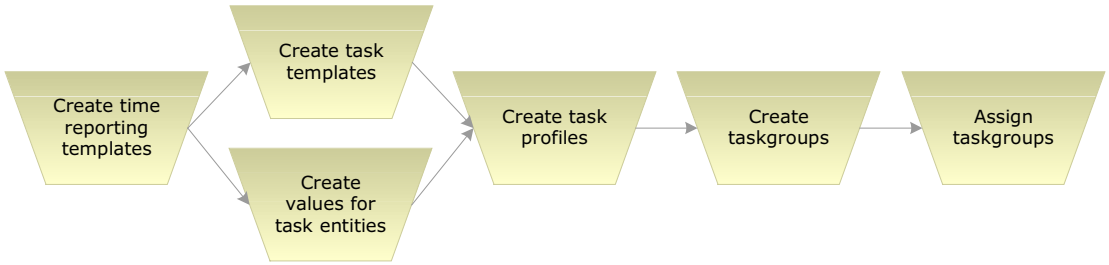
Task values derived from the account code when commitment accounting is enforced

See Also

"Integrating With PeopleSoft Financials," PeopleSoft Projects Integration and Commitment Accounting

Understanding the 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.

Note. 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 both elapsed and punch-time employees—employees and non-employees—as long as the same task entities apply to everyone in the taskgroup.

See Also

"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data

"Using Time Collection Devices (TCDs)"

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.

Production Mode?	*Template Assigned to Taskgroup?*	*Changes Permitted*
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.

See Also

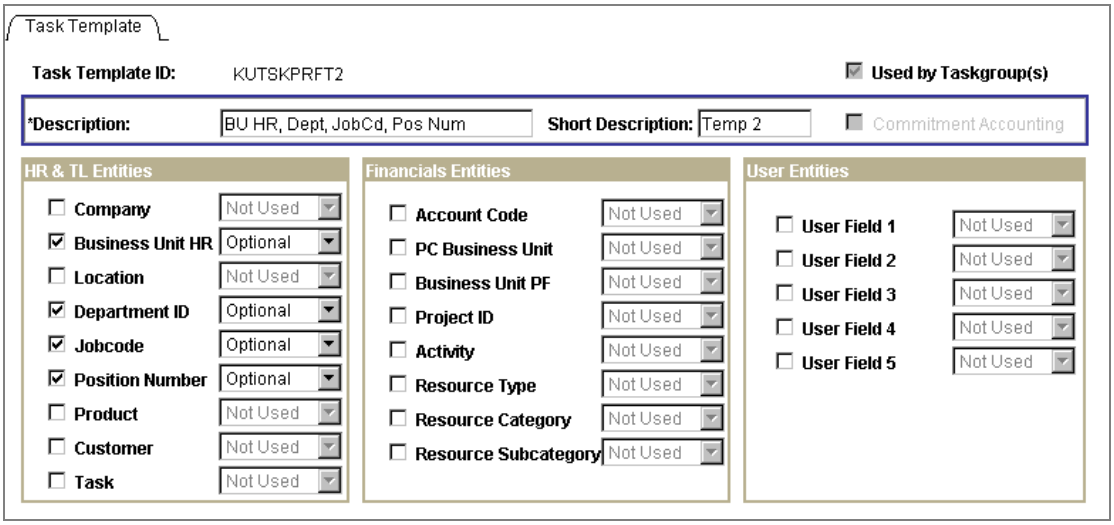
"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Pages Used to Create Task Templates

Page Name	*Object Name*	*Navigation*	*Usage*
Task Template	TL_TSKPRF_TMPLATE	Define Business Rules, Define Time and Labor, Setup 2, Task Template	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).

Creating a Task Template

Access the Task Template page.



Task Template page

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.

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.

See Also

"Integrating With PeopleSoft Financials," Commitment Accounting

Understanding How to Create Task Values in Time and Labor

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.

Note. 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.***

Defining and Viewing Task Values in PeopleSoft Time and Labor

As noted earlier, task values for Time and Labor prompt tables can be defined in PeopleSoft Time and Labor as well as in PeopleSoft Human Resources, Projects, and Enterprise Performance Management. In the following sections we discuss:

- PeopleSoft Time and Labor pages used to define task values.

PeopleSoft Time and Labor is delivered with empty prompt tables for the following task values: Customer, Task, Product, Project, Activity, and up to five user-defined fields.

- How to create valid values using Time and Labor pages.

- How to view the values defined in PeopleSoft Projects and Enterprise Performance Management.

See Also

Understanding How to Create Task Values in Time and Labor

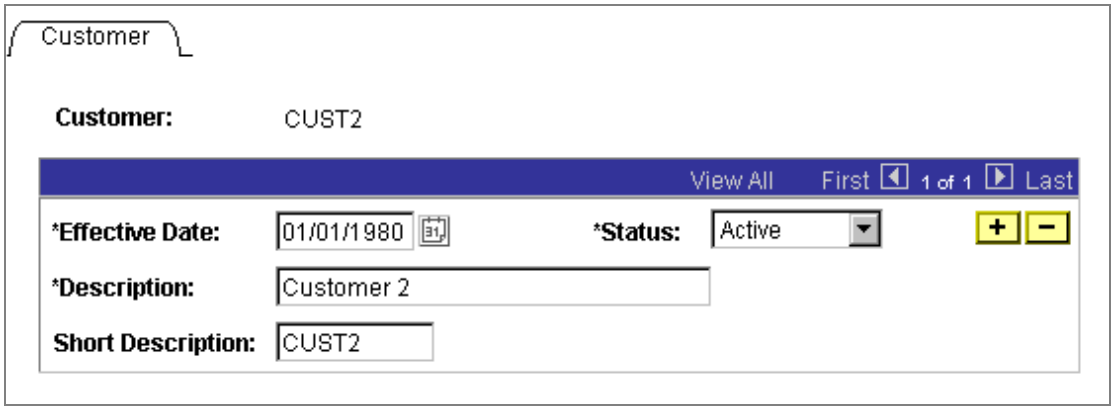
Pages Use to Define and View Task Values

Page Name	*Object Name*	*Navigation*	*Usage*
Customer	TL_CUSTOMER	Define Business Rules, Define Time and Labor, Setup 2, Customer	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.
Task	TL_TASK	Define Business Rules, Define Time and Labor, Setup 2, Task	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.
Product	TL_PRODUCT_TBL	Define Business Rules, Define Time and Labor, Setup 2, Product	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.

Page Name	*Object Name*	*Navigation*	*Usage*
Project	TL_PROJECT	Define Business Rules, Define Time and Labor, Setup 2, Project	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.
Activity ID	TL_ACTIVITY	Define Business Rules, Define Time and Labor, Setup 2, Activity ID	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.
User Field 1	TL_USER_FIELD#_PNL, where # equals 1, 2, 3,4, or 5	Define Business Rules, Define Time and Labor, Setup 2, User Field 1	Use the User Fields page to create your custom task-reporting elements.

Creating and Viewing Codes for Customers

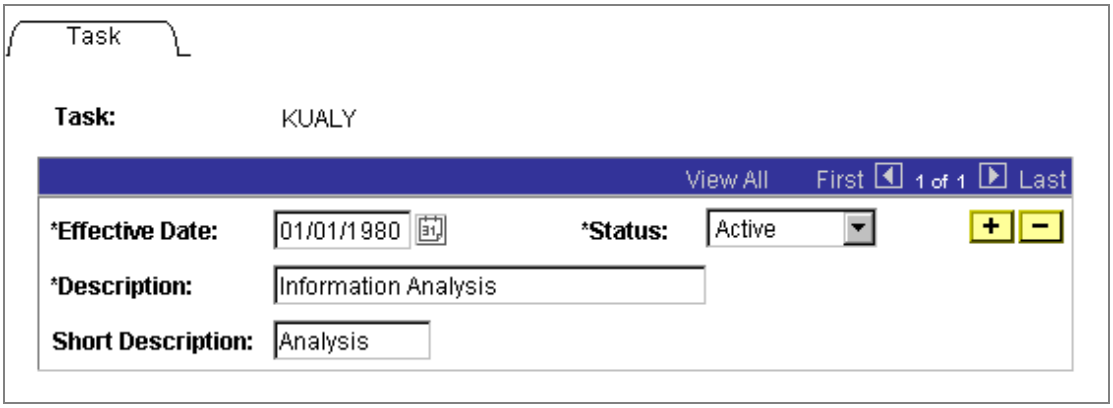
Access the Customer page.



Customer page

Creating and Viewing Codes for Tasks

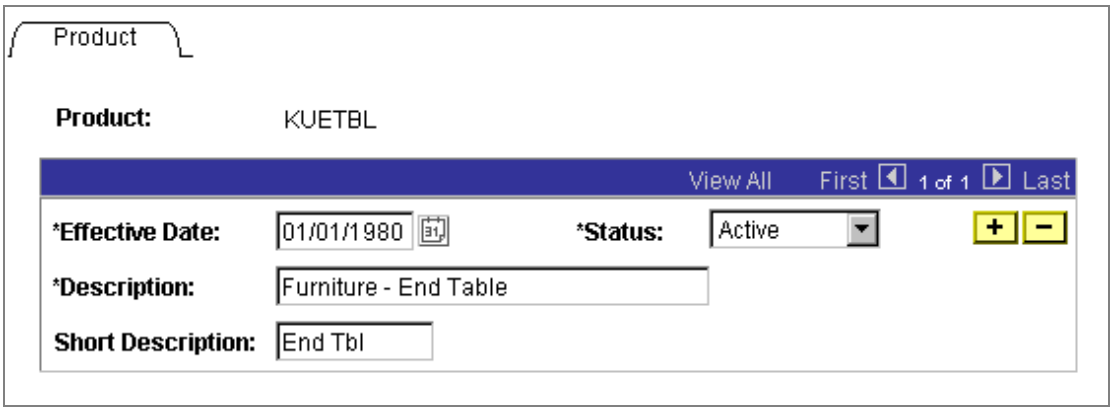
Access the Task page.



Task page

Creating and Viewing Codes for Products

Access the Product page.



Product page

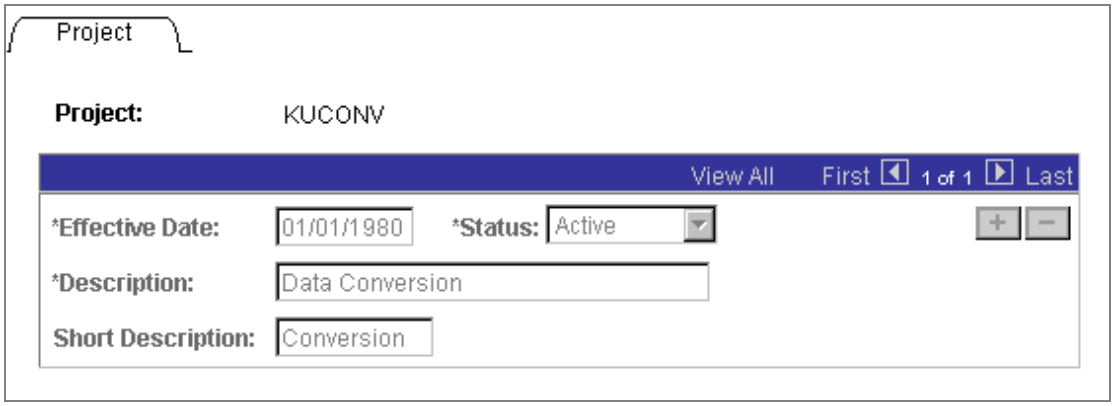
Creating and Viewing Codes for Projects

Access the Project page.

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.



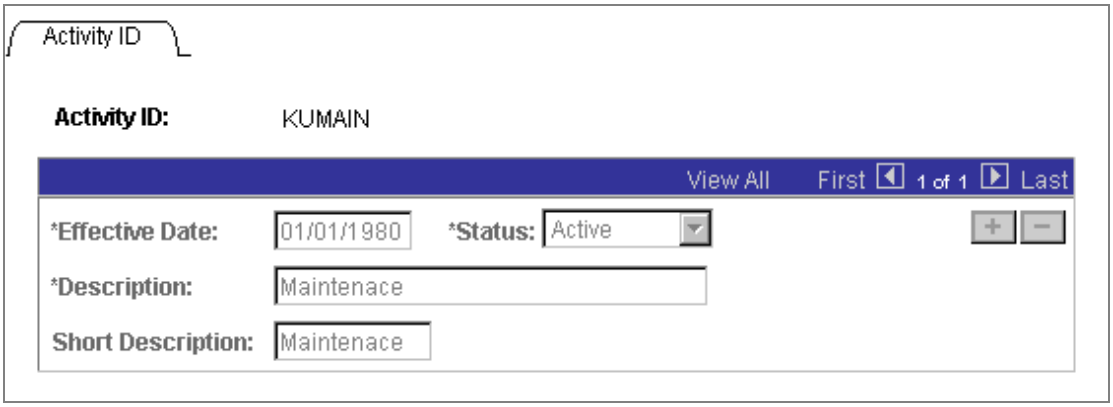
Project page

Creating and Viewing Activity ID Codes

Access the Activity ID page.

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

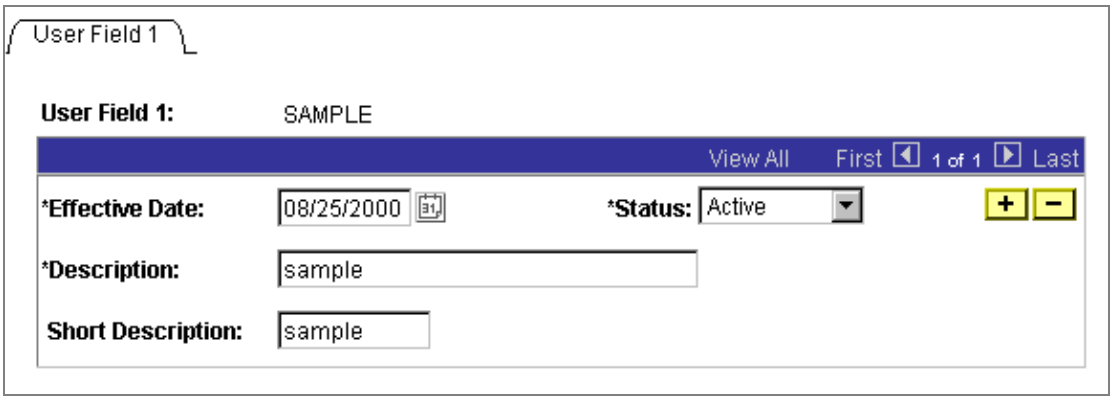
Creating and Viewing User Fields

Access the User Field 1-5 page.

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 2	10 alphanumeric characters
User Field 3	15 alphanumeric characters
User Field 4	20 alphanumeric characters
User Field 5	20 alphanumeric characters

If you want to re-label the user fields, see the instruction in your *PeopleTools PeopleBook.*



User Field 1 page

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.

See Also

"Integrating With PeopleSoft Financials "

Pages Used to Display Task Codes in PeopleSoft Projects and Enterprise Performance Management

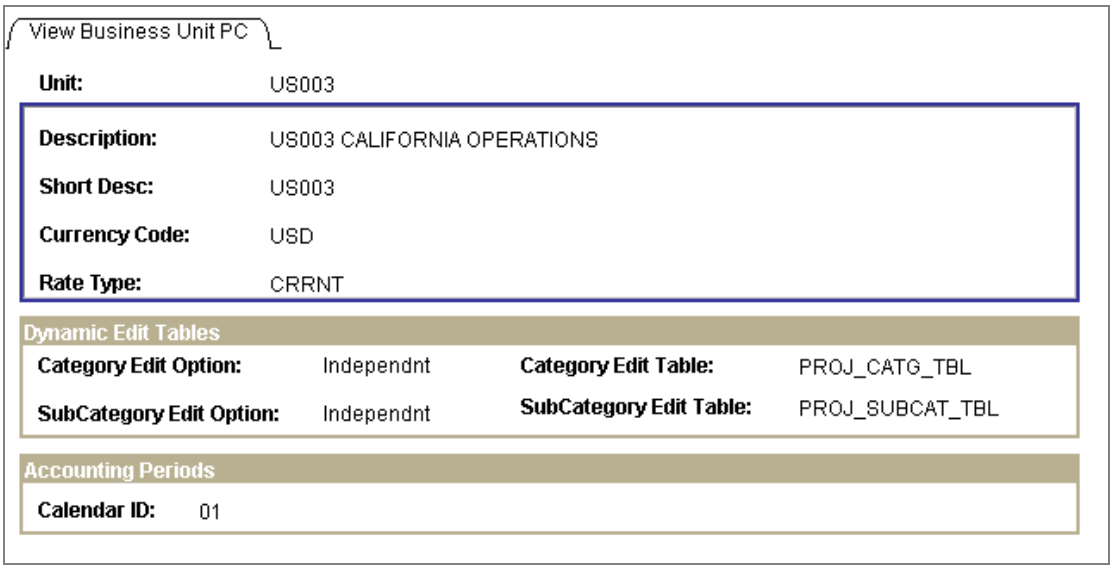
Page Name	*Object Name*	*Navigation*	*Usage*
View Business Unit PC	TL_BUS_UNIT_TBL_PC	Define Business Rules, Define Time and Labor, Setup 2, Business Unit	Display business unit criteria define through PeopleSoft Projetcs.
PC Project Descr	TL_PROJECT_PC	Define Business Rules, Define Time and Labor, Setup 2, PC Project	Display project codes defined through PeopleSoft Projects.
Team Members	PROJECT_TEAM_01	Define Business Rules, Define Time and Labor, Setup 2, PC Project	Display project information created through PeopleSoft Projects.
View Project Activity	PC_PROJ_ACTIVITY	Define Business Rules, Define Time and Labor, Setup 2, PC Activity ID, View Project Activity`=	View the activity codes defined in PeopleSoft Projects.
View Project Resource Type	PROJ_RES_DEFN	Define Business Rules, Define Time and Labor, Setup 2, Resource Type	View resource type codes defined in PeopleSoft Projects,
View Project Resource Category	PROJ_CATG_DEFN	Define business rules, Define Time and Labor, Setup 2, Resource Category	View resource category codes defined in PeopleSoft Projects,

Page Name	Object Name	Navigation	Usage
View Project Resource Sub Catg	PROJ_SUBCA_DEFN	Define Business Rules, Define Time and Labor, Setup2, Resource Sub-Category	View resource sub-category codes defined in PeopleSoft Projects,
View Business Unit PF	TL_BUS_UNIT_TBL_PF	Define Business Rules, Define Time and Labor, Seup 2, Business Unit PF	View business unit codes defined in PeopleSoft Enterprise Performance Management.
View FS Activity	FS_ACTIVITY_TBL1	Define Business Rules, Define Time and Labor, Setup 2, FS Activity	View activity codes defined in PeopleSoft Enterprise Performance Management.

Displaying Business Unit Information

Access the View Business Unit PC page.

The PC Business Unit pages display business unit information defined in PeopleSoft Projects, if this application is installed.



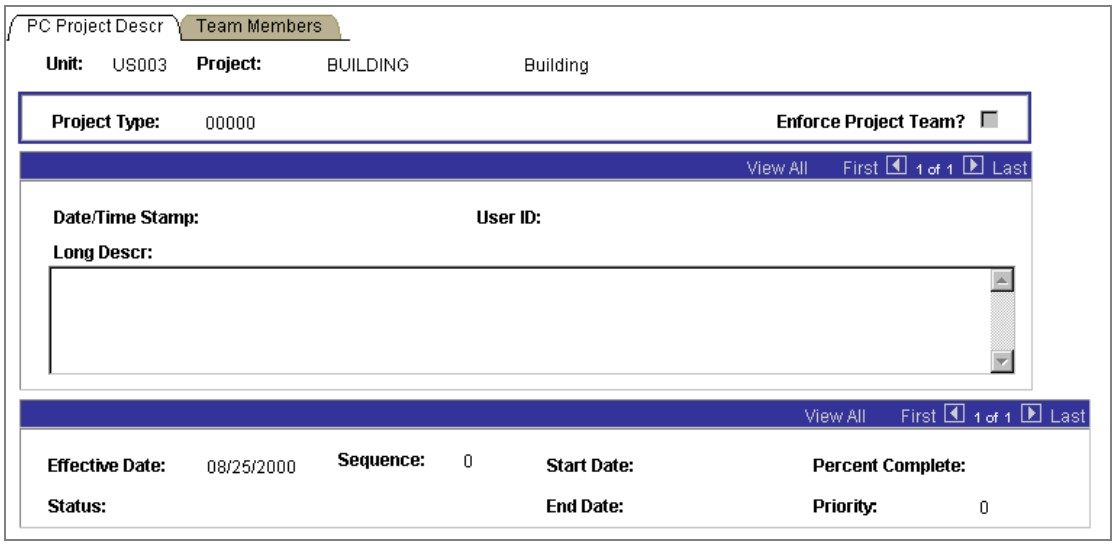
View Business Unit PC page

See Also

PeopleSoft Projects PeopleBook

Displaying Project Codes

Access the PC Project Descr page.



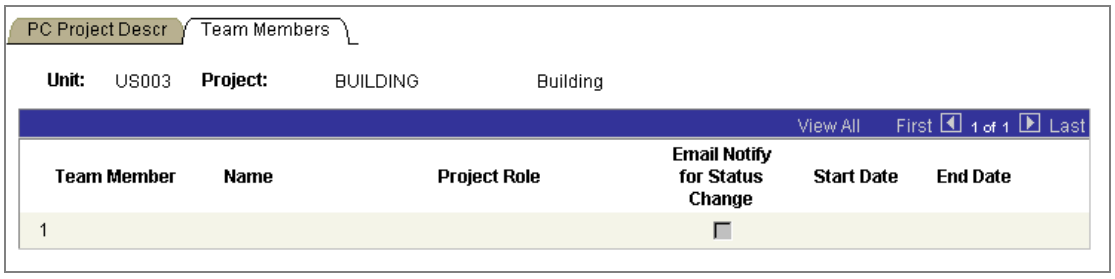
PC Project Descr page (PC Project Description page)

See Also

PeopleSoft Projects PeopleBook

Displaying Project Information on the Team Members Page

Access the Team Members page.



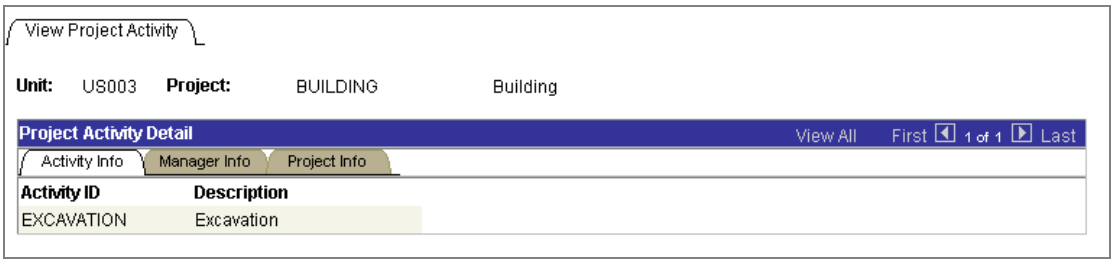
Team Members page

See Also

PeopleSoft Projects PeopleBook

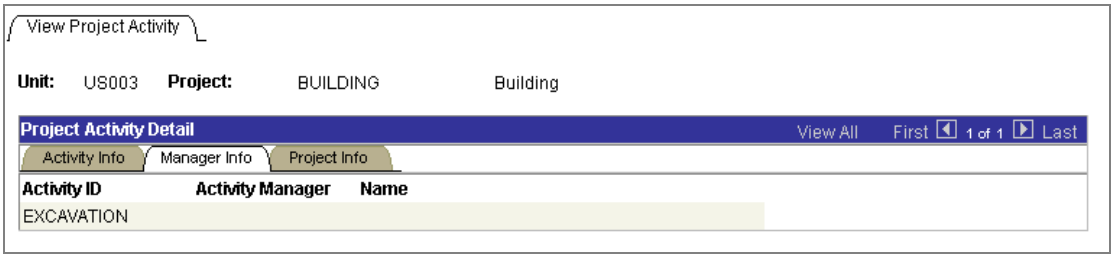
Displaying Project Activity Codes

Access the View Project Activity page.



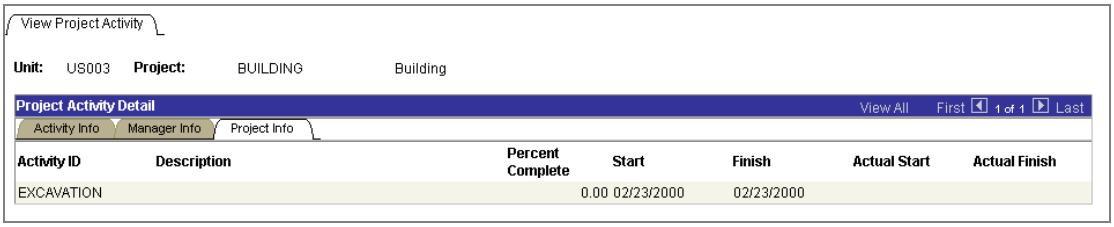
View Project Activity: Activity Info tab (Activity Information tab)

View Project Activity: Manager Info Tab



View Project Activity: Manager Info tab (Manager Information tab)

View Project Activity: Project Info Tab



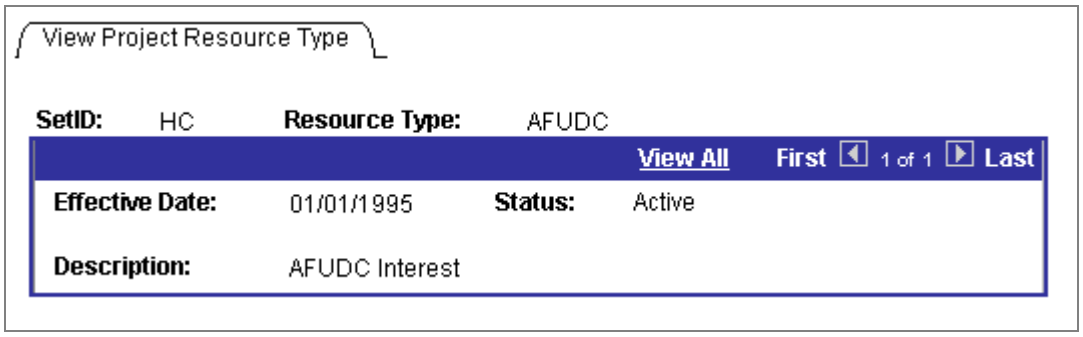
View Project Activity: Project Info tab (Project Information tab)

See Also

PeopleSoft Projects PeopleBook

Displaying Resource Type Codes

Access the View Project Resource Type page.



View Project Resource Type page

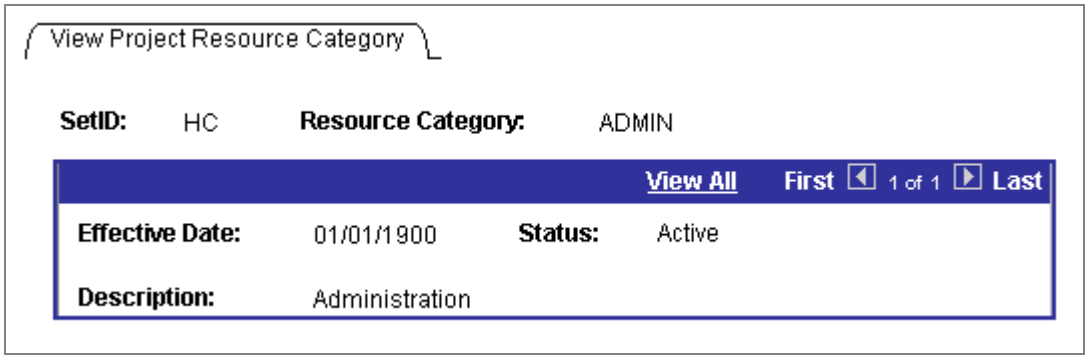
Resource type codes are applicable only if you are using PeopleSoft Projects. You can use the Resource Type page to view any resource codes defined in PeopleSoft Projects but not to update them.

See Also

PeopleSoft Projects PeopleBook

Displaying Resource Category Codes

Access the View Project Resource Category page.



Project Resource Category page

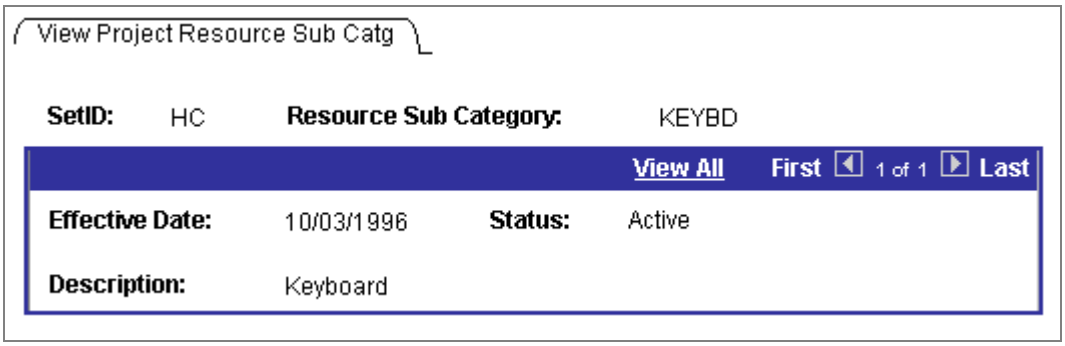
Resource category codes are applicable only if you're using PeopleSoft Projects. You can use the Resource Category page to view any resource category codes defined in PeopleSoft Projects.

See Also

PeopleSoft Projects PeopleBook

Displaying Resource Sub-Category Codes

Access the View Project Resource Sub Catg page.



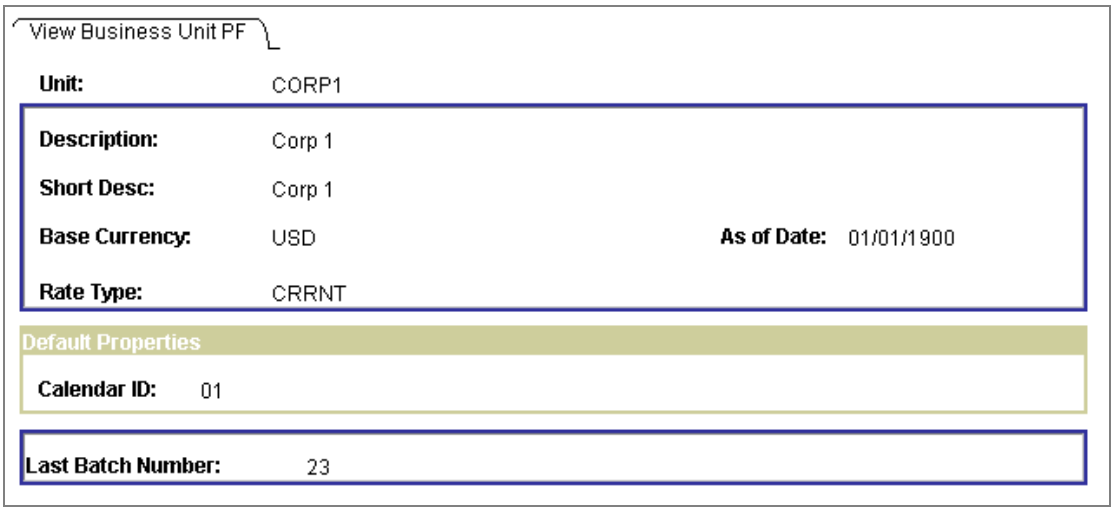
View Project Resource Sub Catg page (View Project Resource Sub-Category page)

See Also

PeopleSoft Projects PeopleBook

Displaying Business Unit Codes

Access the View Business Unit PF page.



View Business Unit PF page

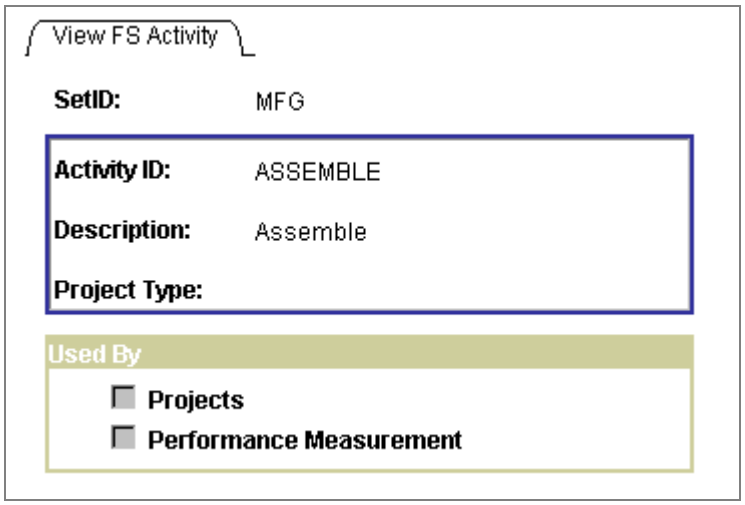
Business Unit PF codes are applicable only if you are using PeopleSoft Enterprise Performance Management and you are not using People Soft Projects. You can use the Business Unit PF page to view any business units defined in Enterprise Performance Management but not to update them.

See Also

PeopleSoft Enterprise Performance Management PeopleBook

Displaying Activity Codes

Access the View FS Activity page.



View FS Activity page

See Also

PeopleSoft Enterprise Performance Management PeopleBook

Creating 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.

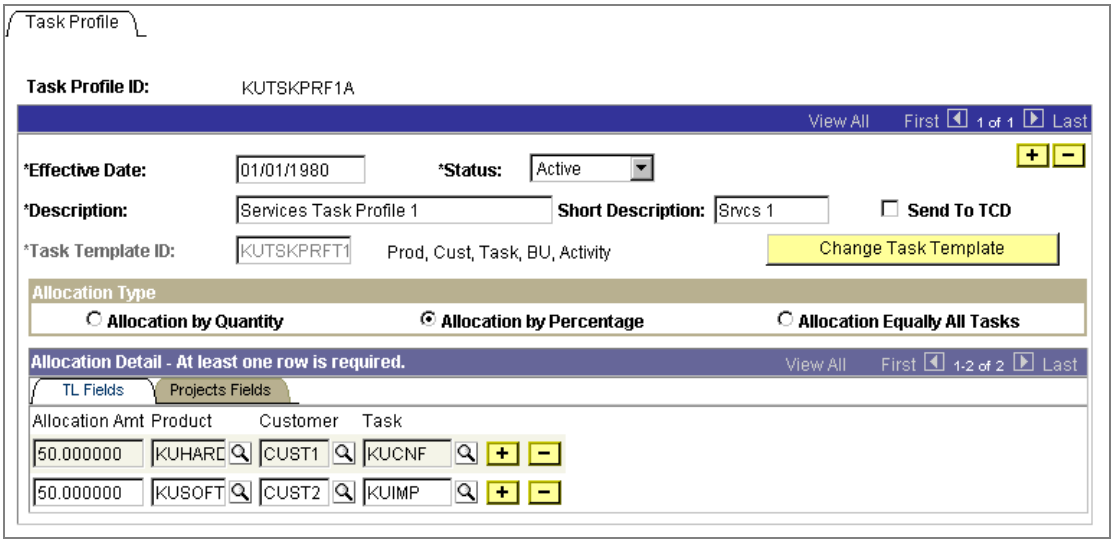
Pages Used to Create Task Profiles

Page Name	Object Name	Navigation	Usage
Task Profile	TL_TASK_PROFILE	Define Business Rules, Define Time and Labor, Setup 2, Task Profile	Define task profiles.

Creating task profiles.

Access the Task Profile page.

Use this page to select 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.



Task Profile page

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.

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.

Warning! 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. 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 to enter a quantity (hours, units, or amount) for each task. The system will 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 to specify the percentage of hours, units or amounts the system should allocate to each reported task.

Allocation Equally All Tasks — Select this option to automatically 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

Note. 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.

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.

See Also

"Using Time Collection Devices (TCDs)"

Understanding How to Create Task Values in Time and Labor

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 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.

See Also

"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data

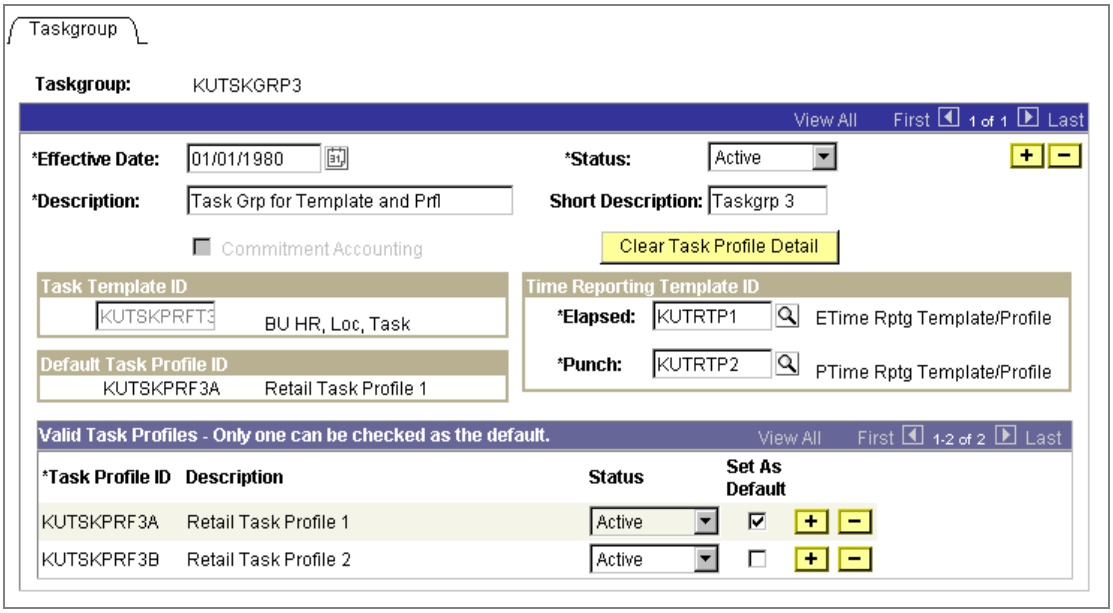
"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

Pages Used to Define Taskgroups

Page Name	*Object Name*	*Navigation*	*Usage*
Taskgroup	TL_TASKGROUP_TBL	Define Business Rules, Define Time and Labor, Setup 2, Taskgroup	Define taskgroups.

Defining a Taskgroup

Access the Taskgroup page.



Taskgroup page

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.

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 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.

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.

See Also

"Reporting Time," Creating Time Reporting Templates

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.

See Also

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting

CHAPTER 7

Defining Work Schedules

This chapter provides an overview of work schedules and discusses how to:

- Create work schedules, schedule templates, and schedule definitions.
- Build schedule calendars.
- View schedule calendars.
- Import third-party schedules.

See Also

"Setting Up Time Reporters," Assigning Schedules

Understanding Work Schedules

In PeopleSoft Time and Labor you can define three 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, eight hours on Monday. Flex schedules are practical when a time reporter has some flexibility to begin and end the workday. Creating schedules for time reporters is a two-part process: creating schedule calendars and assigning time reporters to schedule calendars.

Work schedules have several functions:

- To provide a facility to create, view, and manage a time reporter's schedule.
- To communicate and manage work expectations.
- To enable estimates of labor costs.
- 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.

Note. Scheduling does not administer workforce scheduling. It does not create time and does not apply rules.

Schedule Calendars

A schedule calendar is a range of dates that has specified work and nonwork time. Set up schedule calendars during implementation or when there are additions or changes to the existing schedules.

Example: Schedule Calendar

Date Under Report	*Workday ID*	*Description*
17 December 2000	OFF	Off
18 December 2000	KUELPDAY1	Elapsed 8 Hour Day
19 December 2000	KUELPDAY1	Elapsed 8 Hour Day
20 December 2000	KUELPDAY1	Elapsed 8 Hour Day
21 December 2000	KUELPDAY1	Elapsed 8 Hour Day
22 December 2000	KUELPDAY1	Elapsed 8 Hour Day
23 December 2000	OFF	Off

To create schedule calendars:

1. Create shifts.

   Shifts are the 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.

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. Create a shift by entering a shift type and the detail in the shift. You can create three types of shifts: elapsed, punch, and flex.

Elapsed Shifts

Define a single elapsed punch entry for the shift. For example, you create an elapsed shift of 8 hours. The 8 hours is nonclock time. Elapsed shifts cannot exceed 24 hours.

Punch Shifts

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. Enter the duration of a punch, or the system can calculate the duration when the time for the next punch is entered.

Flex Shifts

A flex shift is a working arrangement with latitude for when the time reporter begins and ends the shift. Enter core hours (required hours of work) according to your organization's business rules and the weekly number of hours that the flexible shift requires. Flex shifts cannot exceed 24 hours.

Example: Flex Shifts

Type of Flex Shift	In Punch	Out Punch	Scheduled Hours	Flex Start	Flex End	Flex Weekly Hours
1 Flex Band	06:00	18:00	8	09:00	15:00	40
2 Flex Range	06:00	19:00	8			40
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 (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 (any time between 06:00 and 19:00). There is no company-defined core period. They must work 40 hours a week.

3. Time reporters may work any time during the week, provided that they work 40 hours during the company-established core hours (09:00-15:00). They can vary their begin and end times on a daily basis within the established flexible hours and may vary the length of the workday, provided that they meet the weekly 40-hour requirement.

4. Time reporters must work 40 hours a week 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 between 15:00 and 17:00.

Workdays

A workday is the component of the schedule calendar that identifies which shifts are worked on that day. As with shifts, workdays can be of three main types: elapsed, flex, or punch. A workday usually includes one shift, but elapsed and punch workdays may contain more than one shift.

The reason for the shift and workday components to define a day of work is to allow for flexible, efficient schedule setup. For example, a school bus driver schedule might contain a combination of morning and afternoon shifts. Some people might work only mornings, some people might work only 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.

To combine workdays to create schedule templates, you will need a placeholder workday for days off. PeopleSoft provides a nonwork day (an Off day) that cannot be edited.

Schedule Templates

A schedule template represents a pattern of work and nonwork days. This pattern is built with workdays and an Off day. While the pattern is not yet associated to any dates, think of the organization's work patterns when creating the templates. For example, if some time reporters work seven days a week, with Saturday and Sunday off, create a template that has one Off day, five workdays, and then one Off day.

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 time reporters work Monday through Friday 09:00-18:00, with Saturday and Sunday off; and some, Tuesday through Saturday 09:00-18:00, with Sunday and Monday off. Use the same seven-day template for both schedules: two Off days and five workdays. Before implementing schedule templates, thoroughly analyze the various workday patterns of the organization.

Note. Because templates are not effective-dated, the impact of a template change appears when the schedule calendar is extended or rebuilt. You can disrupt the pattern of schedule calendars that use changed templates.

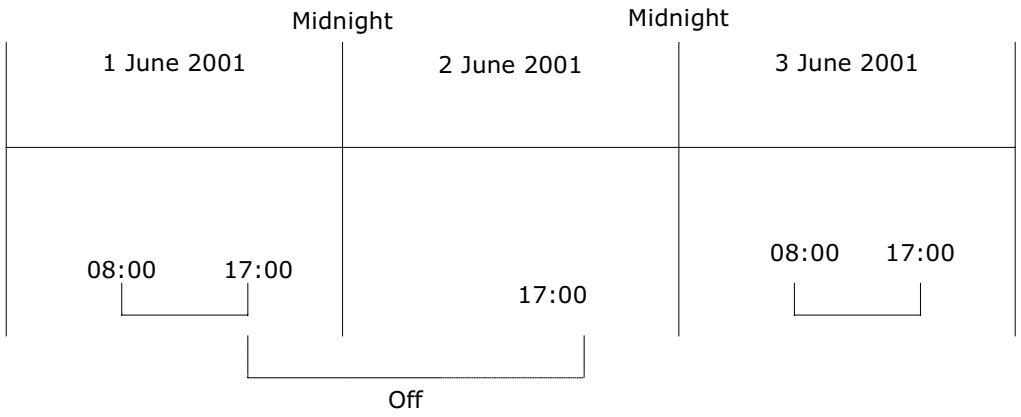
During the schedule calendar build process, the system recognizes the Off day as a twenty-four hour period of nonwork time. For an elapsed schedule, that means that for any date that is a scheduled Off day, the period between 00:00 and 23:59 is nonwork time.

Punch shifts are treated differently. The two examples below illustrate how three days of a template can be spread our over three or two calendar dates depending on the hours associated with the template workdays.

Example 1: Punch Shift Template

Template Day	*Workday ID*	*Hours of Shift Associated With Workday*
Day One	DAYS	08:00-17:00
Day Two	OFF	(none)
Day Three	DAYS	08:00-17:00

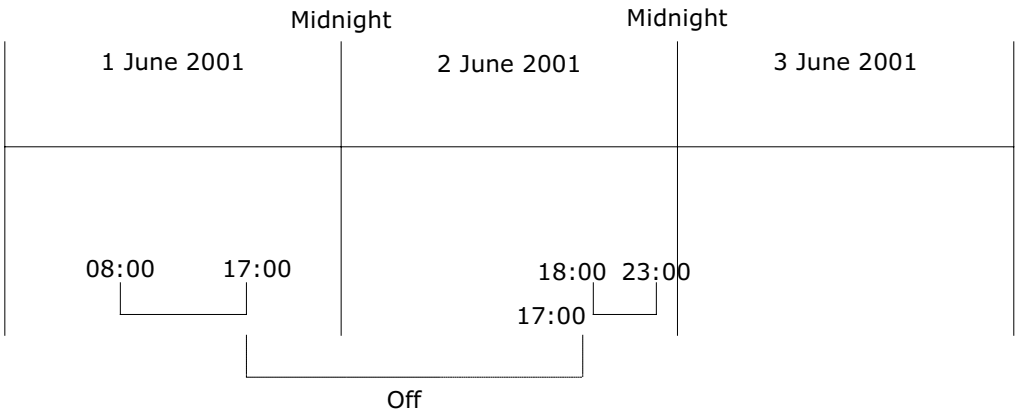
If you include this template in a schedule definition and build a schedule calendar that begins 1 June 2001, the schedule calendar looks like this:



Example 2: Punch Shift Template

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:



If there are no Off days in the template at save time, you receive a warning that the template contains no Off days. If there are only Off days in the template at save time, you will receive a warning that the template contains only Off days. There must be at least one row of workday ID detail to save the template.

Schedule Definitions

Schedule definitions define one or more schedule templates to build into a schedule calendar. Use schedule definitions to combine schedule templates to produce a single schedule of work expectations over a period of time: a rotating work schedule.

For instance, the schedule definition could be composed of a template representing a five-day, 08:00 to 17:00 workweek and a template representing a five-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 five-day, 08:00 to 17:00 workweek templates followed by one of the five-day, 08:00 to 18:00 workweek templates.

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.

Definitions are identified by a schedule ID. After creating a schedule definition, assign a time reporter to the corresponding schedule ID. Remember that you will not see schedule detail for that time reporter until the schedule calendar for that definition is built.

Schedule Calendars

The first time the calendar is built, 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 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 identified dates. 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 in the schedule calendar changes.

See Also

"Setting Up Time Reporters," Assigning Schedules

Creating Work Schedules, Schedule Templates, and Schedule Definitions

This task comprises four steps:

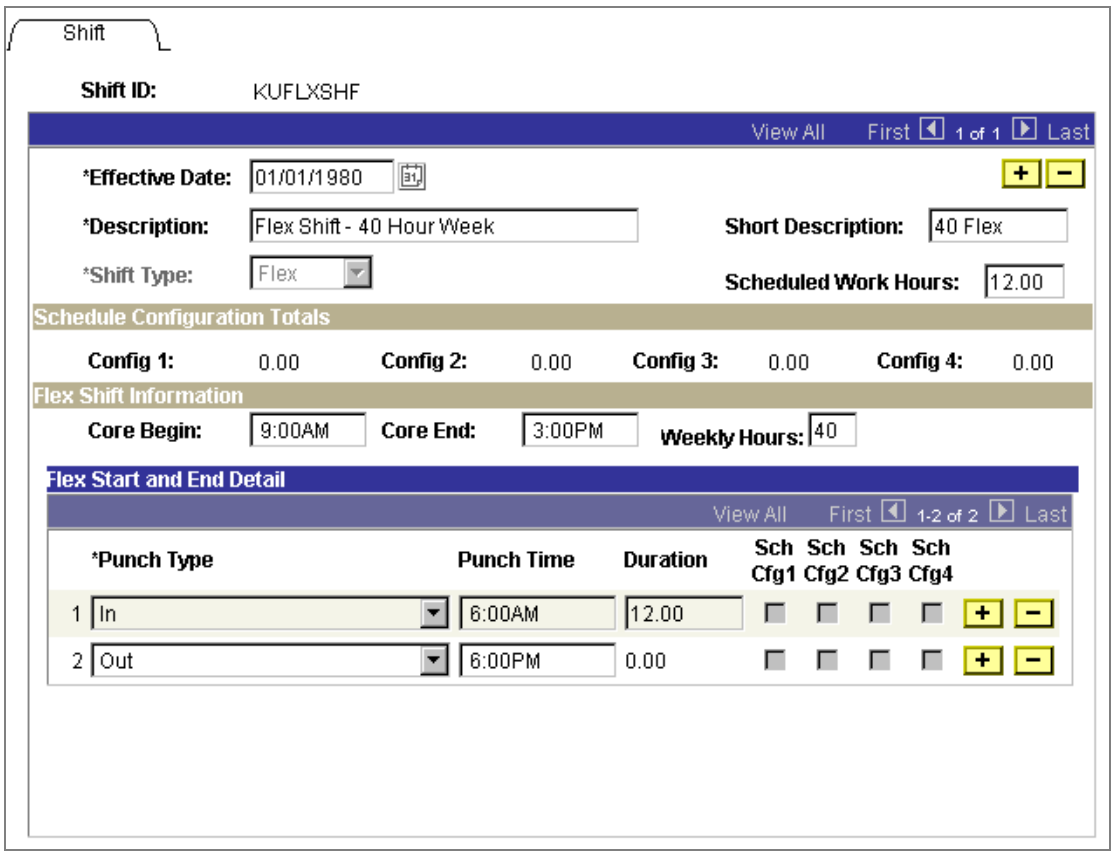
1. Set up shifts.
2. Define shifts associated with a workday.
3. Define a pattern of work and nonwork days that make a schedule template.
4. Identify schedule templates that will become a schedule.

Pages Used to Create Work Schedules, Schedule Templates, and Schedule Definitions

Page Name	*Object Name*	*Navigation*	*Usage*
Shift	SCH_SHIFT	Define Business Rules, Define Time and Labor, Schedule, Shift	To set up elapsed, flex, and punch shifts.
Workday	SCH_WRKDAY	Define Business Rules, Define Time and Labor, Schedule, Workday	To define the shifts associated with the workday.
Template	SCH_TMPLT	Define Business Rules, Define Time and Labor, Schedule, Schedule Template	To define a pattern of work and nonwork days.
Schedule Definition	SCH_DEFINITION	Define Business Rules, Define Time and Labor, Schedule, Schedule Definition	To identify one or more schedule templates that will be built into a schedule.

Setting Up Shifts

Access the Shift page.



Shift 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 cannot change the shift's effective date to a date earlier than the earliest effective date of all workdays containing that shift.
- You cannot change the shift's effective date to a date later than the start date of any schedule calendar that uses the effective date.
- You cannot change the shift's effective date to a date later than the earliest effective date of all workgroups with default schedule IDs containing that shift.

Shift Type

Select the type of shift you are creating. Valid options are: ***Elapsed, Flex, Punch.***

If you change this field while in Add mode, and punch detail has already been entered, you receive a warning that punch detail will be deleted if the **Shift Type** field is changed. The system deletes the punch details for all effective-dated rows. This field is updated, for all effective-dated rows, to the new type.

Once a shift is saved as one type, you cannot change it to another type of shift (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. Flex shifts require an In and Out punch to be saved.

Scheduled Work 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 isn't required to punch. The **Scheduled Work Hours** field displays nine hours, but your organization is paying for eight hours. In that case, the scheduled hours should be eight.

The system calculates the value in the **Scheduled Work Hours** field 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 value in the **Scheduled Work Hours** field will always equal the duration of the elapsed punch entry. The field cannot be changed.

If you modified a shift, the system, at save time, checks if the shift is used in any schedule calendars. If it is, then the schedule calendar will need refreshing. Use the View Schedule Refresh page to learn if the changes will affect an existing schedule calendar.

If you make any changes that affect punch time or punch duration, the system updates the value in the **Scheduled Work Hours** field. Review the **Scheduled Work Hours** field before saving changes to be sure the field contains the correct data.

For flex shifts, it is especially important for the **Scheduled Work Hours** field to contain the number of hours that time reporters are expected to work. The system uses the scheduled work hours value during Time Administration to determine the time to be worked.

Schedule Configuration Totals

PeopleSoft Global Payroll and PeopleSoft Time and Labor share schedule setup pages and records. However, these fields are only used by the Global Payroll system.

Flex Shift Information

Core Begin Enter the begin time for the core period, the time that 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 time that 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 Grid

The label for this grid varies according to the selected shift type. There must be at least one line of punch detail to save the shift.

Punch Type The terms *punch* and *punch type* are interchangeable. 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 the beginning of a shift, or 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 shifts cannot be saved if an In punch does not have a punch time and duration.

Transfer: Start of a work period that generally denotes a change in task and 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 to save the page. 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 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 nonwork time. For punch periods with a punch type of ***Out,*** the **Duration** field is unavailable. An Out punch cannot be entered without an In punch preceding it somewhere in the shift (edit at save time). Punch or flex shifts cannot be saved if an Out punch isn't entered or does not have a punch time. No additional punches can be added to a shift after the Out punch row.

Elapsed: This punch type is used only 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 that this punch is scheduled. 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.

Change the time of a punch other than the last punch and the duration changes accordingly, based on the new and the subsequent punch times. In addition, if the punch is not the first, the duration of the previous punch changes based on the changed punch's new time.

Enter a punch time and the system calculates the duration, based on the punch time of the previous row. Enter a duration and the system calculates the value in this field on the next punch row.

Duration

This field displays the duration of the punch period in hours. A user can enter it or the system can calculate it when the next punch time is entered.

Change the time of a punch, other than the last punch and the duration changes, based on the new and the subsequent punch time. If it is not the first punch, the duration of the previous punch changes, based on the 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.

Config 1-4 (configuration 1-4)

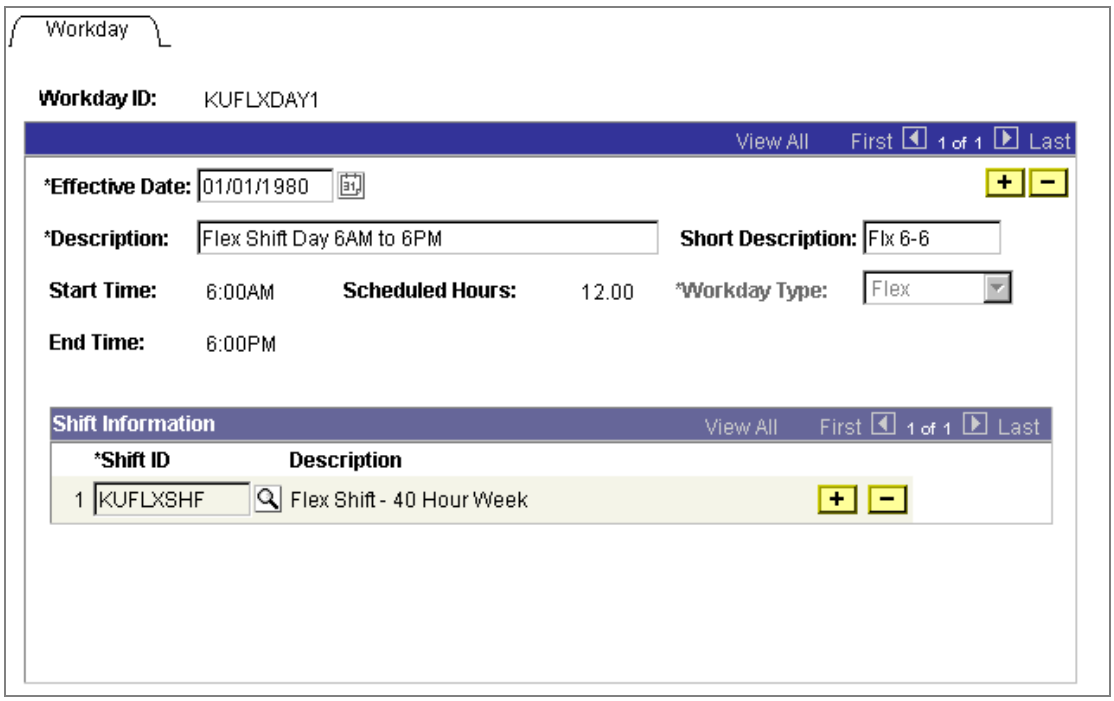
These fields are for use with PeopleSoft Global Payroll. If this product isn't installed, these fields are unavailable.

See Also

PeopleSoft Global Payroll PeopleBook, "Using Schedules"

Defining Shifts Associated With a Workday

Access the Workday page.



Workday page

Effective Date

Enter an effective date for this workday. If you modify a previously-saved workday, there are limitations on the effective date you can choose:

- You cannot change the effective date 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 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 verifies whether that workday is used in any schedule calendars. If it is, then the schedule calendar needs refreshing. Use the Viewing Schedule Calendars to learn if the changes affect an existing schedule calendar.

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 once in the same workday.

If you change this field during Add mode and shift IDs are entered, you receive a warning that shift IDs will be deleted if the **Workday Type** field is changed. Shift ID detail is deleted for all effective-dated rows, and the **Workday Type** field is 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, it cannot be changed to another type.

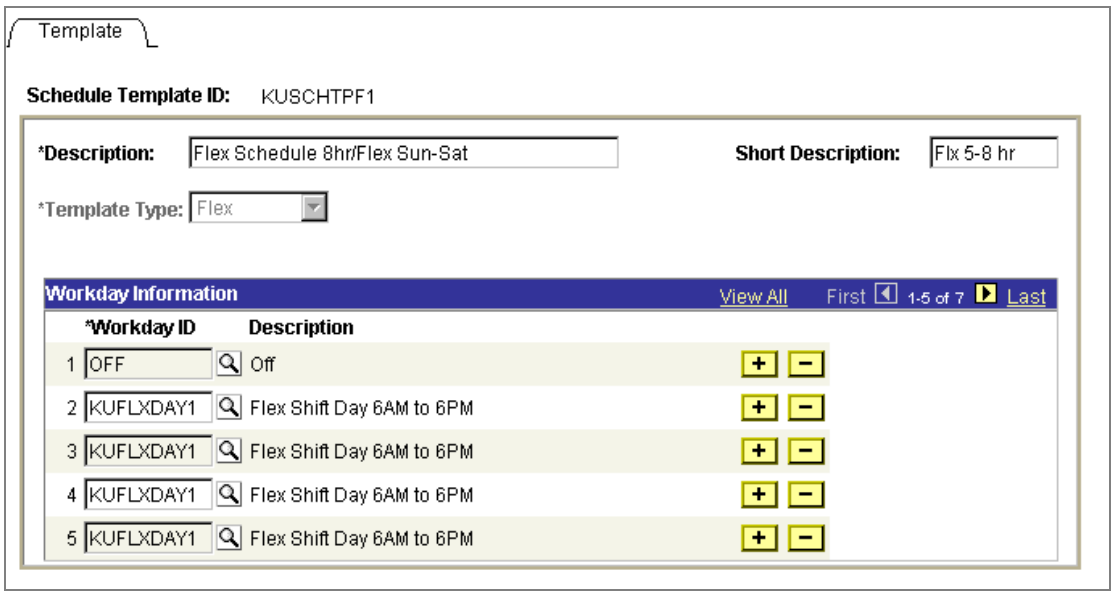
End Time This field displays the end time of the last shift for a punch or flex-type workday. If the workday consists of an elapsed shift, this field is cleared.

Shift Information

This grid displays the shifts that comprise this workday. There must be at least one line of shift ID detail for the system to save the workday.

Defining a Schedule Template

Access the Template page.



Template page

A template cannot be modified if it is used in any schedule calendars that need refreshing.

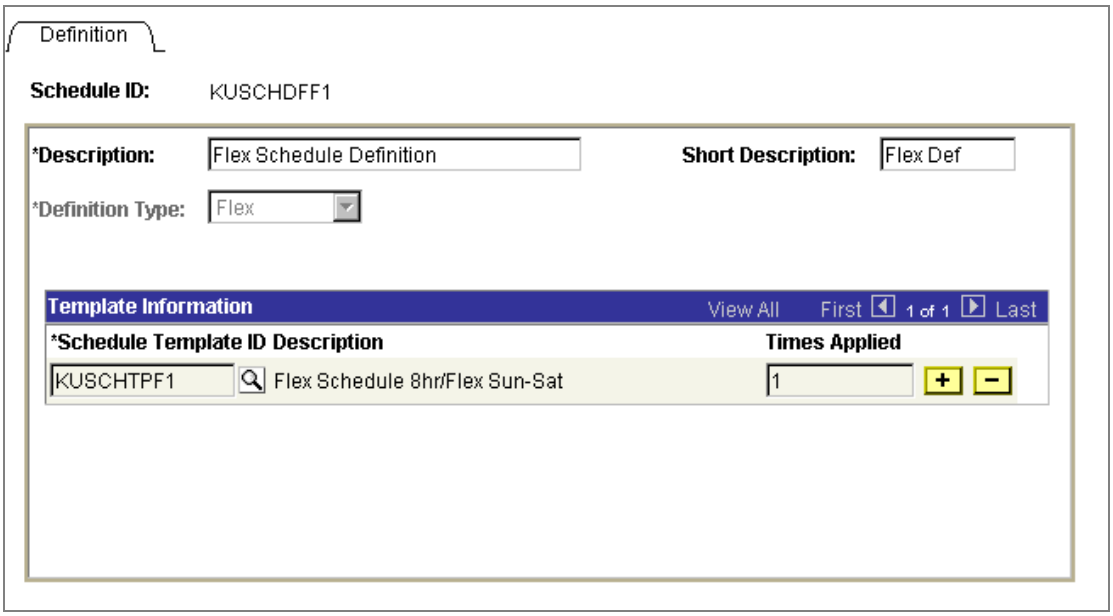
Template Type Select whether this schedule template will be an elapsed, flex, or punch template. Workdays in the template must be of the same type.

If you change the value in this field during Add mode, and the workday IDs are entered, you receive a warning that workday IDs will be deleted if the type field is changed.

When a template is saved as a particular type of template, it cannot be changed to another type.

Identifying Schedule Templates That Will Become a Schedule

Access the Definition page.



Definition page

The definition cannot be modified if it is associated with any schedule calendars that need refreshing.

Definition Type Select whether this will be an elapsed, flex, or punch schedule definition. You cannot combine different template types in the same definition.

If this field is changed during Add mode, and schedule template IDs are entered, you receive a warning that schedule template IDs will be deleted if the type field is changed.

When a schedule definition is saved as a particular type, it cannot be changed to another type.

Schedule Template ID Enter the schedule templates 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** field value for that template changes to ***1.***

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 value can be left at ***1.***

Building Schedule Calendars

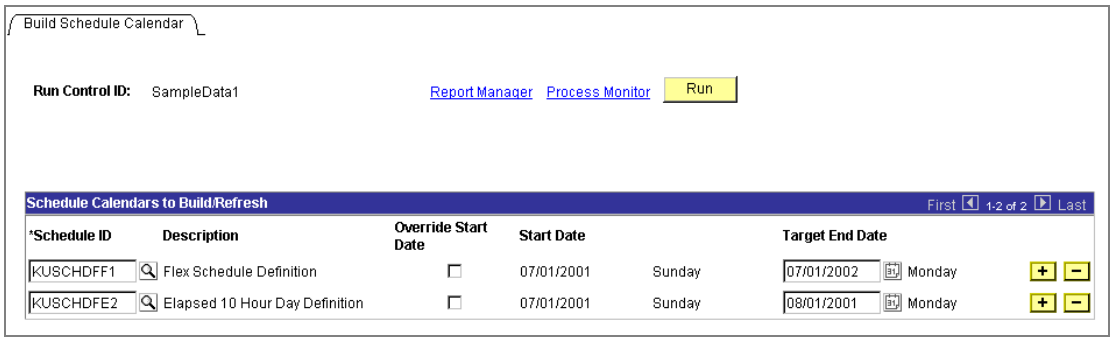
Define the work schedule components that the system will use to build schedule calendars.

Page Used to Build Schedule Calendars

Page Name	Object Name	Navigation	Usage
Build Schedule Calendar	SCH_RUNCTRL	Define Business Rules, Define Time and Labor, Process, Build Schedule Calendar	To tell the system to process work schedule components and build schedule calendars.

Building Schedule Calendars

Access the Build Schedule Calendar page.



Build Schedule Calendar page

Schedule ID

Enter the schedule IDs to add to this run control ID. A schedule ID cannot appear more than once on the page.

If the schedule calendar for the schedule ID needs refreshing (meaning that a shift or workday in the schedule calendar has changed), then all fields on the run control are automatically populated as necessary by the system and become unavailable—except for **Target End Date.**

When a schedule calendar needs refreshing, the start date is 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 of the existing calendar.

All shifts and workdays in the schedule IDs must have an effective date equal to or greater than the start date for their respective schedule IDs.

Start Date The date that the system builds the schedule calendar. The start date must correspond to the order in which you defined the templates and placed them on your schedule definition. For example, if the first 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.

Target End Date The minimum date to which the schedule calendar is built. Because the schedule definition has to be completed, the schedule calendar may extend beyond the target end date. For example, a schedule definition contains a seven-day template. December 31, 2001 is the target end date. If 31 December 2001 is day five of your template, the schedule calendar is built until 2 January 2002 to complete the last two days of the template.

Viewing Schedule Calendars

This task comprises two steps:

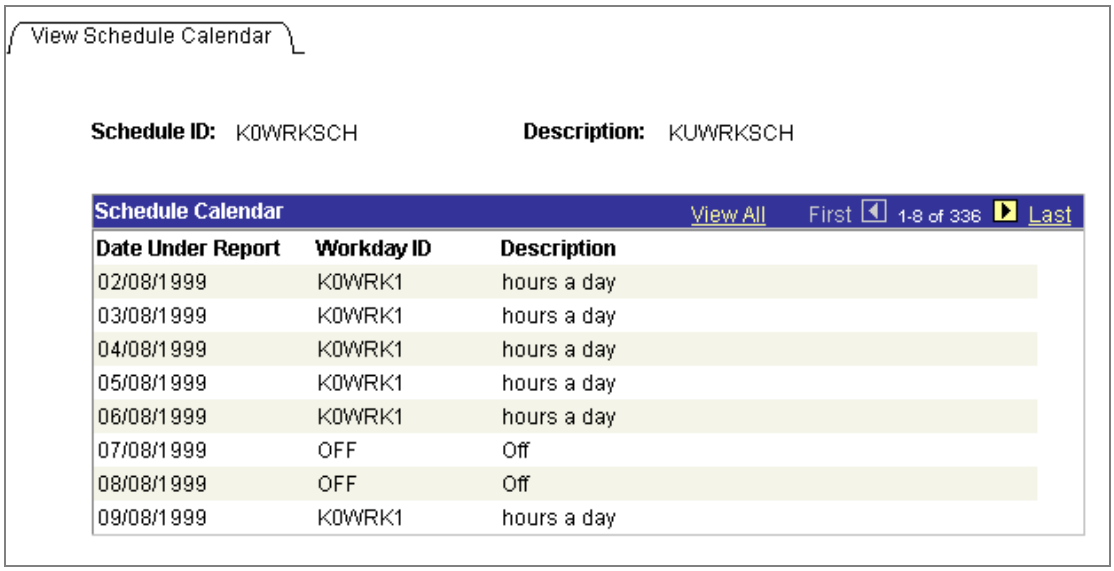
1. Viewing a schedule calendar and the dates for which it was built.
2. Viewing schedule calendars to refresh.

Pages Used to View Schedule Calendars

Page Name	*Object Name*	*Navigation*	*Usage*
View Schedule Calendar	SCH_CLND	Define Business Rules, Define Time and Labor, Inquire, View Schedule Calendar	To view schedule calendars.
View Schedule Refresh	SCH_CLND_REFRESH	Define Business Rules, Define Time and Labor, Inquire, View Schedules to be Refreshed	To view schedule calendars to be refreshed because a change was made to a shift or workday that the schedule calendar uses.

Viewing a Schedule Calendar

Access the View Schedule Calendar page.

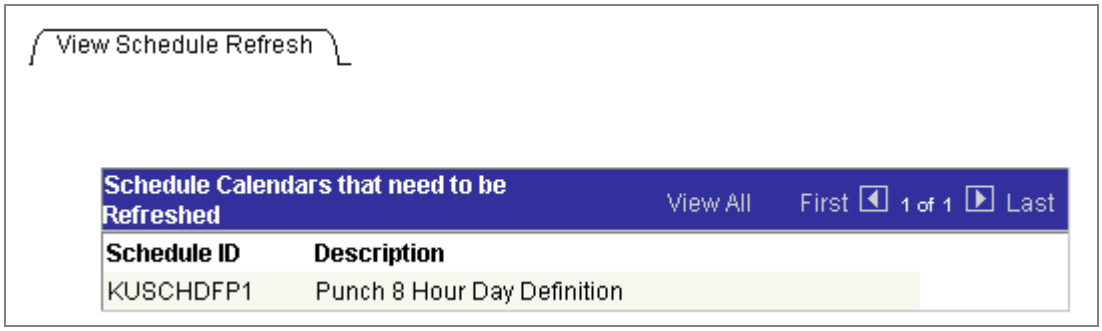


View Schedule Calendar page

The system displays the schedule calendar and the dates for which it was built. Specifically, it shows the workday associated to each day of the schedule.

Viewing Schedule Calendars to Refresh

Access the View Schedule Refresh page.



View Schedule Refresh page

This page contains a list of schedule calendars that need refreshing because a shift or workday that they use has been modified. The system displays a schedule ID and description for each schedule that needs refreshing.

Importing Third-Party Schedules

PeopleSoft Time and Labor has the ability to accept schedules 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. Process these

schedules in Time Administration by setting 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 system recognizes the data as an import. This ensures the correct precedence processing. Imported schedule information takes precedence over schedule calendar information and online workday override information. Remember that when you import schedule information, you cannot make online workday overrides on the dates for which you import information.

CHAPTER 8

Establishing Static and Dynamic Groups

This chapter provides an overview of groups and group security and discusses how to:

- Set group creation security.
- Create and update static groups.
- Create and update dynamic groups.

Understanding Static and Dynamic Groups

Several online and batch processing functions in PeopleSoft Time and Labor use groups of time reporters who meet selection criteria that you define. Groups can be static or dynamic:

Static group	Comprises users who meet the selection criteria defined on the Selection Criteria page. Membership does not change unless you add or remove members or change the selection criteria.
Dynamic group	The system updates membership automatically when you run a batch process or use the system's refresh feature. The process uses the date that the program runs to determine which time reporters satisfy the group selection criteria.

Time reporters can belong to several groups simultaneously, depending on your reporting needs. For example, a time reporter may belong to a group of people on the fourth floor and to a group of managers.

Use the refresh feature to update group membership—automatically removing time reporters who don't meet the selection criteria and adding those who do. This enables many online processes to use these groups.

Understanding Group Security

PeopleSoft Time and Labor provides two security features that protect sensitive time reporter data:

- Group Creation Security.

  Prevents 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.

  Defines 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.

Task Group Borrowing

When you create a static or dynamic group, you can choose a task group for group members. The system uses the selected task group when time is reported for group members on the Mass Time Reporting page. That is, the task group assigned to the group takes precedence over a task group assigned directly to a time reporter on 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
- Manage Exceptions by Group

The batch processes that use groups are:

- Time Administration
- Batch Approval

When generating a TimeCard report or Scheduled Hours report, you can select the groups to include.

Note. A basic knowledge of SQL is helpful when defining groups.

See Also

"Establishing Time and Labor Security"

"Setting Up Time Reporters," Updating Time Reporter Data

Group Creation Security

You can prevent users associated with particular row-security permission lists from creating dynamic and static groups that are based on sensitive data. Use the Group Creation Security page 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 accessible records.

Accessible Records

You can grant access to fields within the following six records:

JOB

EMPLOYMENT

PERSONAL_DATA

SCH_ASSIGN

TL_EMPL_DATA (available only when the Time and Labor option is selected on the Installation Table - Products page)

GP_PYGRP (available only when Global Payroll Core is selected on the Installation Table - Products page)

See Also

"Establishing Time and Labor Security"

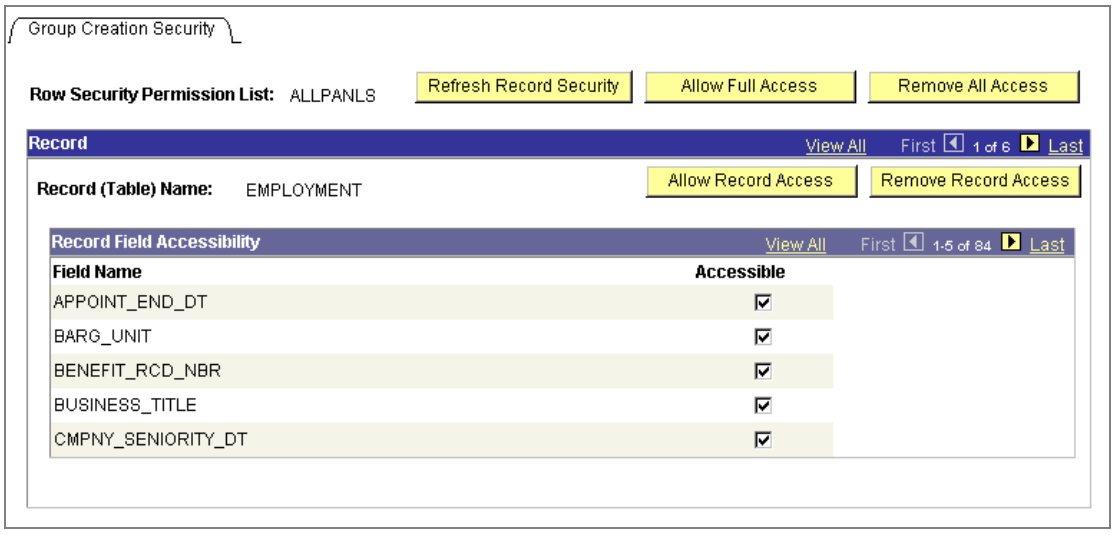
PeopleSoft Application Fundamentals PeopleBook, "Setting Up Your HRMS System," Selecting PeopleSoft Applications for Your Installation

Page Used to Set Group Creation Security

Page Name	Object Name	Navigation	Usage
Group Creation Security	TL_GRP_FLD_SEC	Define Business Rules, Define Time and Labor, Enroll, Group Creation Security	Prevent some row-security classes from creating groups that are based on sensitive data.

Setting Group Creation Security

Access the Group Creation Security page.



Group Creation Security page

Refresh Record Security

Click to retrieve all records and fields that you have authority to access. The system clears previously defined access instructions for the row-security permission list identified on this page.

This refresh feature is appropriate when:

- You've added fields to the selected six records and want to grant access to the new fields.
- You install PeopleSoft Global Payroll after using this page to define security.

  When you click the button, the system retrieves the GP_PYGRP record.

Warning: If you refresh record security after granting access to certain records and fields, the system clears all access definitions.

Allow Full Access Click 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 that users have authority to access, according to the assigned row-security permission list.

Remove All Access Click 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 with membership based on these records. The system clears all check boxes for all six records.

Record

Allow Record Access Click to allow access to all fields in the record that is currently displayed. The system automatically selects the **Accessible** check box to the right of each field name.

Remove Record Access Click to disallow access to all fields in the record that is currently displayed. The system automatically clears the **Accessible** check box to the right of each field name.

Record Field Accessibility

Accessible Indicates whether users have the ability to include the field within the selection criteria that they specify when creating groups.

Creating and Updating Static Groups

Creating and updating static groups comprises the following tasks:

1. Defining the criteria for selecting group members.

   You can also select a task group to be used for members during Mass Time Reporting.

2. Viewing a list of the time reporters in the group, removing group members, and adding comments.

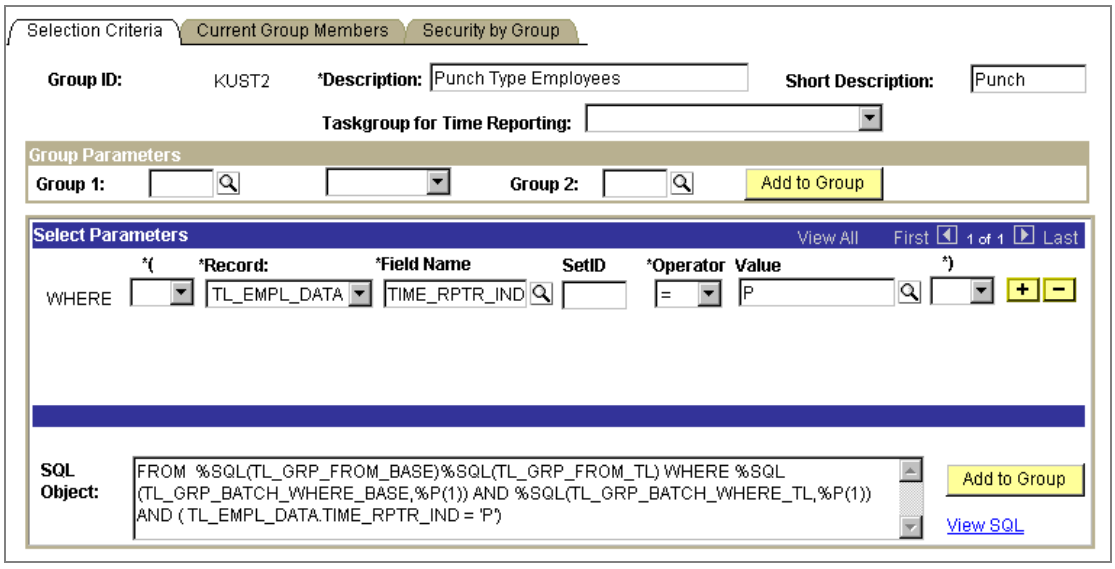
3. Giving users associated with selected row-security permission lists the authority to view and update time for members of the group.

Pages Used to Create and Update Static Groups

Page Name	Object Name	Navigation	Usage
Static Group - Selection Criteria	TL_GROUP_S1	Define Business Rules, Define Time and Labor, Enroll, Static Group	Specify the criteria for selecting group members.
Static Group - Current Group Members	TL_GROUP_S2	• Define Business Rules, Define Time and Labor, Enroll, Static Group, Current Group Members • Capture Time and Labor, Inquire, View Time Reporters in Group	View, update, and add comments to a list of the members of a static group.
Static Group - Security by Group	TL_GRP_SECURITY	Define Business Rules, Define Time and Labor, Enroll, Static Group, Security by Group	Specify which row-security permission lists can view and edit time reporting data for this group of time reporters.

Specifying Criteria for Static Group Members

Access the Static Group - Selection Criteria page



Static Group - Selection Criteria page

Taskgroup for Time Reporting

Select a task group for the system to apply when a user enters time for the members of this group through the Mass Time Reporting page. Use this feature when a group of time reporters is working on a temporary project or assignment.

The task group in this field takes precedence over the task group assigned to time reporters on the Maintain Time Reporter Data page.

Group Parameters

Complete the **Group Parameters** group box fields for a new group that you want to include:

- Members from an existing static group.
- Members from an existing static group plus members of another static group.
- Members from an existing static group minus members of another static group.

Group 1

Select the name of the group to include its membership in the new group.

In the field to the right, indicate whether to include or exclude members of a second group:

Select ***Minus*** to exclude all members of the group in the Group 2 field.

Select ***Plus*** to include all members of the group 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 for which to include or exclude membership.

Add to Group

Click 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 this 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 uses the criteria to generate the WHERE clause of a SQL select statement, which can contain up to 254 characters.

Complete the **Group 1** or **Group 2** field for the system to include all time reporters who fit the group parameters and all time reporters who meet the criteria defined 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. Select up to five open brackets: ***(((((.***

Record

Select a record name. Only records with access given on the Group Creating 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 on the Group Creation Security page are 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.

SAL_ADMIN_PLAN
GRADE
STEP
SALARY_MATRIX_CD
DEPTID
JOBCODE
LOCATION

Operator

To perform a mathematical operation, select the appropriate symbol. Valid entries are: **<, <=, <>, =, >, >=,** and ***LIKE.*** If you select ***LIKE,*** you can enter a partial value in the **Value** field. For example, ***S.***

Value

Select a value for the field name.

If you selected ***LIKE*** as the operator, do not enter quotation marks or the percent sign in the **Value** field.

This field is case-sensitive. Enter the value exactly as it is defined in the database.

If entering a date, be sure to enter the proper date format for your environment.

***)**

Select the closing bracket type.

(unlabeled)

If you want to add another parameter to your selection criteria (the WHERE clause), select ***AND*** or ***OR.***

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 meta-SQL in the **SQL Object** field.

View SQL

Click to view the SQL code generated by the WHERE clause.

Prompts With Dependencies

In some cases, the **Value** field does not provide a list of valid values to choose from. This is because the selected field name, 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 expected results if the value is not unique.

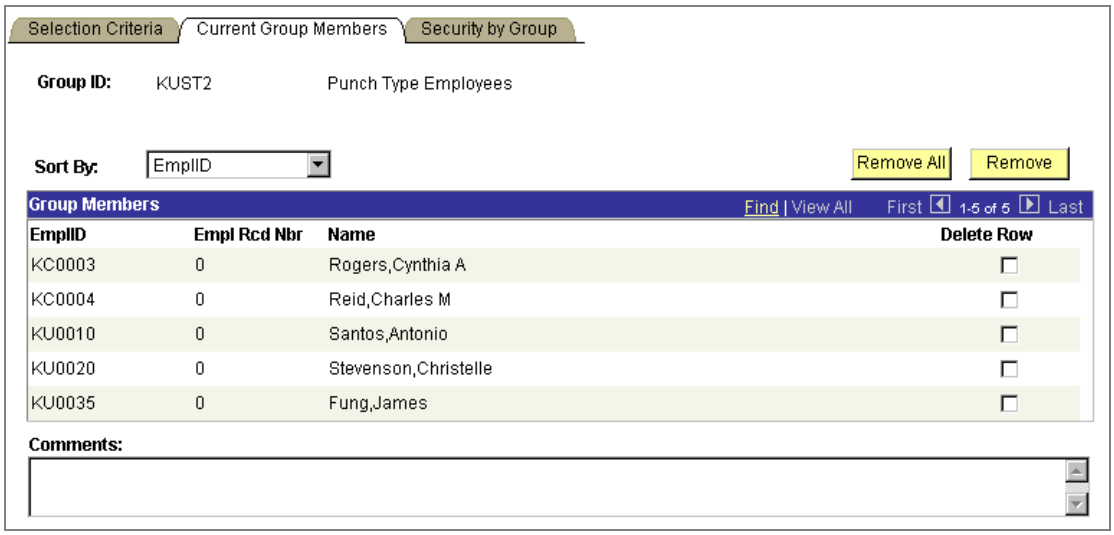
Record	*Field Name*	*Table*	*Dependencies*
EMPLOYMENT	TIME_RPT_LOC	TIMERPT_LOC_TBL	COMPANY
JOB	ACTION_REASON	ACTN_REASON_TBL	ACTION
JOB	CONTRACT_NUM	CNT_ACTIVE_VW	EMPL_ID
JOB	HOLIDAY_SCHEDULE	HOLIDAY_VW	REG_REGION
JOB	PAYGROUP	PAYGROUP_TBL	COMPANY
JOB	EMPL_TYPE	PAYGRP_EMPLTYPE	COMPANY, EMPL_TYPE, PAYGROUP
JOB	GRADE	SAL_GRADE_TBL	SAL_ADMIN_PLAN, SETID
JOB	STEP	SAL_STEP_TBL	GRADE, SAL_ADMIN_PLAN, SETID
JOB	REG_REGION	REG_STANDARD_VW	OPRCLASS
JOB	REVIEW_RATING	REVW_RATING_TBL	RATING_MODEL
PERSONAL_DATA	BIRTHSTATE	BIRTHSTATE_VW	BIRTHCOUNTRY
TL_EMPL_DATA	TASK_PROFILE_ID	TL_TASKGRP_PRFL	TASKGROUP

See Also

"Defining Task Reporting Requirements"

Viewing and Updating Static Group Members

Access the Static Group - Current Group Members page.



Static Group - Current Group Members page

Sort By Select ***EmplID*** (employee ID) to sort members by employee ID or select ***Name*** to sort members alphabetically by last name.

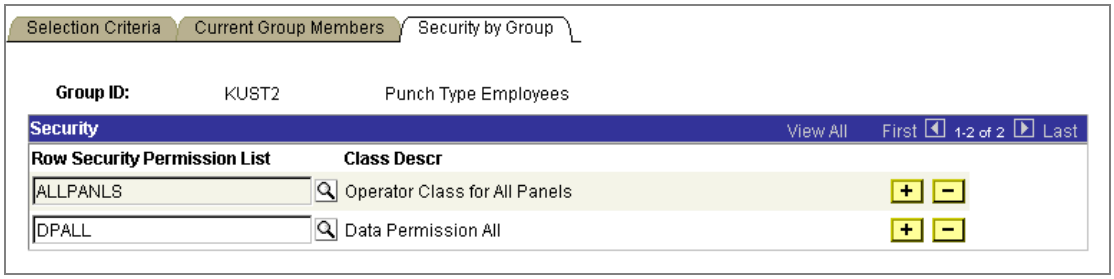
Delete Row To remove a member from the group, select the **Delete Row** checkbox to the right of the member's name.

Remove All Click to remove all time reporters from the group.

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 this button.

Setting Up Static Group Security

Access the Static Group - Security by Group page.



Static Group - Security by Group page

Note. You use the same Security by Group page to define security access to a static group and a dynamic group.

Row Security Permission List	Select the row-security permission list 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 that you selected appears.

Creating and Updating Dynamic Groups

Creating and updating dynamic groups comprises the following tasks:

1. Defining the criteria for selecting group members.

   You can also select a task group to be used for members during Mass Time Reporting.

2. Previewing the list of time reporters included in the group (should you refresh the group or run the Time Administration process).

3. Giving users associated with selected row-security permission lists the authority to view and update time for group members.

4. Viewing the list of time reporters in the group after the refresh process.

5. Updating dynamic group membership.

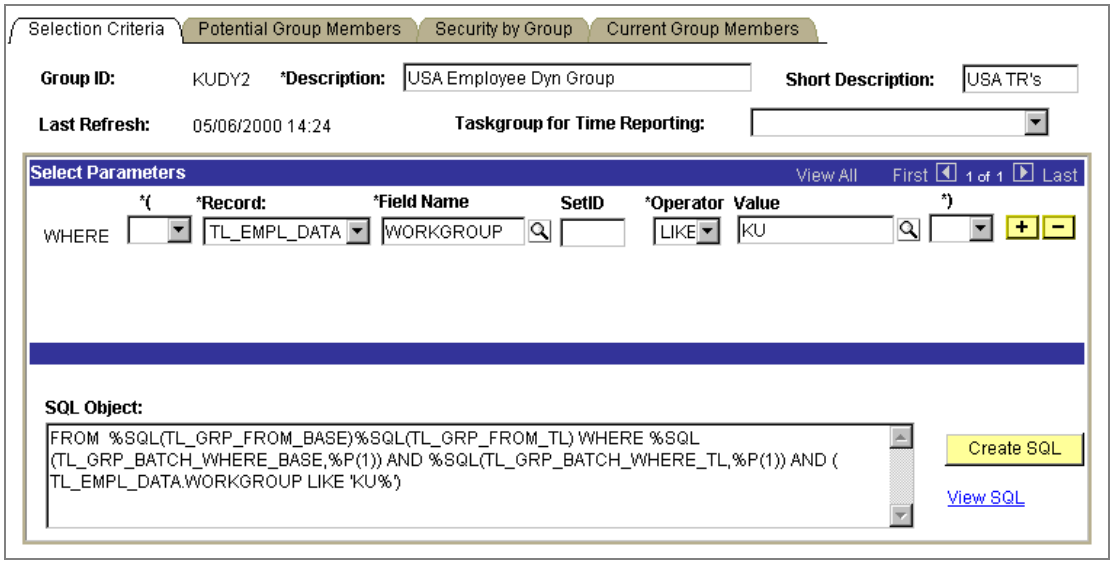
Pages Used to Create and Update Dynamic Groups

Page Name	*Object Name*	*Navigation*	*Usage*
Dynamic Group - Selection Criteria	TL_GROUP_D1	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group	Define the criteria to select members of the group.
Dynamic Group - Potential Group Members	TL_GROUP_D2	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group	Preview the list of time reporters who currently meet the selection criteria for a dynamic group. Also, ensure that you've defined the correct selection criteria.
Dynamic Group - Security by Group	TL_GRP_SECURITY	Define Business Rules, Define Time and Labor, Enroll, Dynamic Group, Security by Group	Specify which row-security permission lists can view and edit time reporting data for this group of time reporters.

Page Name	Object Name	Navigation	Usage
Dynamic Group - Current Group Members	TL_RUN_GRP_REFRESH	• Define Business Rules, Define Time and Labor, Enroll, Dynamic Group • Administer Workforce, Capture Time and Labor, Inquire, View Time Reporters in Group	View the current members of a dynamic group. Refresh group membership.
Refresh Dynamic Groups	TL_GROUP_LIST	Define Business Rules, Define Time and Labor, Process, Refresh Dynamic Group(s)	Refresh membership in multiple dynamic groups at once.

Specifying Criteria for Dynamic Group Members

Access the Dynamic Group - Selection Criteria page.



Dynamic Group - Selection Criteria page

Taskgroup for Time Reporting

Select a task group for the system to apply when a user enters time for the members of this group on the Mass Time Reporting page. Use this feature when a group of time reporters is working on a temporary project or assignment.

The task group in this field takes precedence over the task group assigned to time reporters on the Maintain Time Reporter Data page.

Select Parameters

Use the fields in the **Select Parameters** grid to define the selection criteria for adding members to the group. For example, add only those people who work in a particular location or job. The system uses the criteria 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. Select 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 to choose any field.

Field Name
Select a field name. Only fields with access given in the Group Creation Security pages are 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.

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 enter a partial value in the **Value** field. For example, ***S.***

Value
Select a value for the field name.

If you selected ***LIKE*** as the operator, do not enter quotation marks or the percent sign in the **Value** field.

This field is case-sensitive. Enter the value exactly as defined when added to the database.

If entering a date, be sure to enter the proper date format for your environment.

***)**
Select the closing bracket type.

(unlabeled)
If you want to add another parameter to your selection criteria (the WHERE clause), select ***AND*** or ***OR.***

Create SQL
Click the **Create SQL** button to update the SQL code that selects group members.

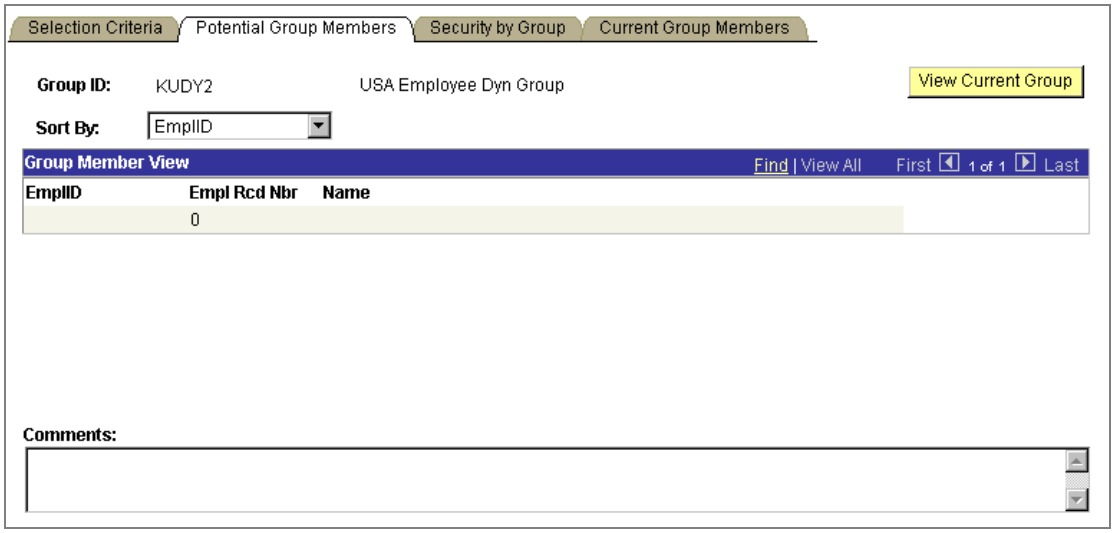
View SQL Click the **View SQL** link to access the View SQL page, where you can see the SQL code generated by the WHERE clause.

See Also

"Defining Task Reporting Requirements"

Previewing Dynamic Group Members

Access the Dynamic Group - Potential Group Members page.



Dynamic Group - Potential Group Members page

Sort By Select ***EmplID*** (employee ID) to sort time reporters by employee ID or select ***Name*** to sort alphabetically by last name.

View Current Group Click to view a list of all time reporters who currently meet the selection criteria.

When you're ready to create and save the group, use the Current Group Members page or the Selection Criteria page.

Setting Up Dynamic Group Security

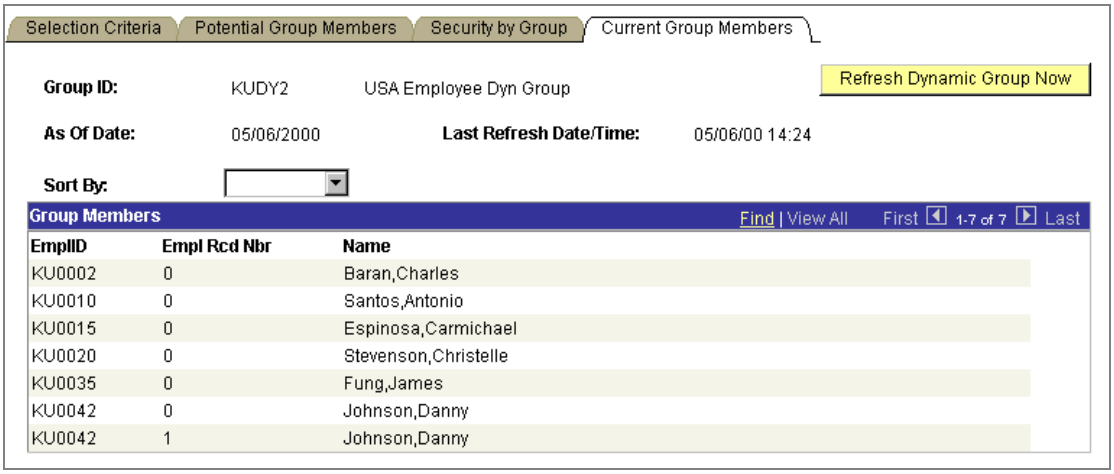
The Static Group - Security by Group page for dynamic groups is the same as the page for static groups.

See Also

Setting Up Static Group Security

Viewing Dynamic Group Members

Access the Dynamic Group - Current Group Members page.



Dynamic Group - Current Group Members page

The refresh feature enables you to update membership in a dynamic group. When you start the process, the system removes time reporters who don't fit the group selection criteria and adds time reporters who do. Use the Refresh Dynamic Group feature before accessing any online page on which you access time reporters. This ensures an up-to-date group member list when the page is displayed. It's not necessary to refresh dynamic groups before batch processing. PeopleSoft Time and Labor automatically refreshes group membership before processing time.

As Of Date — If you entered an as of date on the Refresh Dynamic Groups page when you last refreshed this group, that date appears here.

Sort By — Select ***EmplID*** (employee ID) to sort group members by employee ID or select ***Name*** to sort members alphabetically by last name.

Refresh Dynamic Group Now — Click to refresh immediately. The system refreshes and displays the dynamic group membership.

Updating Dynamic Group Membership

Access the Refresh Dynamic Groups page.



Refresh Dynamic Groups page

The refresh process uses today's date or a specified *as of* date to determine which time reporters meet the group selection criteria.

Use Current Date Select for the system to retrieve all time reporters who meet the selection criteria today.

As of Date The **As of Date** field appears only if you clear the **Use Current Date** check box. Enter the date for which you want the group refreshed.

Enter a previous date to refresh the population of a group or groups for a prior date.

CHAPTER 9

Setting Up Time Reporters

This chapter provides an overview of time reporters and discusses how to:

- Enroll time reporters.
- Maintain time reporter data.
- Assign and view compensatory time plans.
- Assign schedules.

Understanding Time Reporter Data

Employees and nonemployees do not automatically participate in the PeopleSoft Time and Labor system when added to the PeopleSoft Human Resources database. You must enroll, as a time reporter, each person for whom time will be reported or created. When enrolling a time reporter, specify how the person will report time and how the system will process that time. You must assign the following:

- A task group that identifies:
  - The default time reporting templates.
  - The task template.
  - The task profiles for time reporting.
- A workgroup that defines:
  - The type of reporting (exception or positive).
  - The rule program.
  - The time reporting code (TRC) program.
  - The default time period.
  - Schedules.
  - Rounding rules.

- Day-breaker options.
- The compensatory time plan assigned to the time reporter.

In addition, you can:

- Assign a time collection device (TCD) group that identifies the TCDs that the time reporter can use.
- Assign a restriction profile ID that identifies which TCD punches are acceptable.
- Select a time reporter's time zone if it is different from the base time zone.
- Enter up to five rule elements to associate with the time reporter.
- Select a specific task profile, time reporting templates, and time period ID that take precedence over those associated with the time reporter's default task group and workgroup.

Note. A time reporter is any employee or nonemployee whose time is reported or generated through PeopleSoft Time and Labor

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Referential Integrity

When you change one area of PeopleSoft Time and Labor, the Referential Integrity feature verifies that 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.

Preventing Inactivation or Deletion of Effective-Dated Rows

The system disallows the inactivation or deletion of effective-dated rows on the Maintain Time Reporter Data page under the following conditions:

- If time has been reported for a date that is the same or after the effective date, you cannot inactivate an effective-dated row.

  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 on the TL Installation page is cleared.

  You cannot delete an effective-dated row that invalidates a compensatory time plan association on the Comp Plan Enrollment page. You must inactivate the compensatory time off 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

On the Create/Maintain Time Reporter Data page, you cannot change the minimum effective date to a date less than the minimum effective date of the following fields:

- 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 following prompt tables to be greater than the effective date of the Create/Maintain TR Data target table:

- Workgroup
- TCD Group
- Taskgroup
- Rule Element 1
- Rule Element 2
- Rule Element 3
- Rule Element 4
- Rule Element 5

Compensation Plans

There are two ways to enroll time reporters into the compensatory time plans in PeopleSoft Time and Labor. You choose a method on the TL Installation page:

- Select the Default from Workgroup check box.

  PeopleSoft Time and Labor assigns time reporters to the compensatory time plan linked to their workgroup. The compensatory time plan and its status appear on the Comp Plan Enrollment page; however, you cannot make changes on this page. If you change the compensatory 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 compensatory time plan assignment, the system updates the Comp Plan Enrollment page.

- Clear the Default from Workgroup check box on the TL Installation page and assign a time reporter directly to one or more compensatory time plans using the Comp Plan Enrollment page.

  View active and inactive compensatory time plans for a time reporter on the View Comp Plans pages.

Note. Enrollment records are not affected if you clear the Default from Workgroup check box after compensatory time plans are assigned to time reporters. However, you will gain the ability to edit the Comp Plan Enrollment page.

See Also

"Setting Up Basic Tables," CompensatoryTime Plans

"Establishing Workgroups"

Schedules

All time reporters have a schedule assignment that is either the workgroup default schedule or a custom schedule. When a person is hired, they use the workgroup default schedule.

For a time reporter to have a custom schedule assignment, there are two ways to change the assignment:

- Assign a custom schedule on the Assign Schedules page.

  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.

- Use the Group Schedule Assignment process.

  You can assign a schedule to multiple time reporters simultaneously, to a static or dynamic group, or to selection of individual time reporters (solely for the purpose of assigning the same schedule.) After running the Group Schedule Assignment process, view the time reporters' new schedule assignment using the Assign Schedules page.

When you assign a schedule to a time reporter, the system deletes workday overrides that:

- Are of different types than the schedule assignment (for example, elapsed instead of punch).

- Have a date greater than or equal to the new assignment.

This is to retain the data integrity of the work schedule.

New schedule assignments trigger the Referential Integrity process. Reported or payable time with a date greater than or equal to the date of the new assignment is reevaluated by Time Administration. This is to make corrections where necessary:

- Due to payable time being created from scheduled time.
- Where rules are run against scheduled time.

Time reporters with multiple jobs can have a schedule assignment for each job. However, check the assignments to verify that you are not scheduling the time reporter to concurrent hours. The system does not check for overlapping hours from multiple schedule assignments.

To assign a schedule to a group of time reporters, most of whom are in a static or dynamic group, select that group ID and then selectively exclude 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. If the group of time reporters sharing the schedule assignment have nothing in common, select them individually by employee ID.

Note. To assign schedules, the Workforce_Sync Message must be active on the PERSON_DATA message channel, which is delivered with PeopleSoft Application Messaging. This message inserts a row into the SCH_ASSIGN record when an employee is hired.

See Also

"Defining Work Schedules"

PeopleTools PeopleBook: Integration Tools

Entering and Maintaining Time Reporter Data

Entering and maintaining time reporter data comprises the following tasks:

1. Enrolling time reporters into the system.
2. Viewing badge details.
3. Updating time reporter data.
4. Viewing a group membership list.

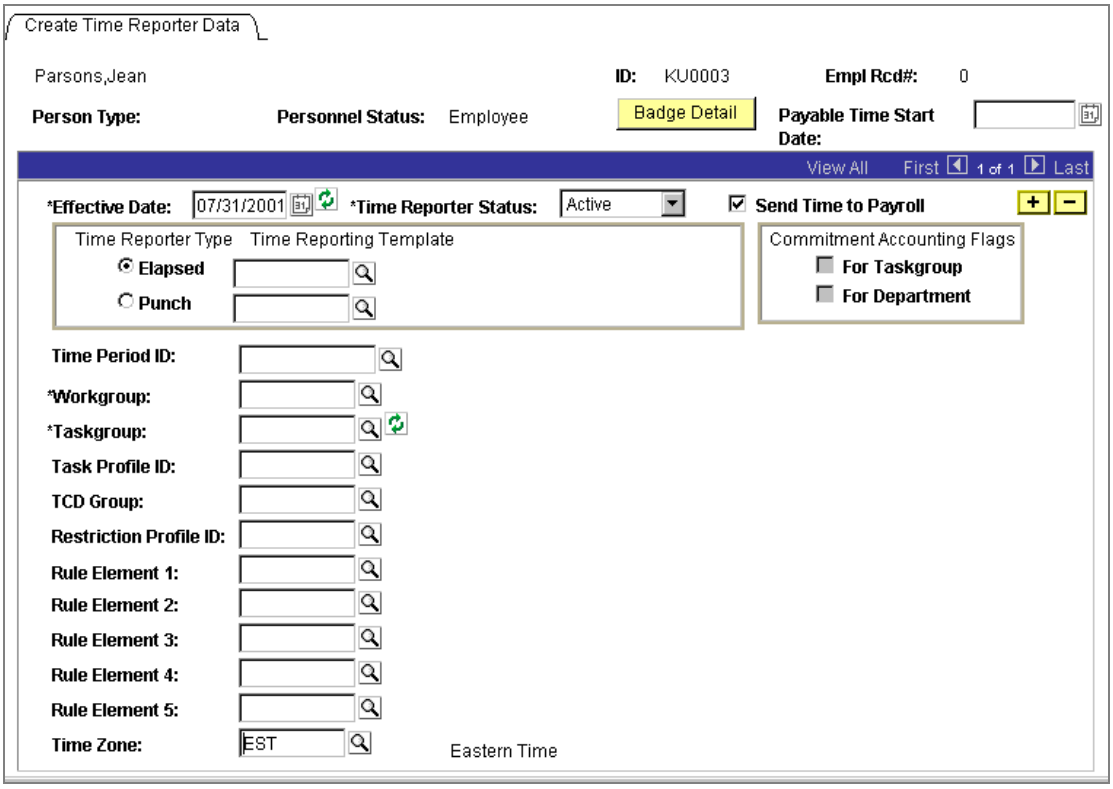
Pages Used to Enter and Maintain Time Reporter Data

Page Name	*Object Name*	*Navigation*	*Usage*
Create Time Reporter Data	TL_EMPL_DATA1	• Define Business Rules, Define Time and Labor, Enroll, Create Time Reporter Data • Click the Time Reporter Data link on various pages accessible on the Administer Workforce menu in PeopleSoft Human Resources.	To enroll a time reporter into the PeopleSoft Time and Labor system.
Badge Detail	TL_BADGE_SEC	Define Business Rules, Define Time and Labor, Enroll, Create Time Reporter Data	To display badge information for a time reporter.
Maintain Time Reporter Data	TL_EMPL_DATA1	• Define Business Rules, Define Time and Labor, Enroll, Maintain Time Reporter Data • Click the Time Reporter Data link on various pages accessible on the Administer Workforce menu in PeopleSoft Human Resources.	To update enrollment information for time reporters in PeopleSoft Time and Labor.
Group Membership	TL_GRP_MEMBERSHIP	Define Business Rules, Define Time and Labor, Enroll, Maintain Time Reporter Data	To view the list of groups that the time reporter is assigned to.

Note. The Time Reporter Data link appears on pages in the PeopleSoft Human Resources Workforce menu only if you've selected Time and Labor on the General Installation Table.

Enrolling Time Reporters

Access the Create Time Reporter Data page.



Create Time Reporter Data page

Note. Use the Maintain Time Reporter Data page to make changes to data entered on the Create Time Reporter Data page.

	Click for the system to refresh the fields in the Commitment Accounting Flags group box.
Badge Detail	Click to access the Badge Detail page and 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 time reporters. Badge information is important for punch time reporters, who need this information to report time to the TCD.
Payable Time Start Date	Enter the date for the system to start creating payable time for the time reporter. This date is 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 that 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, the process creates payable time as of the PeopleSoft Time and Labor enrollment date (the first effective date for the time reporter).

The payable start date cannot be earlier than the date that the time reporter is enrolled in PeopleSoft Time and Labor.

Note. The **Payable Start Date** field does not appear on the Maintain Time Reporter Data page because it is 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 field.

Effective Date The effective date must be the same as or after the hire date or, for nonemployees, the add date.

Time Reporting Status When you enroll a time reporter, the time reporting status is ***Active*** by default. Time can be reported and generated for the time reporter.

Send Time to Payroll Select this check box to integrate PeopleSoft Time and Labor with, and send this time reporter's payable time to, a payroll system.

If this check box is cleared, the Time Administration process converts the reported time to payable time and sets the time reporter's payable time status to *Needs Approval*. When the payable time is approved, the status is updated to *Closed*.

Time Reporter Type

Time reporter type identifies how the time reporter will enter 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 if your time reporter will be reporting time in hours or partial hours.

Punch Select if your time reporter will be reporting start and stop times in precise entries 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 cleared, the system uses the time reporting templates assigned to the time reporter's task group.

Elapsed — Select the elapsed time reporting template to use for this time reporter, if different from the one assigned to the time reporter's task group.

Punch — Select the punch time reporting template to use for this time reporter, if different from the one assigned to the time reporter's task group.

Commitment Accounting Flags

These check boxes are display-only and are applicable when you integrate PeopleSoft's commitment accounting functionality with task reporting.

For Taskgroup — Selected automatically if the task group for the time reporter (in the **Taskgroup** field) is defined for commitment accounting.

For Department — Selected automatically if the time reporter's department is defined for commitment accounting in People Soft Human Resources. When the **For Department** check box is selected, assign the task reporter a task group that is also defined for commitment accounting.

Both flags must be selected or cleared before you can save the Create Time Reporter Data page.

Note. If you change the effective date or the task group on this page, click the icon to the right of either field to refresh the commitment accounting flags.

Additional Elements

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.

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 that the system uses 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 is selected on the TL Installation page, the system updates compensatory time plan enrollment when there is a change in a compensatory time plan. The dormant compensatory time plan is inactivated and the new compensatory time plan becomes active as of the effective-dated change of the workgroup on the Maintain Time Reporter Data page.

Taskgroup

A required field. It identifies the default task template, task profile, and time reporting templates that the system uses 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 task group that's defined for commitment accounting. When you do so, the system selects the **For Taskgroup** check box.

Choose ***PSNONTASK*** if this time reporter will never be reporting task information. Choose PSNONCATSK for time reporters not reporting task information in a Commitment Accounting Department. (The system can still collect all the time reporting elements such as country, state, locality, badge ID, and time zone.)

Task Profile ID

Select a task profile ID for the system to use a different default task profile ID than that assigned to the time reporter's task group. Task profiles define the tasks to which a person's reported time is allocated automatically if task information is not reported.

TCD Group (time collection device group)

If the time reporter uses a TCD, such as a time clock or badge scanner to report time, select the appropriate TCD group. The TCD group identifies the TCDs that the time reporter is authorized to use.

Note. When you set up a TCD, you associate it with one or more task groups. Select one of the task groups that is associated with the TCD as the time reporter's default task group in the **Taskgroup** field. If your default task group is not associated with a TCD in your TCD group, you receive a warning message when saving the page. In addition, all reported task information is associated with a borrowed task group.

Restriction Profile ID This field applies only if the time reporter uses a time clock device to report time. A restriction profile identifies when to allow or disallow punches in conjunction with the time reporter's schedule.

Select a restriction profile ID in this field to apply a different restriction profile than that assigned to the time reporter's TCD group.

Rule Elements 1-5 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 rules to a specific population of time reporters.

Time Zone Select the time zone in which the time reporter enters time.

This system autopopulates the field with the base time zone defined with PeopleTools Utilities.

See Also

"Defining Task Reporting Requirements," Creating Task Profiles

"Setting Up Basic Tables," Time Zone Offsets Tables

"Creating Rules in Time Administration," Defining Rule Elements

"Setting Up Basic Tables," General Rules for Building Periods and Calendars

"Establishing Workgroups"

"Reporting Time"

"Understanding Payable Time"

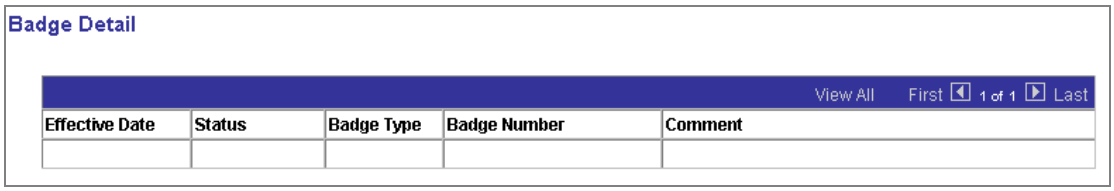
"Understanding Batch Processing in Time Administration," Understanding Time Reporter Status

"Using Time Collection Devices (TCDs)"

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting

Viewing Badge Details

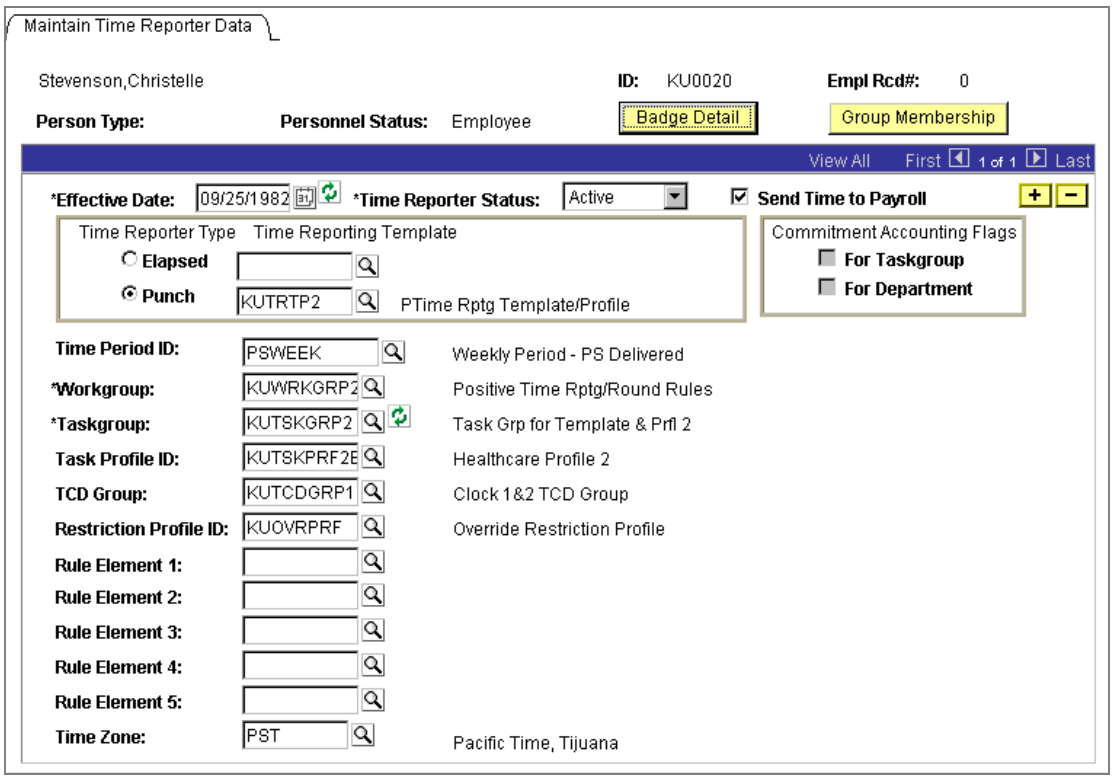
Access the Badge Detail page.



Badge Detail page

Updating Time Reporter Data

Access the Maintain Time Reporter Data page.



Maintain Time Reporter Data page

Group Membership Click 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 identical to those on the Create Time Reporter Data page. Descriptions are provided for changes to elements that trigger referential integrity and that affect the system generally.

Changes That Affect the System

Time Reporter Status	If you change a time reporter's status to ***Inactive,*** time cannot 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. If a time reporter is terminated, update the employee status through PeopleSoft Human Resources and then process any reported time for which the time reporter has not been paid. After the time is processed, 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 check box after payable time has been created for this time reporter may impact the payable time. See "Impact of Changing the Send Time to Payroll Check Box" 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.** 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 biweekly rules associated with a time reporter to produce unpredictable results.
Taskgroup	If you change the task group value assigned to the time reporter, the next time you run the Time Administration process, Referential Integrity validates that any task entities reported on or after the change date are associated with the new task group. **Note.** If you change the task group after you report and submit time (through the Rapid Time Reporting page, Mass Time pages, or TCD interface) during the period of the change, you must update the task group in the weekly reporting pages to reflect the change.
Task Profile ID	If you change the task profile ID assigned to the time reporter, the next time you run the Time Administration process, the system verifies that the task profile reported through the weekly elapsed time page is associated with the employee's default task group as of the date reported.
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.

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.

Changes That Trigger Referential Integrity

Updates to the **Workgroup, Taskgroup, Task Profile ID,** and **Rule Element** fields trigger a referential integrity check when you run the Time Administration process. Referential Integrity triggers the Time Validation process, which reevaluates reported or payable time that may be invalidated by a change in workgroup, task group or task profile ID. Exceptions are generated for invalid time.

Impact of Changing the Send Time to Payroll Check Box

Payable Status of Payable Time	*Impact of Selecting Send Time to Payroll Check Box*	*Impact of Clearing Send to Time Payroll Check Box*
Estimated – Ready for Payroll	Time remains in *Estimated – Ready for Payroll* status. It is not 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 – Goes to Payroll* to be picked up by a payroll system.
Approved – Goes to Payroll	The payable status is not set to *Closed* nor is the time published to PeopleSoft Projects. Use SQL to change the payable status and publish the time to Projects.	Not applicable.

Payable Status of Payable Time	Impact of Selecting Send Time to Payroll Check Box	Impact of Clearing Send to Time Payroll Check Box
Closed	Time remains in *Closed* status. If the time has been closed as a result of being paid but not labor-distributed, make desired adjustments within your payroll system. Make a record-only adjustment in PeopleSoft Time and Labor to keep the data in both applications synchronized.	The Time Administration process does not set the payable status to *Approved – Goes to Payroll,* therefore the time cannot be sent to a payroll system. Use SQL to change the status to *Approved – Goes to Payroll.* If you change the status to *Approved – Goes to Payroll,* 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 original estimated gross amount and the new amount, only the difference is published.
Rejected by Payroll	Time Administration does not set the payable status to *Closed;* therefore, another payroll system can retrieve the time. Use SQL to set the status to *Closed.*	Not applicable.
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 been issued and you need to make adjustments, enter adjustments through your payroll system. Be sure to make record-only adjustments in PeopleSoft Time and Labor to keep the date in both applications synchronized.	Not applicable.

See Also

Pages Used to Enter and Maintain Time Reporter Data

"Introduction to PeopleSoft Time and Labor," Time Administration and Referential Integrity

"Using Time Collection Devices," Sending Setup Data to a TCD

"Understanding Payable Time"

"Establishing Workgroups," Making Workgroup Transfers

Viewing a Group Membership List

Access the Group Membership page.



Group Membership page

Group Type The group type can be either ***Dynamic*** or ***Static.***

Dynamic groups comprise time reporters who met the group selection criteria at 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.

Static groups comprise 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.

See Also

"Establishing Static and Dynamic Groups"

Assigning and Viewing Compensatory Time Plans

Assigning and Viewing Compensatory Time Plans comprises the following tasks:

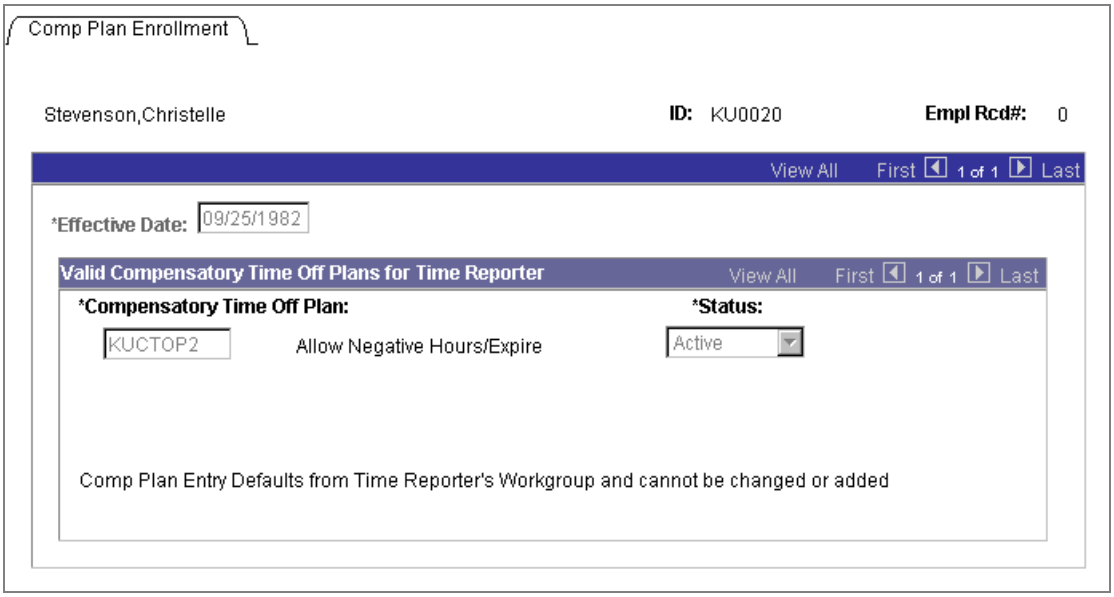
- Enrolling time reporters in a compensatory time plan.
- Viewing the compensatory time plan history for time reporters.

Pages Used to Assign and View Compensatory Time Plans

Page Name	*Object Name*	*Navigation*	*Usage*
Comp Plan Enrollment (compensatory plan enrollment)	TL_EMPL_COMP	Define Business Rules, Define Time and Labor, Enroll, Comp Plan Enrollment	• To enroll a time reporter in one or more compensatory time plans. • To view compensatory time plans that have the same effective date.
View Comp Plans	TL_TR_COMP_PLAN_VW	Define Business Rules, Define Time and Labor, Inquire, View Time Reporter Comp Plans	To view the history of compensatory time plan assignments for a specific time reporter.

Enrolling Time Reporters in a Compensatory Time Plan

Access the Comp Plan Enrollment page.



Comp Plan Enrollment page

Effective Date If the compensatory time plan was assigned to the time reporter's workgroup, the date that 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 compensatory time plan to assign to the time reporter. You can assign more than one compensatory time plan to a time reporter if the plans do not share any of the same compensatory time TRCs (TRCs that have the Effect on Comp/Leave option set to CT Earned or CT Taken.)

This field is unavailable if the Default from Workgroup check box is selected on TL Installation page. In this case, the following message appears at the bottom of the page: "Comp Plan Entry Defaults from Time Reporter's Workgroup and cannot be changed or added".

Status

Indicates if the time reporter is currently associated with the compensatory time plan. Valid values are ***Active*** and ***Inactive.***

The system changes the status to ***Inactive*** if the compensatory time plan associated with the task reporter's workgroup changes to inactive. The system 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 compensatory time plan for the time reporter.

Viewing Compensatory Time Plan History

Access the View Comp Plans page.

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

If a time reporter switches compensatory time plans, the change is represented by three rows of data:

- A row for the original plan, with a status of ***Active.***
- A row for the original plan, with a status of ***Inactive.***
- A row for the new plan, with a status of ***Active.***

Assigning Schedules

Assigning schedules comprises the following tasks:

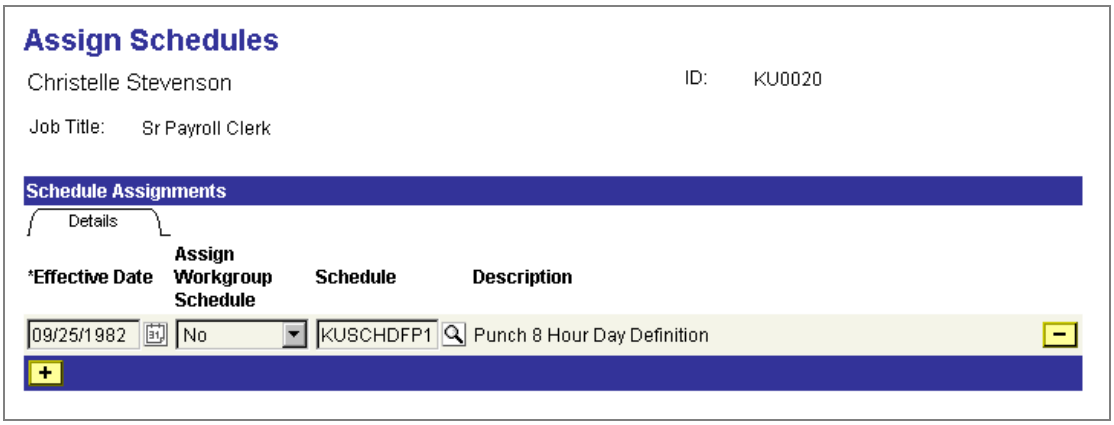
- Assigning a long-term schedule.
- Assigning a group schedule.

Pages Used to Assign Schedules

Page Name	*Object Name*	*Navigation*	*Usage*
Assign Schedules	SCH_ASSIGN	Define Business Rules, Define Time and Labor, Enroll, Assign Work Schedule	To assign a time reporter's long-term schedule.
Group Schedule Assignment	SCH_GRP_ASSIGN	Define Business Rules, Define Time and Labor, Process, Group Schedule Assignment	To assign a long-term schedule to a group of time reporters.

Assigning Long-Term Schedules

Access the Assign Schedules page.



Assign Schedules page

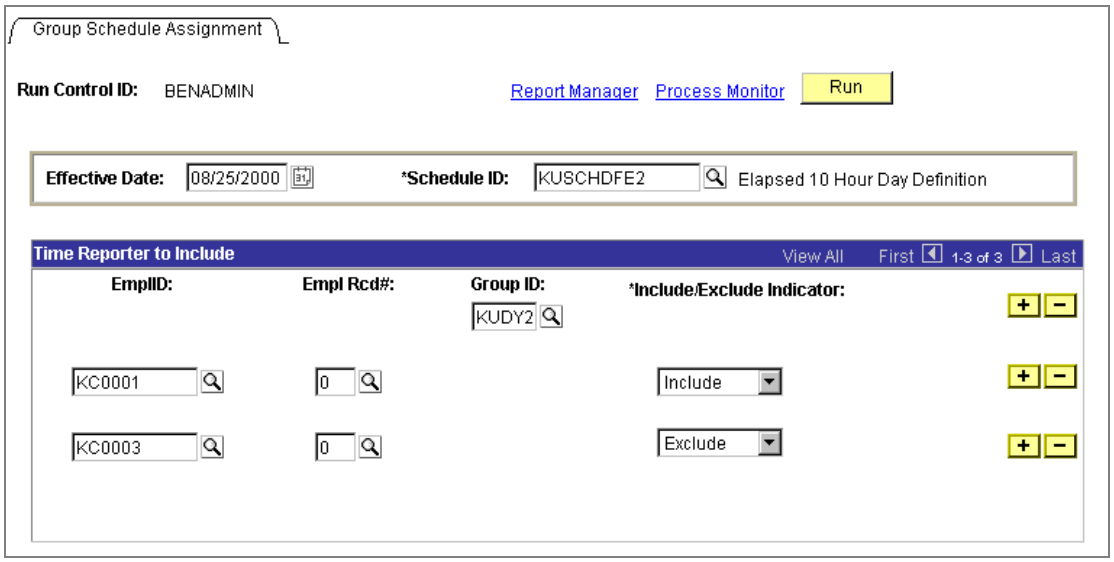
The system displays the time reporter's name, ID, and job title.

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,*** enter a schedule.

Assigning Group Schedules

Access the Group Schedule Assignment page.



Group Schedule Assignment page

Schedule ID Select the schedule that you are assigning. The system displays a description of the schedule.

EmplID (employee ID) Select the time reporter to include in or exclude from this group schedule assignment.

Empl Rcd# (employee record number) Select the appropriate value for this time reporter.

Group ID Select the group for which you would like to assign a schedule.

Include/Exclude Indicator Select whether to include or exclude the time reporter indicated in this row. If you create a row to exclude a time reporter and then enter a row with the group that includes that time reporter, the time reporter will be excluded from the group schedule assignment. The order in which you add rows does not affect the result.

CHAPTER 10

Establishing Time and Labor Security

This chapter provides an overview and discussion of row security permission lists.

Understanding Row Security Permission Lists

Permission lists, which are created with PeopleTools and assigned to user profiles, define user sign-on times, page access, PeopleTools access, and a variety of other authorizations. Row security permission lists define the set of data permissions for users who are associated with a particular permission list. You can define row security permission lists that enable users to:

- Enter or update time reported in a previous period.
- Use the system date if the system is not in production mode.
- View and enter data for time reporters who belong to specific static or dynamic groups.

  We refer to this feature as *group security*.

Group Versus Department Security

If you plan to use group security, you can create groups before or after you define the other data permissions for a 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.

When you open the Mass Time, TL Launch Pad, or any other page to enter or display time, the list of available time reporters depends on whether you are using group or department security.

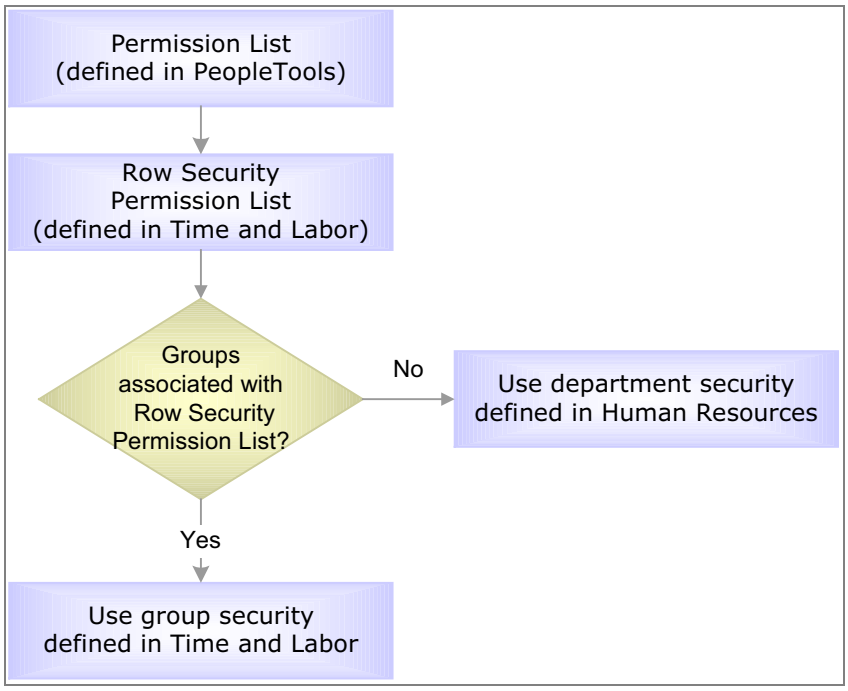
- If you use group security, you can view and enter time for all group members assigned to the row security permission list.

  You can assign groups to the row security permission list on 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 do not have groups assigned to a row security permission list, the system automatically uses department security.

  Department security is derived by determining the department ID you are assigned to, who you have access to in the department, and the departments that are children on the departmental security tree.

The following diagram shows the system criteria for using group or department security to determine the accessible time reporters.



System criteria for using group or department security

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 time frame.
- 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.

See Also

"Establishing Static and Dynamic Groups"

PeopleSoft Application Fundamentals for HRMS PeopleBook: Administering PeopleSoft Security

Using Row Security Permission Lists

Using row security permission lists comprises the following tasks:

- Creating row security permission lists.

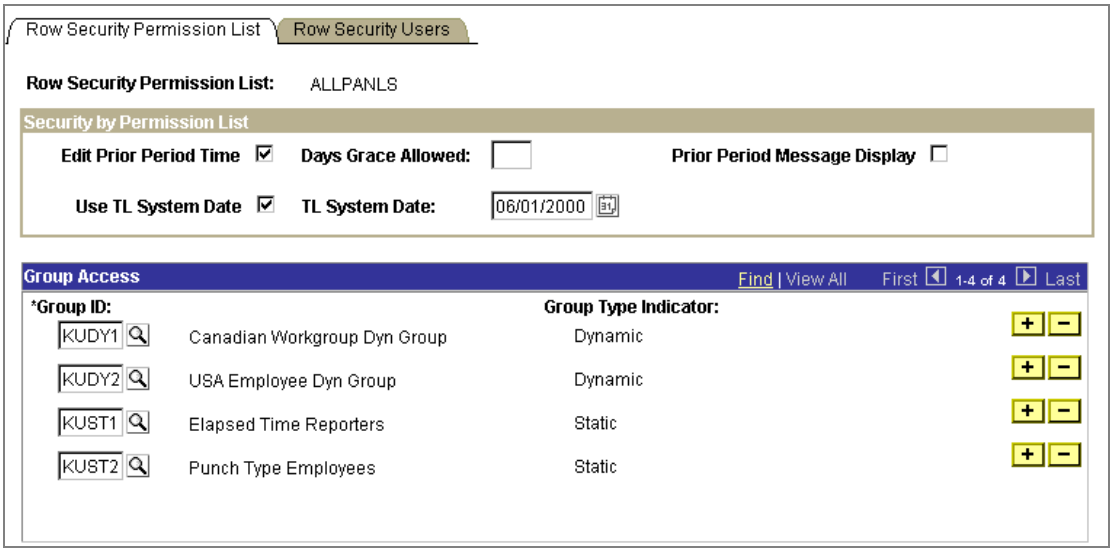
- Viewing row security users.

Pages for Using Row Security Permission Lists

Page Name	*Object Name*	*Navigation*	*Usage*
Row Security Permission List	TL_SECURITY_PNL	Define Business Rules, Define Time and Labor, Enroll, TL Permission List Security	Create security that limits a user's ability to access and update data for groups of time reporters.
Row Security Users	TL_ROWSEC_MEMBERS	Define Business Rules, Define Time and Labor, Enroll, TL Permission List Security, Row Security Users	View the user IDs associated with a particular row security permission list.

Creating Row Security Permission Lists

Access the Row Security Permission List page.



Row Security Permission List page

Security by Permission List

Edit Prior Period Time Select to give users associated with this permission list the ability to enter prior period adjustments for members of the groups identified in the **Group Access** grid.

A prior period adjustment is a time entry for a date that falls before the begin date of the time reporter's current period.

To determine if the time you're entering is a prior period adjustment, the system references the time reporter's time period ID. Then the system references 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 a prior period adjustment.

For example, assume that today is 16 August 2000 and you want to enter time for 1 August 2000. The time reporter is assigned a weekly time period. The system references the time period calendar to determine that today's date falls within the weekly time period with these dates: 6–18 August. Any time reported before August 6 (the begin date of the current period) is a prior period adjustment.

Note. You assign time period IDs to time reporters on the Maintain Time Reporter Data page. If none is specified, the system uses 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 to limit the period of time during which users can enter prior period adjustments.

Enter the number of days that the system uses to calculate the earliest date for which users can enter adjustments. During time reporting, the system subtracts this number from the current date and compares the resulting date to the time period calendar to find the start date of the time period in which the calculated date falls.

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, the system 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—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 cleared, users can enter or edit time in any prior period.

Prior Period Message Display — Select for the following message to appear above the blue horizontal rule 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 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. It enables you to select a date that the system will consider as the current date to test the defined functionality for prior period adjustments.

TL System Date — The **TL System Date** field appears only when you select the **Use TL System Date** check box. Enter the date for the system to consider as the current date for testing purposes.

Group Access

The **Group Access** grid identifies the time reporter groups that users associated with this permission list can access—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 is controlled by department security. Users will be able to enter and update time reporting information for those people within their own department and any subsidiary departments.

Group ID — Select the dynamic or static group of time reporters for users associated with this permission list to access.

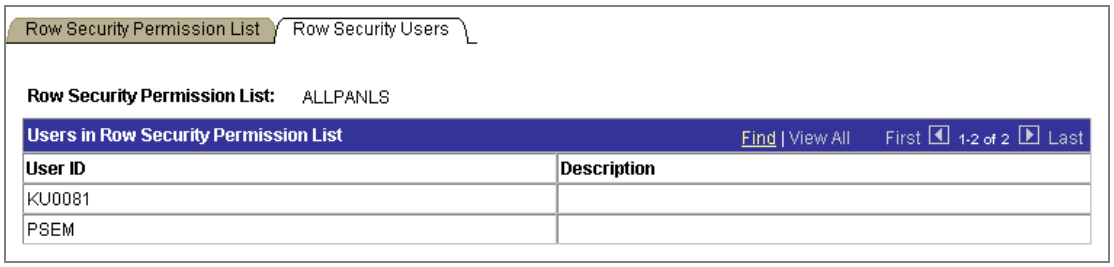
Group Type Indicator — This field indicates whether the selected group is dynamic or static.

See Also

"Establishing Static and Dynamic Groups," Creating and Updating Dynamic Groups

Viewing Row Security Users

Access the Row Security Users page.



Row Security Users page

The system displays the user ID and description of each member of this row security permission list.

Note. Assign row security permission lists to user ID's in the User Profiles component, on the PeopleTools menu.

CHAPTER 11

Creating Rules in Time Administration

Time Administration provides four online tools for creating, maintaining, and applying compensation, task, and exception rules to reported and scheduled time: templates, actions and conditions, SQL objects, and user exits. This chapter gives an overview of the Time Administration features, and discusses how to:

- Create rules from a template.
- Use actions and conditions to create rules.
- Create SQL objects.
- Define attendance programs.
- Create value lists.
- Define rule elements.
- Specify table access.
- Define table relationships.
- Assemble rules.
- Add rules to a rule program.

Understanding Time Administration

Although the processes involved in Time Administration are complex and varied, the Time Administration module can be reduced to the following main components:

Create Rules — Create Rules consists of the online tools that enable you to create, compile, and apply rules to reported and scheduled time. You can create rules for the batch process only or for both batch and online rules processing.

Batch Processing — Time Administration batch processing applies your rules to time reporter data and generates payable time from reported and/or scheduled time.

Online Processing — From the Weekly Punch Time and Weekly Elapsed Time pages, the Apply Online Rules process immediately applies your online rules to the time for a specific time reporter.

The Create Rules Component

The Create Rules component consists of the following online tools for rule definition.

Templates — Use templates to create a variety of rules for the Time Administration program to execute when processing reported and scheduled time: 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 delivered rule templates.

Actions and Conditions — Use Actions and Conditions to define actions and conditions independently of one another and then join them to create rules. You cannot perform select actions or subqueries with Actions and Conditions, so if your rule requires either of these, use SQL objects.

SQL Objects — SQL objects are the most flexible PeopleSoft Time and Labor rule creation tool. You can use SQL objects to create rules using Select statements, Insert statements, Update statements, Delete statements, table joins, and subqueries.

User Exits — With delivered rule templates and rule objects (Actions, Conditions, and SQL objects), you should be able to build rules that address most business needs. Use a user exit when a particular business rule cannot be accommodated by delivered rule templates or rule objects.

With user exits, you can add PeopleCode and PeopleSoft Application Engine (AE) sections to regular processing. Also, to build a complex Time and Labor rule, you can create the rule in Application Engine and add a user exit that calls the rule during processing.

When you write user exits, you must 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).

See Also

Defining Template-Built Rules

Using Actions and Conditions to Create Rules

Creating SQL Objects

PeopleTools PeopleBook: Application Engine

The Batch Processing Component

The batch process in PeopleSoft Time and Labor is the process that generates payable time. Among other things, it executes the rules defined 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

Following is an overview of the batch process in PeopleSoft Time and Labor. A detailed description of the batch process is presented in the chapter titled, "Understanding Batch Processing in Time Administration."

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 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 process only 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 workgroups to avoid processing large numbers of employees.

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 workgroup affiliation and common month and year.

Note. 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 in your processing rules. If the set is too large, the SQL statements comprising your Time Administration rules are not executed at the optimal rate. You must determine the optimal size of your batches, based on your operating environment and some trial-and-error runs.

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 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 AE section containing the rules that must be processed for each batch of time reporters.

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 reference when you need basic employee data within a rule. You can look at 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.

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).

6. Create Intermediate Payable Time.

   This process loads all reported and scheduled time (for the period of interest for all time reporters to be processed) into a temporary working data store called Intermediate Payable Time. This working data store comprises 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.

Note. In your Time and Labor rules, you'll manipulate 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.

7. Track attendance.

   This process tracks attendance violations committed by punch time reporters, including tardies, long lunches, early outs, and long breaks, and triggers recommended actions to log in the Attendance Action (TL_ATTEND_ACT) table in response to these violations.

8. Process rules.

   This process uses the rule map 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.

9. Perform postrules processing.

   Once rules execution is complete, the system carries out 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 compensatory time balances.
   - Applies postrules rounding to processed time data.
   - Calculates estimated gross amounts.

10. Prior period adjustment processing.

    This process generates offsets in response to changes in reported time and effective-dated information that affects Payable Time.

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 PeopleSoft Time and Labor.

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 is updated, go to the Manage Exceptions page to approve or resolve exceptions.

13. Update TR Status.

    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.

See Also

"Understanding Batch Processing in Time Administration"

The Online Processing Component

PeopleSoft Time and Labor enables you to define online rules and immediately estimate the effect of applying these rules to weekly elapsed and punch time. You can invoke the Apply Online Rules process from two time reporting pages: the Weekly Elapsed Time page and the Weekly Punch Time page. When you do, the system executes an abbreviated version of the Time Administration process for a selected time reporter, applying only those rules that are defined for both batch *and* online processing. (You specify the maximum number of online rules that can be added to a rule program when you complete the TL Installation page during implementation.)

The system begins by looking at the transactions entered on the time reporting page. Depending on your rule definitions, it may pull in and process time for up to 14 days; however, it only displays the results for the current week.

When you define a rule for both online and batch use, be sure the time period that the rule evaluates does not exceed 14 days. Templates for attendance rules, such as templates 360, 360A, 360B as well as templates for exception rules 300, 310 and 320 may be better suited for batch processing.

Estimated payable time that is created by the online process is assigned the payable time status, *online estimate* (OE). The next time you run the Time Administration batch process, the system deletes online estimates and replaces them with payable time in an *estimated* or *needs approval* payable status.

To create actual payable time, run your rules as part of the batch Time Administration process; however, online processing enables you to preview the effect of weekly elapsed and punch time rules directly, online, in advance of the batch run. In addition, you can detect and resolve user-defined exceptions that result from the application of online rules.

Online Processing Steps

The Apply Online Rules process bypasses the following phases of processing, which are executed during the batch Time Administration run:

- Attendance processing
- Offset processing
- Compensatory time balance validation
- Calculation of estimated gross for rule override transactions.
- Updating TA_STATUS and EARLIEST_CHGDT.

Common Elements Used in This Chapter



Click to view the SQL text of the action, condition or SQL object.

Understanding Rules

All rules in PeopleSoft Time and Labor are written in SQL—whether you are using the delivered templates to build rules, actions and conditions, or SQL objects. However, because you will probably create most rules using templates, and the templates already contain the basic logic, underlying structures, and all the necessary SQL, 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 direct access to SQL logic and language. In addition, to properly create, test, and troubleshoot rules, you should understand the structure of a SQL statement and the basic procedures for converting business rules into SQL rules.

General Setup Steps

There are two setup steps to perform prior to creating rules if you are using either actions and conditions or SQL objects to define your rules:

- Specify which tables (or records) you will access in your rules and what SQL actions to allow or prevent your rules developers from performing on these tables.

You'll do this using the Working Tables page.

- If you create a condition that references a field that is not part of the record being updated, define a relationship definition (or join) between the record you are updating and the external record.

To do this, use the TL Relationship Definitions page. Setting up a relationship definition eliminates the need to code this relationship. If you are creating rules using actions and conditions, set up this relationship definition beforehand (if you must refer to external tables). You cannot define a table join within the rule itself. If you are using SQL objects, create a table join directly in the rule.

See Also

Specifying Table Access

Defining Table Relationships

Assembling Rules from Actions and Conditions and SQL Objects

When you use the Actions and Conditions or the SQL Objects pages, you won't create full-fledged rules, but the building blocks of rules—*rule components.* To define a complete rule, you must:

- Link these components to other components.
- Place the components in the proper order for processing (define rule steps).
- Specify the period of interest for the resulting rule.
- In addition, you must group rules into Rule Programs and then link these rules to time reporters through workgroups.

Creating a complete rule involves the following steps:

Note. Template-built rules are fully defined rules. This means that you don't need to define the rule steps that make up a template built rule. However, you do need to add template built rules to rule programs on the Rule Programs page and assign the rule program to a workgroup.

To complete your rule definition:

1. Define the rule components.

   Use Actions and Conditions or SQL Objects.

2. Define the rule period.

   Specify the period of interest for the rule using the Define Rule Header page. Valid periods include PeopleSoft-delivered periods and any time periods created using the Time Period pages. The system uses time periods to determine the data for a particular span of time on which the rule will act. 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 defined the individual building blocks that make up a rule using actions and conditions or SQL objects, you must combine these components into complete rules and place them in the correct processing order by arranging them into *rule steps.* Each rule can have one or multiple steps. You'll order individual rule components into rule steps on the Define Rule Steps pages. SQL processes the records in sets. Rule steps must be properly ordered for set processing. Review delivered rule templates (with the rule ID prefix of TEMPLATE) to see how rule steps are organized for set processing. Test the SQL statement for each rule step with the database query tool to ensure that it produces the desired results before continuing with the next step. You may need to replace meta-SQL with platform specific SQL before testing the SQL statement.

4. Assign the rule to a rule program.

Add your rules to a rule program using the Rule Program and Program Detail pages. The rule program specifies the set of rules and the order in which the Time Administration process executes them.

Note. The number of online rules you can include in a rule program is determined by the entry in the Maximum Online Rules field on the TL Installation page.

Note. 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.

5. Attach the rule program to a workgroup.

   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.

See Also

Using Actions and Conditions to Create Rules

Creating SQL Objects

"Establishing Workgroups"

Assembling Rules

Rule Step Creation Guidelines

When you create rules in Time Administration, you are translating your organization's business rules into SQL statements for the system. While the Time Administration pages enable you to implement rules, they are not design tools. So, before you enter any information in these pages, design and organize your rule steps, consider the SQL involved, and decide which Time Administration options to use. This section provides guidelines for understanding, designing, and organizing rule steps. The end of this section provides an example that outlines more explicitly how to enter rule steps into the system.

Note. Use the simplest building blocks when creating rules. Whenever possible, use or modify the delivered rule templates rather than creating new actions and conditions or SQL objects to define rules.

Designing and Organizing Rule Steps

Determine whether you can use one of the delivered rule templates or if you must 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, 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, define that data or subquery first. If you want to act only 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, think about processing order. For example, if you must compare daily reported time to daily scheduled hours, sum the daily reported time and scheduled time first. Although the comparison and summation could be a single step, keep each step relatively simple for maintenance and troubleshooting. Specify and order rule steps on the Define Rule Steps page.

Avoid broad or redundant querying or 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, define a valid rule period ID for 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.

Warning! 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 creating rules in PeopleSoft Time and Labor, have a clear idea of how you manage both time and time reporters. 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 has 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 moves 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 comprises 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.

Note. You can create your own working tables to store data temporarily, but they must be temporary tables.

Rules for Using Working Tables

When you create rules in Time Administration, keep the following things in mind:

- Time Administration automatically loads much of the data for executing 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, 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, return any processed data to send to Payable Time back to TL_IPT1—the table with the original, raw data. That is, push the data in its final form—the form in which to the data 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 ensures that the data that remains in those tables from previous rules processing does not interfere with or corrupt the new data. To truncate any working table, use the %TruncateTable command, which is included in the list of meta-SQL commands supported by PeopleSoft. However, never truncate or delete the data in TL_IPT1—it contains raw time data to execute your rules. Delete this data and your rules have 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 must verify it (in a condition statement, for example), consider reading the external tables directly rather than moving large quantities of information into the working tables. Moving large quantities of data into TL_IPT1 could affect processing speed.

Example: Translating a Business Rule Into a SQL Rule

The following example illustrates 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. 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, determine what type of action for the system to take. Most business rules 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 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 seven steps. Steps one through two are actions; steps three through seven are SQL objects.

1. Delete TL_IPT2 (truncate working table)
2. Delete TL_IPT3 (truncate working table)
3. Insert affected row (Friday, 10, 46, REG) into TL_IPT2 with hours over threshold and new TRC.
4. Insert rows after affected row (Saturday, 6, 52, REG) into TL_IPT3.
5. Calculate TL_QTY-TL_QTY in work record (TL_IPT2) and update row (Friday, 10, 46, REG becomes Friday, 4, 40, REG) in TL_IPT1.
6. Insert new row (Friday, 6, 46, OT1.5) into TL_IPT1 with new sequence number.
7. Update TL_IPT1 TRC with 'ot1.5' where exists in TL_IPT3.

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.

Data in IPT1

Day	*Hours*	*Total Week Hours*	*TRC*
Monday	8	8	REG
Tuesday	10	18	REG
Wednesday	8	26	REG
Thursday	10	36	REG
Friday	10	46	REG

Day	Hours	Total Week Hours	TRC
Saturday	6	52	REG

Data in IPT2

Day	Hours	Total Week Hours	TRC
Friday	**4**	40	REG
Friday	6	46	**OT 1.5**

Data in IPT3

Day	Hours	Total Week Hours	TRC
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.

See Also

Defining Rule Steps

Using Value Lists Within Rules

When you want the condition or action clause of a rule to apply to multiple values—such as multiple TRC codes, multiple shifts, or multiple task groups—create value lists rather than defining multiple conditions.

For example, you have a rule that tells the system to create premium time when a 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: 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
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
TCD Groups	PS_TL_TCDGRP_TBL
Taskgroups	PS_TL_TASKGRP_TBL
TRCs	PS_TL_TRC_TBL
Union Codes	PS_UNION_TBL
Workgroups	PS_TL_WRKGRP_TBL

Rule Elements Within Rules

To control how and when rules are applied to different groups of time reporters, use rule elements. You can define up to five rule elements to represent any type of data, and then use these elements within the conditions for your rules.

Rule elements can be associated with time reporters by:

- Assigning rule elements directly to time reporters on the Create Time Reporter Data page or the Maintain Time Reporter Data page.
- Positively reporting rule elements when entering time.

See Also

"Setting Up Time Reporters"

Example: Defining and Using Rule Elements

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 Time Reporter Data page or the Maintain Time Reporter Data page.

Note. Both the Time Reporting Template page and the Rapid Time Template page include options to override rule elements.

Using Meta-SQL Within Rules

Use meta-SQL as an alternative to creating complex SQL commands on your own. Meta-SQL enables 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.

Using Common HR Data in Your Rules

To use PeopleSoft Human Resources or PeopleSoft Time and Labor employee data within your rules, check whether the data exists in TL_PROF_WRK before creating multiple joins to tables in Human Resources. 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 must 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	Rehire 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 or temporary indicator
14	FULL_PART_TIME	JOB	Full-time or part-time indicator
15	EMPL_TYPE	JOB	Employee type indicator (Hourly, Salaried, and so on.)
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

Note. 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.

See Also

"Understanding Batch Processing in Time Administration," Step 4 - Building Time Reporter Profiles

Prioritizing Rules in a Rule Program

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 overtime (OT1.5) for hours worked in excess of 40 per week.

In this example, rules two through four evaluate time with a TRC of REG. In addition, rules two through four are replace-type rules (in which REG is reduced to the threshold number and a new TRC created for the excess hours). Based on this information, order your rule program as follows:

1. Default TRC – because other rules must evaluate TRC REG.
2. Daily 12 – it needs to be executed before the Daily 8 rule because, if hours are over 12, REG is 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).

Selecting Time Periods for a Rule

When creating rules, carefully analyze the time period to use. For rules that apply to punch time reporters, evaluate your daybreaker and the relationship between the out punch of one day and the in punch of the next day. In many cases, you may need to apply a time period greater than a day for the proper evaluation of a "daily" rule.

See Also

"Setting Up Basic Tables," Time Periods and Establishing Time Periods

"Establishing Workgroups," Defining Workgroups, Setting Up Day Breaker Options

Testing Rules

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.

See Also

Creating Rules From a Template

Creating Value Lists

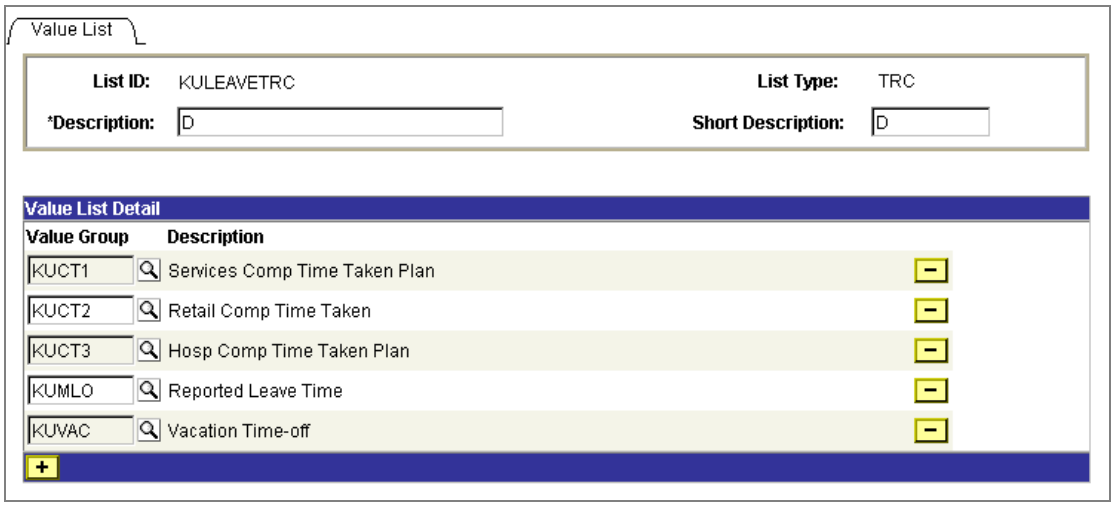
Creating value lists consists of grouping various codes together for rules processing.

Page Used to Create Value Lists

Page Name	*Object Name*	*Navigation*	*Usage*
Value List	TL_VALUE_LST_PNL	Define Business Rules, Define Time and Labor Rules, Setup 1, Define Value List	To group together various codes for rules processing.

Grouping Codes Into Value Lists

Access the Value List page.



Value List page

Value List Detail

Value Group Select the values to include in your list. Press the add button to add another value to the list.

Defining Rule Elements

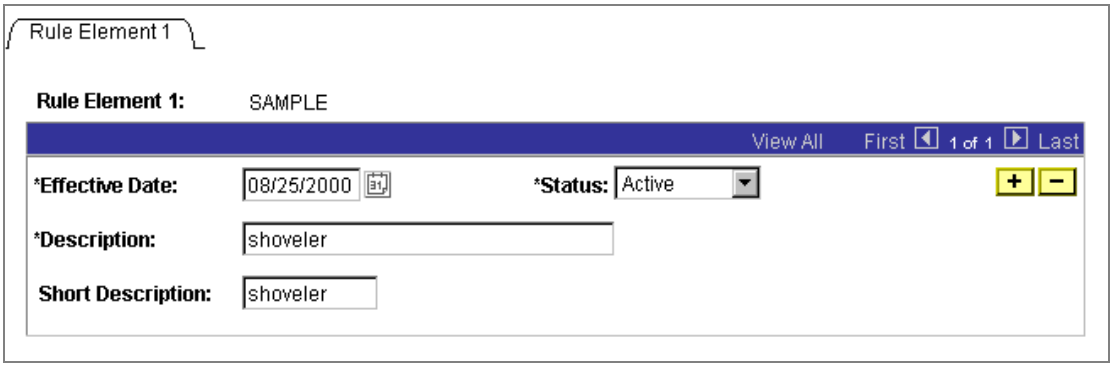
Defining rule elements consists of creating values that the system can evaluate.

Pages Used to Define Rule Elements

Page Name	Object Name	Navigation	Usage
Rule Element 1 *through* Rule Element 5	TL_RULE_ELEM*(X)*_PNL **Note.** *(X)* equals the number corresponding to the number on the rule element page name (1-5).	Go, Define Business Rules, Define Time and Labor, Setup 2, Rule Element, Rule Element	To create user-defined values that the system can evaluate during the Time Administration process.

Creating User-Defined Rule Elements

Access the appropriate Rule Element page.



Rule Element 1 page

Note. If you want to relabel the rule element fields, see the instructions in your PeopleTools PeopleBook.

Specifying Table Access

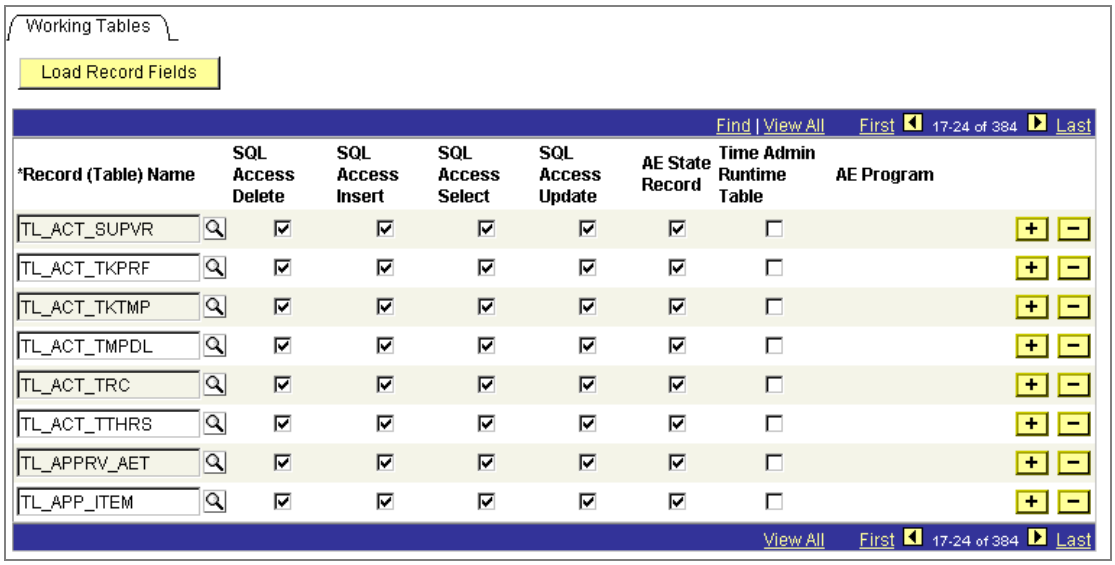
Before creating rules using actions and conditions or SQL Objects, identify the tables (or records) to access and the actions to allow or prevent on these tables. This task consists of granting access to tables in PeopleSoft Time and Labor and PeopleSoft Human Resources.

Page Used to Grant SQL Access to Tables

Page Name	Object Name	Navigation	Usage
Working Tables	TL_TA_WORK_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Working Tables, Working Tables	To grant SQL access to tables in the PeopleSoft Time and Labor and PeopleSoft Human Resources systems.

Granting SQL Access to Tables

Access the Working Tables page.



Working Tables page

The tables listed in the **Record (Table) Name** column are the records and tables to which you can grant (or deny) SQL access. Although we have predefined access to many tables in the PeopleSoft Time and Labor system, you can change the delivered settings and can insert new rows for additional tables that you must 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 PeopleTools tables.

SQL Action Elements

SQL Access Delete (structured query language access delete)

Select 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 (structured query language access insert)
Select to be able to insert rows in the table listed in the **Record (Table) Name** field.

SQL Access Select (structured query language access select)
Select to be able to select fields in the table listed in the **Record (Table) Name** field.

SQL Access Update (structured query language access update)
Select to be able to update rows in the table listed in the **Record (Table) Name** field.

Additional Elements

AE State Record (application engine state record)
The checkboxes in the **AE State Record** column enable you to specify which AE state records rules developers can access when they create SQL objects. If a state record does not exist on 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, enter rows for these records on the Working Tables page and specify those to make available in your SQL objects.

Time Admin Runtime Table (time administration 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 are deleted during batch processing. Deletion can take place at two points—one is within the loop Time Administration runs for each batch, and the other is at the beginning of the entire Time Administration process. If a runtime table does not exist on the Working Tables page and is not defined for deletion, it isn't 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 must enter rows for these tables on the Working Tables page and specify the AE program that they are part of.

AE Program (application engine 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, 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, click the **Load Record Fields** button to 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 **Load Record Fields,** 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 isn't truncated during the batch run. The Working Tables panel is delivered with the PeopleSoft-delivered runtime tables for Time Administration preselected for deletion (truncation). If you create new runtime tables, enter rows for these tables on the Working Tables panel and specify the AE program they belong to.

Defining Table Relationships

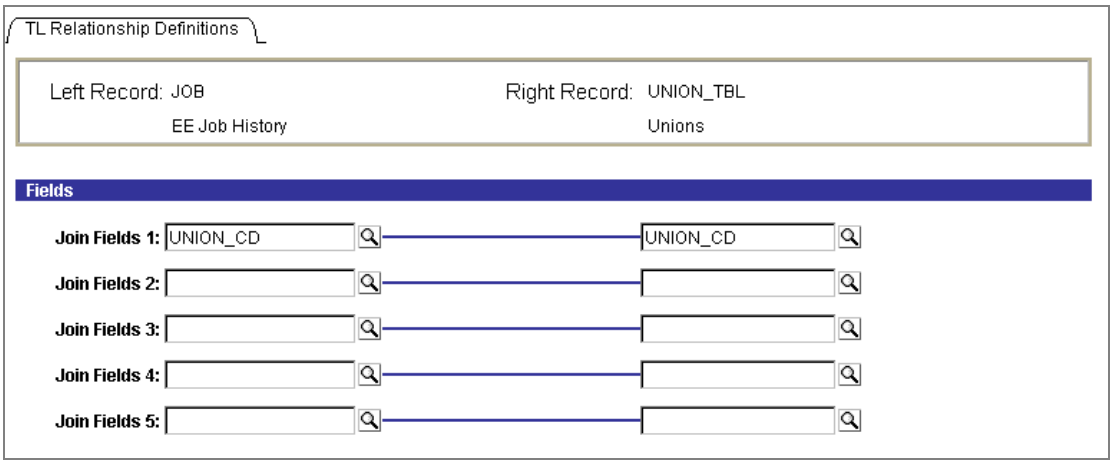
Defining table relationships consists of joining fields on different record tables.

Page Used to Define Table Relationships

Page Name	*Object Name*	*Navigation*	*Usage*
TL Relationship Definitions	TL_RELATIONSHIP	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Relationship Definitions, TL Relationship Definitions	To create relationships between tables.

Creating Table Relationship Definitions

Access the TL Relationship Definition page.



TL Relationship Definitions page

Fields

Join Fields 1-5 Enter the fields from each table that the system must use to create a relationship between the tables.

Define a relationship definition when you use a condition that references a field that is not part of the updated record.

Example

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:

```
UPDATE PS_TL_IPT1
SET TRC = 'DBL'
```

The two conditions for this statement:

```
WHERE PS_TL_IPT1.TRC = 'REG'
AND PS_JOB.UNION_CD = 'ABC'
```

To identify the correct effective-dated row and sequence from the JOB table, we would need several additional lines of code comparing the employee IDs, employee record numbers, and dates in the TL_IPT1 and JOB tables. Setting up a relationship definition eliminates the need to code this relationship individually.

Defining Template-Built Rules

PeopleSoft Time and Labor delivers over 40 rule templates. Use templates to create a variety of rules for 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, enter values for the variables within the template's condition and action statements. For example, 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:

"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. Add the rule to a rule program on the Rule Programs page and assign the rule program to a workgroup.

See Also

Adding Rules to a Rule Program

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 modify rules by changing the actions or conditions (not simply the values within the conditional clauses), or by defining your own SQL Objects.

Before you modify a template-built rule, you need to understand how the values you have defined are stored and accessed. When you save your rule under a unique rule ID, the rule is compiled and the values you have entered are stored in the record TL_TMPLT_RULE2, replacing a generic *rule parameter* in the template called %RuleTemplate() that acts as a placeholder for each variable you have defined. (A rule parameter is a variable that gets substituted with a user-defined value when a template-built rule is compiled.) The record TL_TMPLT_RULE2 tracks, by rule ID, the values that will be resolved in each rule step. Because the same rule parameter represents all the values you define in a template-built rule, and there may be multiple instances of %RuleTemplate() in a single rule, and even in a single rule step, the record TL_TMPLT_RULE2 identifies the different occurrences of %RuleTemplate by step and sequence number.

When you modify a rule you have defined using the Define Template-Built Rules component, you have several options:

1. You can copy the rule and name a new rule using the Copy Rules page. When you copy the rule, however, you need to change the AE section to represent the new rule. In addition, for every occurrence of %RuleTemplate(), you need to substitute actual values by defining your own SQL Objects. The reason for this is that the connection is broken between the original rule ID and the values stored in the record TL_TMPLT_RULE2.

2. Another option is to modify the existing rule using the Define Rules component by changing one of the rule steps, or by adding a new step or substituting a different SQL Object or action and condition in place of one originally created from the rule template. You must then compile this new rule. However, if you customize a rule in this way, the only way to view or make future changes to the rule is to use the Define Rules

component—you can no longer access the rule through the Define Template-Built Rules component.

Although this kind of modification (in which you do not change the rule ID, but change actions and conditions, or add new rule steps) may not break the connection between the rule and the values contained in TL_TMPLT_RULE2, we recommend that you do not rely on this connection, but instead do the following:

- If you are adding a new step to a rule, or changing an existing step or object, hard code the values you want to use in that step (replace %RuleTemplate() with actual values), and recompile the rule.
- If you are only deleting a step, you do not need to worry about the connection being broken, but you should recompile the rule.

Note. When modifying a rule, always test the rule to make sure that it functions as you expect.

3. A third option is to create a new rule ID from the same rule template, modify this rule using the Define Rules component, and compile the new rule. In this way, you can keep the original rule to use when needed, and have a newly modified rule to work with.

Note. To change a rule that is already in a rule program, temporarily remove the rule from the rule program before changing it. After changing the rule, reassociate the rule to a rule program. This safeguard protects the integrity of data generated by the original rule. After saving the new rule, be sure to update the appropriate rule program.

Delivered Templates

The following tables list the rule templates delivered with PeopleSoft Time and Labor. They are presented alphabetically by template type. The possible variables are in uppercase letters.

The **Combine Data?** heading identifies whether the Time Administration process combines the results for time reporters with multiple jobs. Results are combined only if each job (employee record) is in the same workgroup. (The employee records do not need to be in the same run of the Time Administration process to be combined.)

The Punch, Elapsed or Both Column indicates whether the rule template applies to punch time reporters, elapsed time reporters or both types of time reporters.

Accumulator Templates

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template 520	Inserts the sum of selected TRCs into the Accumulator table (TL_IPT1_CNT). If you include more than one rule that updates the same TRC in the same rule program, the system overwrites the accumulator value each time it is resolved.	When a time reporter reports time under TRCs (1)SPECIFIED_TRCs save the sum of hours into the (2)SPECIFIED_ACCUMULATOR Accumulator.	Y	Both
Template 540	Loads a value from the Accumulator table to the specified TRC (see Template 520 for more information). Rules created with this template should not be used alone. For example, you might execute the rule before applying a rule created with template 020.	Load (1)SPECIFIED_ACCUMULATOR Accumulator.	N	Both
Template 550	Similar to Period Threshold Template 020, but the threshold is determined by another TRC List.	When the hours of ACCUMULATOR (1)SPECIFIED_ACCUMULATOR are greater than the hours of ACCUMULATOR (2)SPECIFIED_ACCUMULATOR in the specified period, then all hours in excess are paid under (3)SPECIFIED_TRC TRC.	Y	Both

Approval Required Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template180	All time reported to specific TRC or TRC list will require manager approval prior to being paid. This template is not available for online rules. The system sets payable status for online rules to *Online Estimate*, not *Needs Approval*.	All time reported to TRCs (1)SPECIFIED_TRC or (2)SPECIFIED_TRC_LIST requires 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.	N	Both

Attendance Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 360	If a time reporter doesn't report SICK for x number of days, create y hours of compensatory 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.	N	Elapsed
Template360A	If a time reporter 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.	N	Punch

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template360 B	If a time reporter 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_DURATIO N 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.	N	Both

Consecutive Days Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template110	If a time reporter works x consecutive days, then all hours on day x pay specific TRC. (Create or replace.)	When a time reporter reports more than (1)SPECIFIED_HOURS hours under TRCs (2)SPECIFIED_TRC_LIST in a day for (3)SPECIFIED_DURATIO N consecutive days, then all time reported for day (3)SPECIFIED_DURATIO N will be paid under TRC (4)SPECIFIED_TRC.	Y	Both
Template111	If a time reporter works x consecutive days, then all hrs < 8 on seventh day get paid specific TRC, while all hrs > 8 on seventh day get paid another specified TRC. (California 7 Day Rule) (Create or replace.)	When a time reporter worked 7 consecutive days in the state of California and reported time under TRCs (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.	Y	Both

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template120	If a time reporter works x consecutive days, then all hours on days >= x pay specific TRC. (Create or replace.)	When a time reporter reports more than (1)SPECIFIED_HOURS hours in a day under TRCs (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.	Y	Both

Daily Threshold Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template010	Pay OT for all hours in a day > x. (Create or replace.)	When a time reporter reports time under TRCs (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.	Y	Both

Default Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template130	Replace all hours reported without a time reporting code to x.	This rule will assign any hours without a TRC to TRC (1)SPECIFIED_TRC.	N	Both

Exception Templates

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template140	If a time reporter 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 TRCs (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. The results for multiple jobs combine to Empl Rcd 0 for rule evaluation.	Y	Both
Template150	If a time reporter 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. The results for multiple jobs combine to Empl Rcd 0 for rule evaluation	Y	Both
Template210	If a time reporter 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.	N	Punch

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template230	Create Exception when time is reported and the employee'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)SPECIFED_EMPLOYEE_STATUS_LIST.	N	Both
Template240	Valid punch types to follow a punch type.	When a punch type of (1)SPECIFIED_PUNCH_TYPE is followed by one of the following punch types (2)SPECIFIED_LIST_OF_PUNCH_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 (For example, an IN punch must always follow an OUT punch, and so on). This rule could work in conjunction with Exception Template 250.	N	Punch
Template250	Create exception if a time reporter 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_TYPE, create exception (1)SPECIFIED_EXCEPTION . This rule helps 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, and so on), then create a rule that would create an exception when an IN punch > 10 hours.	N	Punch

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template280	If a time reporter 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.	Y	Punch
Template300	Average hours per week threshold – Weekly rolling period.	When a time reporter reported time under TRCs (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 must have a weekly rolling period ID assigned (For example, first period is week 1 through week 10, second period is week 2 through week 11, and so on).	Y	Both

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template310	Average hours per week threshold – Daily rolling period.	When a time reporter reported time under TRCs (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. This template expects to have a Daily rolling period ID assigned (for example, first period is day 1 of week 1 through day 7 of week 10, Second period is day 2 of week 1 through day 1 of week 11, etc).	Y	Both
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 TRCs (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.	Y	Punch
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.	N	Punch

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
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..	N	Punch
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.	N	Punch

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
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 or 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 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.	N	Both
Template430	If a time reporter reports vacation time on a day that is in a future period, create exception. This template is not available for online rules.	Create exception (1)SPECIFIED_EXCEPTION when a time reporter reports TRCs (2)SPECIFIED_TRC for a future period.	N	Both

Guaranteed Hours Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template030	If a time reporter reports hours on nonscheduled day, then they are guaranteed x number of hours.	When a time reporter reports hours to TRCs (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.	Y	Both
Template031	If a time reporter 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 TRCs (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.	Y	Both

Holiday Templates

For proper evaluation of all holiday rules, use a time period for the rule that is greater than one day.

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template060	Pay all time reporters HOL for a holiday. (Create or replace.)	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.	N	Both
Template070	Pay HOL for a holiday only if a time reporter worked day before and day after holiday. (Create or replace.)	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.	N	Both
Template071	Pay HOL for a holiday only if a time reporter worked the day before or day after holiday. (Create or replace.)	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.	N	Both

Name	*Description or Example*	*Rule*	*Combine Data?*	*Punch, Elapsed or Both*
Template080	If a time reporter works on a holiday, create X pay premium for each hour reported. (Create or replace.)	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.	N	Both
Template420	Pay part-time time reporters 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.	N	Both

Meal Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template160	If a punch time reporter works more than x number of hours, then deduct y hours for meal.	When a punch 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 automeal deduct rules are created for one rule program, only one will apply.	Y	Punch

Miscellaneous Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template530	Deletes the results of selected TRCs before the system updates the TL_PAYABLE_TIME table.	Remove (1)SPECIFIED_TRC TRC.	N	Not applicable
Template560	Performs calculations (add, subtract, multiple, or divide) between a TRC and a specified value.	TRC (1)SPECIFIED_TRC = (1)SPECIFIED_TRC (2)SPECIFIED_CALCULATION (3)SPECIFIED_VALUE.	N	Not applicable

Missing Punch Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template260	Update duration for specified PUNCH_TYPE with user-specified duration.	When a time reporter reports more than (1)SPECIFIED_DURATION hours for a (2)SPECIFIED_PUNCH_TYPE punch, then update time reported to (3)SPECIFIED_DURATION hours.	N	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 (2)SPECIFIED_PUNCH_TYPE punch, then update time worked to scheduled hours.	N	Punch

Period Threshold Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template020	Pay overtime for all hours in a week > x. (Create or replace.)	When a time reporter reports time under TRCs (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.	Y	Both
Template021	Pay overtime for all hours in a week > x to the day the a time reporter worked overtime. (Create or replace.)	When a time reporter reports more than (1)SPECIFIED_HOURS hours under TRCs (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.	Y	Both

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template510	Determines if overtime hours exceeds a specified value. (Replace)	When a time reporter reports time under TRCs (1)SPECIFIED_TRCs and the sum of hours ((1)SPECIFIED_TRCs + (2)SPECIFIED_ACCUMULATOR) in the (3)SPECIFIED_PERIOD period is greater than (4)SPECIFIED_HOURS hours, then all hours in excess of (4)SPECIFIED_HOURS will be paid under (5)SPECIFIED_TRC TRC.	Y	Both
Template550	Similar to Period Threshold Template 020, but the threshold is determined by another TRC List.	When the hours of ACCUMULATOR (1)SPECIFIED_ACCUMULATOR are greater than the hours of ACCUMULATOR (2)SPECIFIED_ACCUMULATOR in the specified period, then all hours in excess are paid under (3)SPECIFIED_TRC TRC.	Y	Both

Premium Zone Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template100	If a time reporter 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.	N	Punch

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template090	If a time reporter 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 within the specified time frame, this rule will create a TRC for all hours worked, even when the time reporter punches out after the specified time frame.	N	Punch

Schedule Deviation Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template050	If a time reporter 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.	N	Both

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template290	If a time reporter 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 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.	N	Punch
Template440	Replace with nearest schedule.	If a time reporter reported an In punch more than (1)SPECIFIED_GRACE_EARLY minutes early or (2)SPECIFIED_GRACE_LATE minutes late, then change their schedule for the day to the schedule with the closest start time to the reported In punch, using the following list of shifts: (3)SPECIFIED_SHIFTS.	N	Punch

Shift Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template190	Create premium if a time reporter 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.	N	Both

Specific Day Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template040	If hours exist on a specific day, then replace all hours with another TRC. (Create or replace.)	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.	Y	Both

Task Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template170	If a time reporter 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.	N	Both

Creating Rules From a Template

Creating rules from a template comprises the following tasks:

1. Defining general information for a rule.

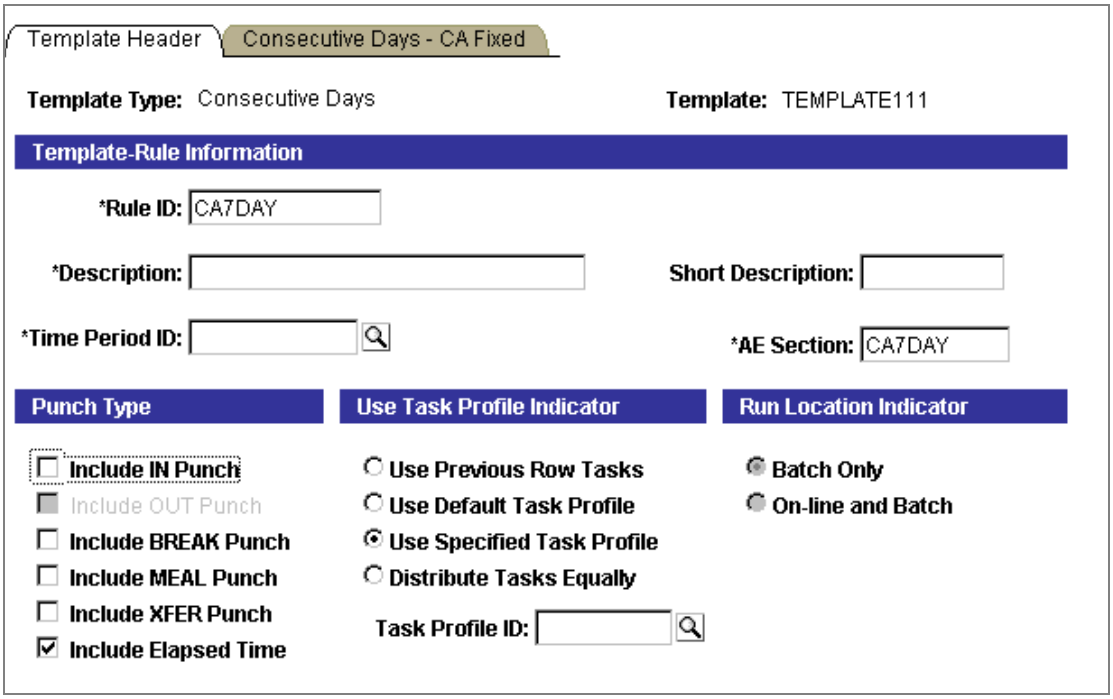
2. Defining the condition and action for the rule.

Pages Used to Create Rules From a Template

Page Name	*Object Name*	*Navigation*	*Usage*
Template Header	TL_TEMPLATE_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Template-Built Rules, Template Header	To define or view general information for a rule.
TL Template *(XXX)* **Note.** *(XXX)* represents the number of the template you're using.	TL_TEMPLATE*(XXX)* _PNL **Note.** *(XXX)* represents the template number you are viewing.	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Template-Built Rules.	To define or view what the rule will do (the condition and the action).

Defining and Viewing General Information for a Rule

Access the Template Header page.



Template Header page

Note. Template-built rules are not effective-dated, however they are associated with an effective-dated rule program.

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. Select the appropriate time period ID for a rule. For example, suppose that a period rule is to evaluate seven days worth of data. You want to make sure that the specified time period ID contains exactly seven days to produce accurate results.

AE Section — Create a name for the application engine section 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** region, select one or more punch types to apply the rule to and select **Include Elapsed Time**, when applicable. For example, if you're creating an overtime rule, select **Include IN Punch, Include BREAK Punch,** and **Include XFER Punch.** When a template applies only to punch time reporters, the option to include elapsed time is unavailable.

Include IN Punch — The rule is applied to In punches.

Include OUT Punch — The rule is applied to Out punches.

Include BREAK Punch — The rule is applied to Break punches.

Include MEAL Punch — The rule is applied to Meal punches.

Include XFER Punch — The rule is applied to Xfer punches.

Include Elapsed Time — The rule is applied to Elapsed Time.

Use Task Profile Indicator

When defining a rule that will create rows of time, 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 create data. The options in this region are unavailable if a rule replaces data or generates an exception.

Template020 is an example of a rule that can *create* data. It says: "When a time reporter reports time under 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 is 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 region 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*	*Task Profile Reported*	*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 that it associates with the 4 hours (in this case, department), depends on the selected task profile indicator:

Use Previous Row Tasks Select for the system to use the task profile associated with the row of data where the condition was met.

Example: The 4 hours of OT is associated with task profile B, since this was the profile to which the 40th hour was reported.

Use Default Task Profile If you select this option, the system looks at the time reporter's default task profile to determine which task-related data to associate with the new time.

Example: suppose that the default task profile says that time should be reported to department C. In this case, the 4 hours of OT is 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 for the system to use to determine which task-related data to associate with the new time.

Example: suppose that 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 for the system to first determine the percentage of time the time reporter reported to each task profile, then use the same percentages to allocate the created time across the reported task profiles. The system distributes the tasks equally to the newly created time, based on the task profiles reported for the rule period.

Example: Of the 44 hours reported, 26 (or 60 percent) were reported to task profile A and 18 (or 40 percent) were reported to task profile B. The system allocates 60% of the 4 OT hours (or 2.40 hours) to task profile A and 40% of the 4 OT hours (or 1.60 hours) to task profile B.

Task Profile ID This field appears only when you select the **Use Specified Task Profile** option. Select the task profile to use.

Run Location Indicator

These fields are available only if you have activated the Run On-line Rules option on the TL Installation page.

Batch Only Select for the system to apply this rule when you run the Time Administration batch process.

On-line and Batch Select for the system to apply this rule when you run the Time Administration batch process or the Apply Online Rules process, which you start from the Weekly Elapsed Time page or the Weekly Punch Time page.

See Also

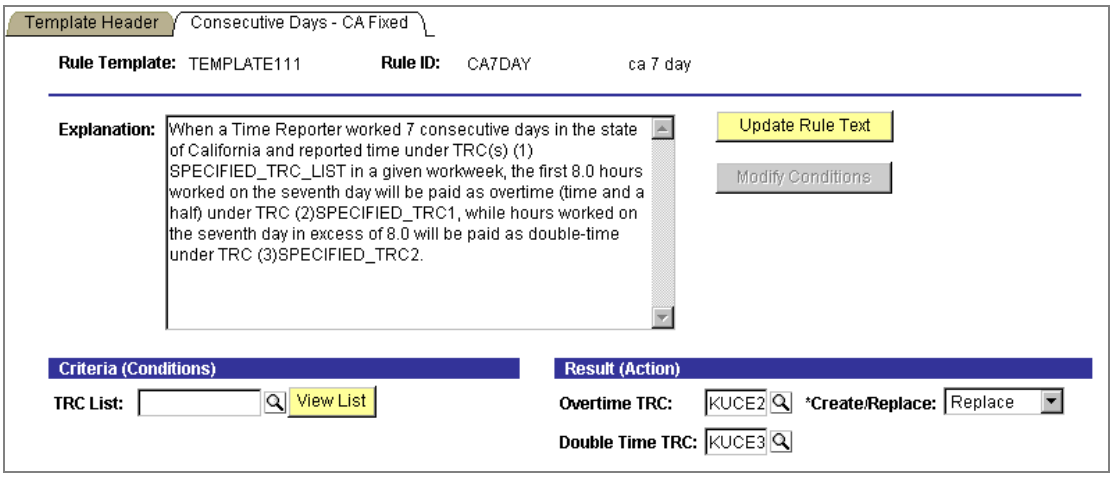
"Setting Up Your Basic Tables," Understanding Time and Labor Implementation

The Online Processing Component

"Defining Task Reporting Requirements"

Defining and Viewing Template Rule Conditions and Actions

Access the TL Template *(XXX)* page.



TL Template *(XXX)* page

Explanation Explains what the rule does when you run the Time Administration process. The description includes both a condition and an action. 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 to see the values 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 is saved. It takes you to the Entering Basic Information About a Rule, which you can use to modify the conditional clause of the rule. This feature is designed for users who understand SQL.

If you use the Entering Basic Information About a Rule to modify the condition within a template-built rule, you cannot view the rule or change its values in the Template-Built Rules component. All future changes must be made on the Define Rules page.

Criteria (Conditions)

Use the fields in this region to define the exact conditions that must be met to trigger the rule. 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

Note. The fields that appear in the Criteria (Conditions) region 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 is 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.

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. This cannot exceed 14 for online rules processing.

Duration Enter a number of hours in this field. Use decimals for partial hours.

Employee Type Select the type of time reporter to which to apply the condition. Valid values are ***Exception Hourly, Hourly, Salaried,*** or ***Not Applicable.*** (This field applies to both employees and nonemployees.)

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. Use decimals for partial hours.

Minutes Enter a number of minutes.

Number of Days Enter a number of days. This cannot exceed 14 for online rules processing.

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 ***Elapsed, In, Out, Meal, Break, Transfer.***

Punch Type List This field works in conjunction with the **Punch Type** field. 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, 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.

Time Period ID Select the appropriate time period. For online rules, do not select a period that exceeds 14 days.

TRC Select the TRC that the condition applies to.

TRC List If the condition applies to more than one TRC, select the TRC list that defines the set of TRCs. 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, and employee status lists, identify a predefined set of valid codes. You can define up to 15 different types of value lists.

View List The **View List** button is available only when the page contains an option for punch type list, shift list, TRC list, or use value list. Clicking it displays the contents of the selected list.

Result (Action)

Use the fields in this region to define the action for the system to take when the condition is met. 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. Use this template to compensate employees reporting elapsed time for perfect attendance.

Variable in If Clause	*Enter Value in this Field*
(3)SPECIFIED HOURS	Hours
(4)SPECIFIED TRC	Time Reporting Code

Note. The fields that appear in the Result (Action) region vary by template. All fields that can appear are described below and are listed in alphabetical order.

Accumulator Select the TRC to which to assign the accumulated results of other TRCs.

Doubletime TRC Select the time reporting code for double-time pay.

Exception ID Select the type of exception for the system to generate when the rule is executed. 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 TRC for overtime.

Quantity Enter the number of hours or units.

Rate Enter a monetary amount in this field.

Shift List Select the appropriate shift list. 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.

TRC Select the TRC.

View List 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 the template page to access other pages within this component.

Using Actions and Conditions to Create Rules

When you define actions and conditions in PeopleSoft Time and Labor, you define them independently of one another. This enables you to reuse the same actions or conditions in more than one rule, without having to define them over again. In addition, using actions and conditions does not require a complete mastery of SQL. The Actions and Conditions pages guide you through the steps required to create actions and conditions and automatically generate all the SQL needed to define your rules.

Creating rules from actions and conditions comprises the following tasks:

1. Defining general information for a SQL action.
2. Creating the text of the SQL action.
3. Copying an action.
4. Defining general information for a SQL condition.
5. Creating the text of the SQL condition.
6. Copying a condition.

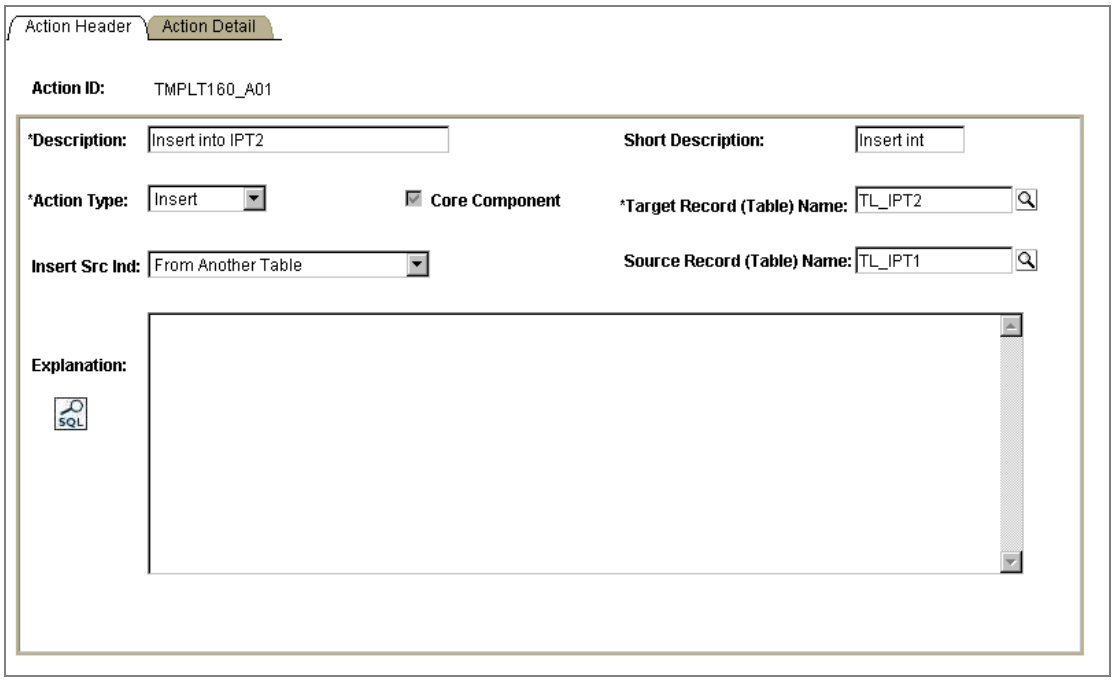
Pages Used to Create Rules With Actions and Conditions

Page Name	*Object Name*	*Navigation*	*Usage*
Action Header	TL_ACTION_PNL1	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Actions, Action Header	To define or view general information for a SQL action. Specify the action to perform (delete, insert or update), and identify the target record (table) to perform the action on. If action type is *insert* (from another table), specify the source record (table).
Action Detail page: Action Detail 1 tab	TL_ACTION_PNL2	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Actions, Action Detail	To create the text of your SQL action.
Action Detail page: Action Detail 2 tab	TL_ACTION_PNL2	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Actions, Action Detail	To create the text of your SQL action.

Page Name	Object Name	Navigation	Usage
Copy Actions	TL_TA_ACTN_CPY_CTL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy Action	To copy an action.
Define Condition Header	TL_CONDITION1_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Conditions, Define Condition Header	To define or view general information for a SQL condition.
Condition Detail	TL_CONDITION2_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Conditions, Define Condition Detail	To create the text of your SQL condition.
Copy Conditions	TL_TA_COND_CPY_CTL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy Conditions, Copy Condition	To copy a condition.

Defining and Viewing General Action Information

Access the Action Header page.



Action Header page

Some fields on the Action Header page always appear while others appear only in connection with the action type of ***Insert.*** The following elements always appear:

Action Type — Specify the SQL action to perform. Valid values are:

Update: Select to change an existing row of data. Identify a table to update in the **Target Record (Table) Name** field (defined below). In addition, define the type and source of the data to use to update the target record on the Action Details pages.

Delete: Select to delete the data in a table. Identify a table to delete in the **Target Record (Table) Name** field (defined below).

Insert: Select to insert a row of data into a table. 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). If your action type is ***Insert,*** further define the data 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 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. 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 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 appear 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** field, the **Source Record (Table) Name** field becomes available. Enter the source record from which you are taking data to perform the insert. Go to the Action Details pages to specify the source of the data 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. Enter the target record into which you are inserting the list of values. To define the exact values to insert in each field contained in this record, go to the Action Details pages.

Note. Click the links at the bottom of this page to access other pages in this component.

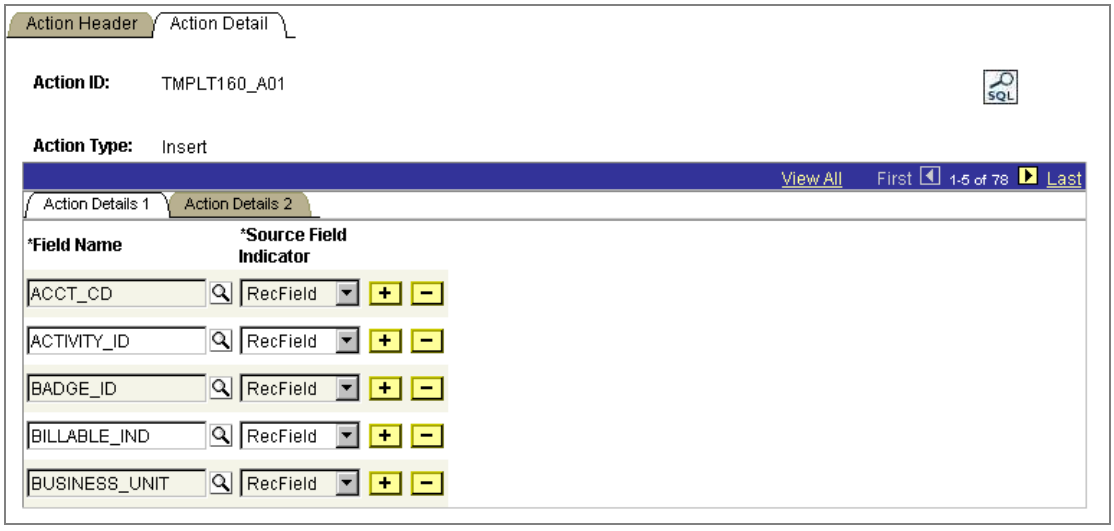
Creating Action Text

If the action type on the Action Header page is *Update* or *Insert,* 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? What are the sources (and types) of data that you are using to perform the insert or update? The specific information to enter depends on the type of action specified on the Action Header page and the value entered in the Insert Src Ind field.

There are two tabbed grids on which to enter action details: the Action Details 1 and Action Details 2 tabbed grids. These grids work in combination: when you select a value on the Action Details 1 grid, related fields become available on the Action Details 2 grid (as described below).

Note. The Action Detail page is not available if your action type is *Delete.* Because you are deleting the contents of an entire record (table), do not enter field-level information on the Action Detail page.

Access the Action Detail page: Action Details 1 tab.



Action Detail page: Action Details 1 tab

Field Name

- If your action type is ***Update:***

Use this field to identify the precise fields in the target record (table) to update. Define the type and source of the data to use to perform the update in the **Source Field Indicator** field (defined below).

- If your action type is ***Insert - From a List of Values:***

The **Field Name** column displays the fields belonging to the target record (table) 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** field is set to ***Constant.*** Enter the constant values 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

RuleTmplt

State Var

Note. ***RecField*** is not available when you are inserting from a list of values.

- If your action type is ***Insert - From Another Table:***

The **Field Name** column displays the fields belonging to the target record (table) 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.*** Enter the RecFields that are 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

- If your action type is ***Update:***

For each field in the target record (table) that you update, identify the type and source of the data 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. Enter the constants 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. 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 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. 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. Enter the state variable from any PeopleSoft Time and Labor state record to use as the source of the update.

- 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** field is set to ***Constant.*** Enter the constant values to use for the insert action in the **Constant** field on the Action Detail 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 t Action Detail 2 page becomes available. 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 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. Enter the state variable from any PeopleSoft Time and Labor state record that to use as the source of the insert.

Note. ***RecField*** is not available when you are inserting from a list of values.

- If your action type is ***Insert - From Another Table:***

By default, if you are inserting from another table, the **Source Field Indicator** field is set to ***RecField.*** Enter the RecFields that are the source of the insert in the **SRC (source) FieldName** column on the Action Detail 2 page. However, you can override the default and select one of the following other options:

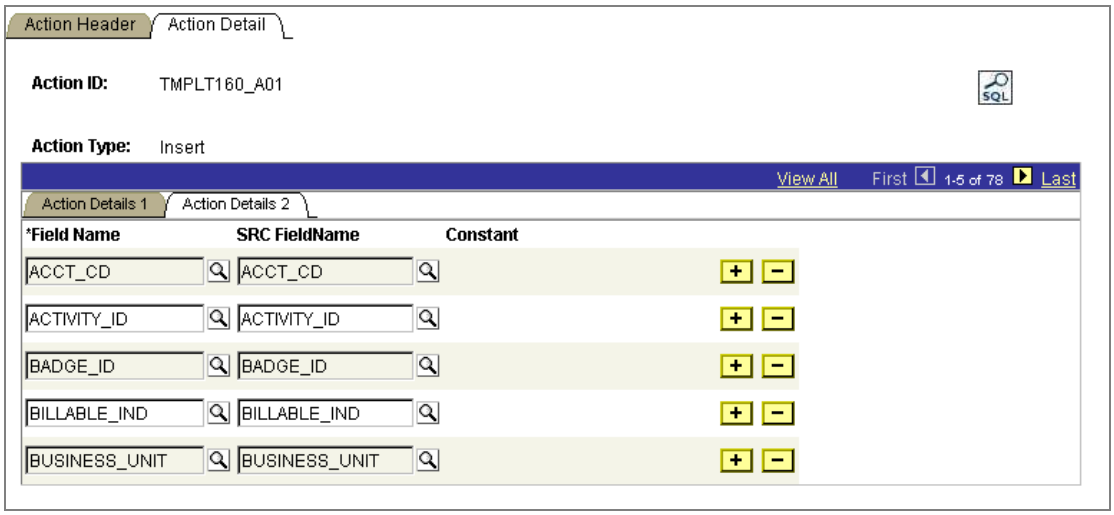
Constant: If your source field indicator is ***Constant,*** the **Constant** field on the Action Detail 2 page becomes available. Enter the constants to insert in the Target Record (Table) fields.

Expression Text: If your source field indicator is ***Expression,*** the **Expression Text** field on the Action Detail 2 page becomes available. 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 PBT_041501025114000000000000084916page becomes available. Enter the meta-SQL 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. Enter the state variable from any PeopleSoft Time and Labor state record to use as the source of the insert into the target record (table).

Action Detail page: Action Details 2 tab



Action Detail page: Action Details 2 tab

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 Detail 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 you action is ***Insert - From Another Table,*** this column displays the Target Record (Table) fields on which you are performing the insert.

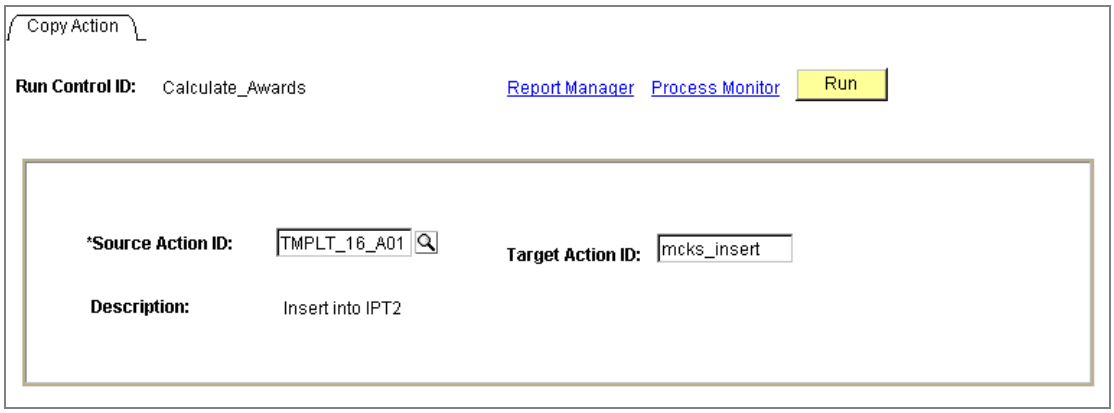
This page displays additional fields depending on the source field indicator selected on the Action Detail 1 page:

Source Field Indicator	*Element That Appears on the Action Details 2 Tab*	*Use*
Constant	**Constant**	Enter the constant to use for the update or insert.
Expression	 **(Expression Text** button)	Click on the **Expression Text** button to access the **Expression Text** field.

Source Field Indicator	*Element That Appears on the Action Details 2 Tab*	*Use*
Meta SQL	**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 to use for the insert or update action.
Rec Field (Record.Field) Note. ***Rec Field*** is only valid for the action types of ***Update*** and ***Insert - From Another Record***	**SRC FieldName** (Source FieldName)	• If your action type is ***Update,*** enter the fields in the source record (table) that contain the data to perform the update. **Note.** In the case of an update, the source record (table) is identical to the target record (table) identified on the Action Header page. • If your action type is ***Insert*** (***From Another Record***), 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.
State Var (state variable)	**State Variable**	Enter the state variable from any PeopleSoft Time and Labor state record to use as the source of the update or insert.

Copying Actions

Access the Copy Action page.



Copy Action page

Duplicate the action by changing the name. Then you can modify the action and combine it with other actions and conditions to form new rules.

Note. 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).

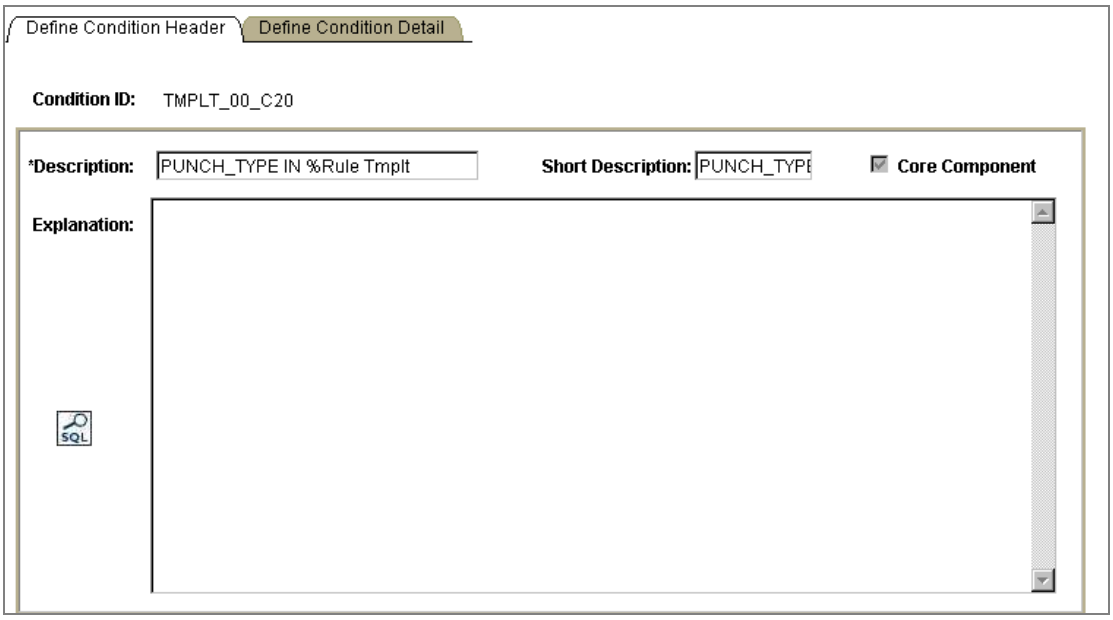
Source Action ID Select the action to copy. When you enter a value in this field, the system displays the appropriate **Short Description** for this action.

Target Action ID Enter a name for the new or duplicate action.

Note. After copying an action, use the Define Actions component (in correction mode) to modify the copy.

Defining and Viewing General Condition Information

Access the Define Condition Header page.



Define Condition Header page

Note. Template-built rules are not effective-dated, however they are associated with an effective-dated rule program.

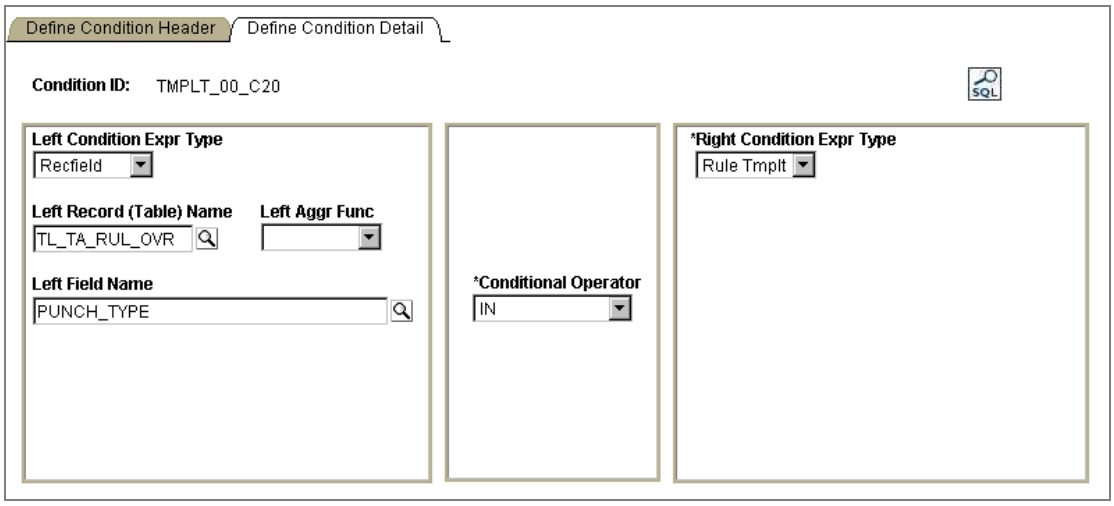
Core Component This field is display-only and system-maintained. Many SQL objects are delivered with PeopleSoft Time and Labor. These objects are used in templates. If the object you are viewing was created by PeopleSoft, the system selects this check box to signify that. If you created this object, 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.

You can click the links at the bottom of this page to access other pages within this component.

Creating SQL Condition Text

Access the Define Condition Detail page.



Define Condition Detail page

To define a condition on the Define Condition Detail page, specify the exact *relationship* that must occur between the different elements before an action occurs. The action occurs only if the defined relationship is true. For example, you could specify that an action occurs only if a field equals a certain value—for instance, you could decide that an action occurs 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 defined value. You'll specify the kinds of elements to compare (for example, a field value against a constant) in the **Left Condition Expr Type** (left condition expression type) and **Right Condition Expr Type** (right condition expression type) fields. You'll define the precise relationship to occur between these elements (before an action can occur) in the **Conditional Operator** field.

The Define Condition Detail page contains several fields that appear permanently, and others that display or hide depending on the left and right condition expression type. The following fields always appear:

Left Condition Expr Type (left condition expression type)

Use to specify the type of element to compare to the element in the **Right Condition Expr Type** field to define the condition. Establish the correct relationship between these elements using the **Conditional Operators** field. Valid values are:

Constant

Expression

Meta-SQL

RecField

State Var (state variable)

Right Condition Expr Type (right condition expression type)
Use to specify the type of element to compare to the element in the **Left Condition Expr Type** field to define the condition. Establish the correct relationship between these elements using the **Conditional Operators** field. Valid values are: ***Constant, Expression, Meta-SQL, RecField,*** and ***State Var*** (state variable).

Conditional Operator
This field always appears—regardless of the left or right expression condition type. Use the conditional operator 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 in the **Left Condition Expr Type** and **Right Condition Expr Type** fields, the following additional fields appear:

Left or Right Expression Type	*Additional Fields*
Constant	The **Left Constant** or **Right Constant** field appears. Enter a constant to define your condition.
Expression	The **Left Condition Expr Type** (left condition expression type) or **Right Condition Expr Type** (right condition expression type) field appears. Enter an expression to define your condition. The expression text can be of any length.
Meta SQL	The **Left Meta SQL** or **Right Meta SQL** field appears. Enter the appropriate meta-SQL to define your condition.
RecField	If your left or right condition expression type is ***RecField,*** the following fields appear:
	• **Left Record (Table) Name** or **Right Record (Table) Name.** Enter the left or right record that you will use to define your condition.
	• **Left Aggr Func** (left aggregate function) or **Right Aggr Func** (right aggregate function). The valid values for this field are: ***Avg*** (average) ***Count*** ***Count (*)*** ***Max*** (maximum) ***Min*** (minimum) ***Sum***

Left or Right Expression Type	*Additional Fields*
	• **Left Field Name** or **Right Field Name.** Enter the name of the field belonging to the left or right record (table) name.
State Var	The **State Variable** field appears. Enter the state variable to use to define your condition.

Copying Conditions

First, duplicate the condition. Then rename and modify the condition. Once this is done, combine the condition with other actions and conditions to form new rules.

Note. 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).

Access the Copy Condition page.



Copy Condition page

Source Condition ID Select the condition 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.

Creating SQL Objects

SQL objects are the most complex PeopleSoft Time and Labor rule objects that PeopleSoft delivers. Use them to define rules that are more complicated than those that can be accommodated by templates or actions and conditions.

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, use an expression text box within the SQL object pages to enter and format your SQL statements. If you are uncomfortable writing free-form SQL, the SQL object pages provide guidance for each aspect of an action and condition.

If you are creating a SQL statement, modify a PeopleSoft-delivered object using the Copy SQL Object page to create and modify a copy. Or, use the SQL Object component 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.

Defining SQL Objects

For any SQL object you create, designate a name, several descriptions, and the type of object you are building. Although there are eight pages in this component, you see a maximum of five. The visible pages depend on the type of SQL object you are building. Here are some questions 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?
- The 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)
```

Setup Tasks

Creating SQL objects comprises the following tasks:

1. Selecting the type of action and creating descriptions of the SQL statement.
2. Creating free-from SQL text.
3. Entering values in the record field of a particular table.
4. Defining meta-SQL parameters.
5. Creating expression text.
6. Updating a record field.
7. Designating which tables you will use in this SQL object.
8. Creating expression text for tables.
9. Joining tables.
10. Creating the first clause of a Select statement.
11. Creating expression text for the first clause of a Select statement.
12. Creating the Where clause of your SQL statement.
13. Creating expression text for the Where clause of a SQL statement.
14. Copying a SQL object.

SQL Object Component

The SQL Object component changes according to the type of SQL statement you are building. Use the following table to determine which pages are visible for each type of SQL statement.

Statement Type	*SQL Object*	*Tables*	*Automatic Joins*	*Select Fields*	*Where Exp.*	*Exp. Text*	*Insert Fields*	*Update Fields*
Delete	X				X			
Expression	X					X		
Insert	X						X	
Select	X	X	X	X	X			
Update	X				X			X

Pages Used to Create SQL Objects

Page Name	*Object Name*	*Navigation*	*Usage*
SQL Object	TL_SQL_OBJECT_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, SQL Object	To select the type of action and create descriptions of the SQL statement you are creating.
Expression Text	TL_SQL_EXPRESS_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects	To enter free-form SQL text.
Insert Fields	TL_SQL_INSERT_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects	To enter values in the record field of a particular table.
TL SQL Insert SecPNL	TL_SQL_INSMSQL_SEC	Click Meta-SQL button on the Insert Fields page.	To enter meta-SQL parameters.
Expression Text Sec Panel	TL_SQL_OBJ_SECPNL4	Click the Expression Text button on the Insert Fields page.	To enter expression text.
Update Fields	TL_SQL_UPDATE	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, SQL Objects	To update a record field.
Tables	TL_SQL_OBJECT_TABLES	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, Tables	To designate which tables you will use in this SQL object.

Page Name	*Object Name*	*Navigation*	*Usage*
Expression Text	TL_EXPRESN_SEC	Click the Expression Text button on the Tables page.	To enter expression text for tables.
Automatic Joins	TL_SQL_JOINS_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects	To join tables.
Select Fields	TL_SQL_SELECT_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects	To create the first clause of a Select statement.
Expression Text	TL_SQL_OBJ_SECPNL1	Click the Expression Text button on the Select Tables page.	To enter expression text for the first clause of a Select statement.
Where Expressions	TL_SQL_WHERE_PNL	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, SQL Objects, Where Clause	To create the Where clause of your SQL statement.
SQL Bind Mapping	TL_SQL_BINDS_PNL	Click the Left/Right Bind button on the Where Expressions page.	To enter expression text for the Where clause of a SQL statement.
Copy SQL Objects	TL_TA_COPY_CTL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Copy SQL Objects	To copy a SQL object.

Selecting Action Types and Creating SQL Descriptions

Access the SQL Objects page.



SQL Object page

Note. SQL objects are not effective-dated, but are associated with rules that are included in effective-dated rule programs.

SQL Type

Select the SQL action that this SQL object should perform. Valid options are:

Delete: Use 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 to enter a free-form SQL expression text. If you select this option, the component displays only the SQL Object and Expression Text pages.

Insert: Use to create an Insert statement. If you select this option, the component displays only the SQL Object and Insert Fields pages.

Select: Use to create a Select statement. You use a Select statement to query. If you select this option, the component displays the SQL Object, Tables, Automatic Joins, Select Fields, and Where Expressions pages. Also, the **Select Type** field appears.

Update: Use 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 appears if you chose ***Select*** in the **SQL Type** field. Select the type of action to use. Valid options are: ***State, Subquery, w/Insert.***

State: Use to select fields into a state record. A state variable is from the AE State records. Use to retrieve an exception description that will be used in multiple locations within your AE program. 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 to use the Select statement you are creating as a subquery in another query.

A subquery must 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.

Use a SQL insert to insert a list of values into a table. Select ***w/Insert*** 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 on the Working Tables page.

Core Component This field is display-only and system-maintained. Several SQL objects are delivered with PeopleSoft Time and Labor. 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.

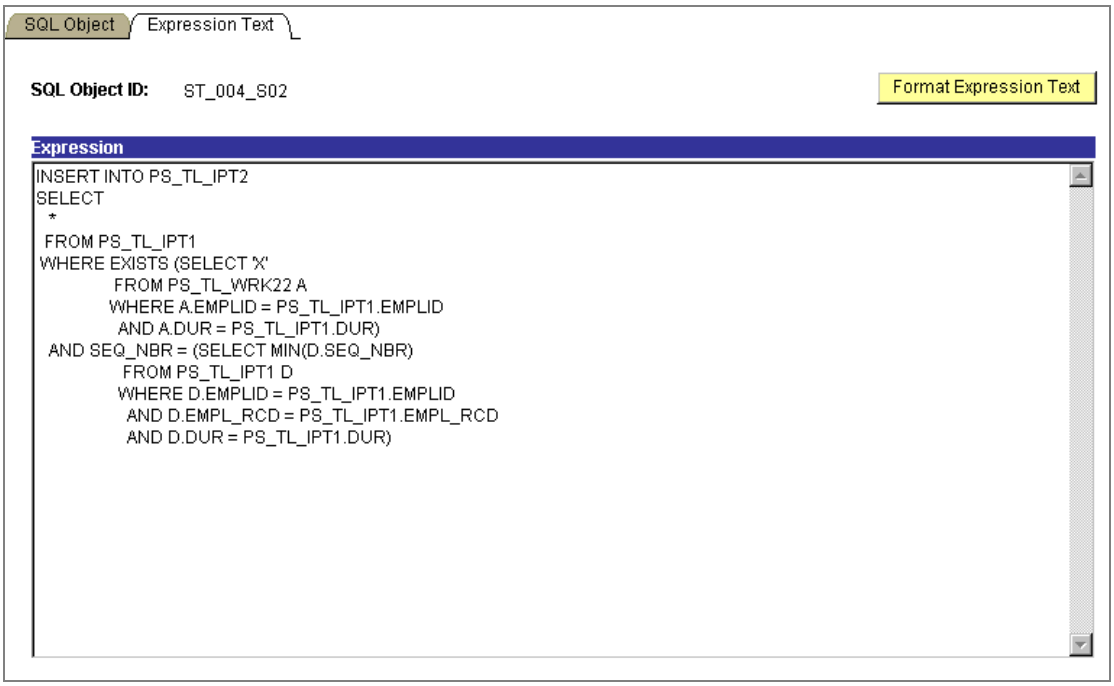
Click the links at the bottom of this page to access other pages within this component.

See Also

Adding Rules to a Rule Program

Entering Free-Form SQL Text

Access the Expression Text page.



Expression Text page

Format Expression Text Click to format the SQL text in the **Expression** field. You must enter your statement before clicking the button.

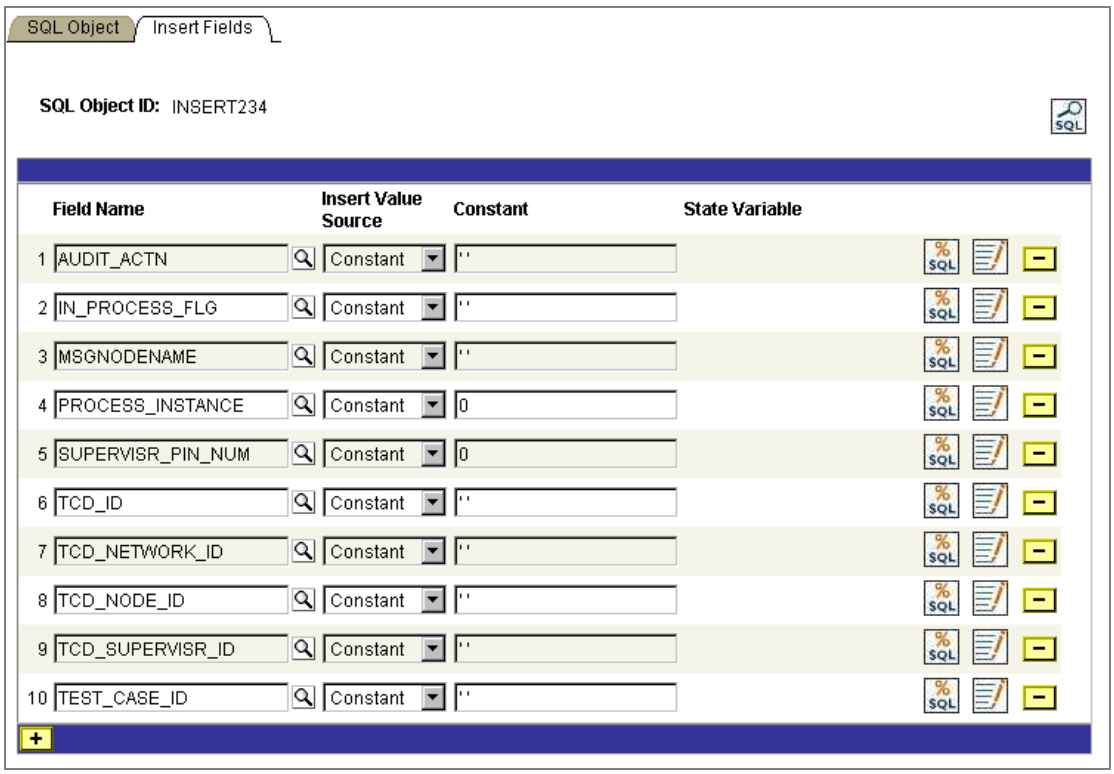
Expression This field is an expression text box in which to type SQL statements. You can also paste text from other applications. The system stores anything you enter and does not check for errors. Before entering your statement and saving the page, run your SQL statements through an interactive SQL tool.

See Also

Rule Step Creation Guidelines

Entering Values in the Record-Field of a Table

Access the Insert Fields page.



Insert Fields page

Complete both the SQL Object and Insert Fields pages to create a complete Insert statement.

Field Name Select the column in which you want to enter the value.

Insert Value Source Select the source of the value. Valid values are: ***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. Enter a constant in this field.

State Variable Enter the variable to use. This field is available if you selected ***Variable*** in the **Insert Value Source** field.

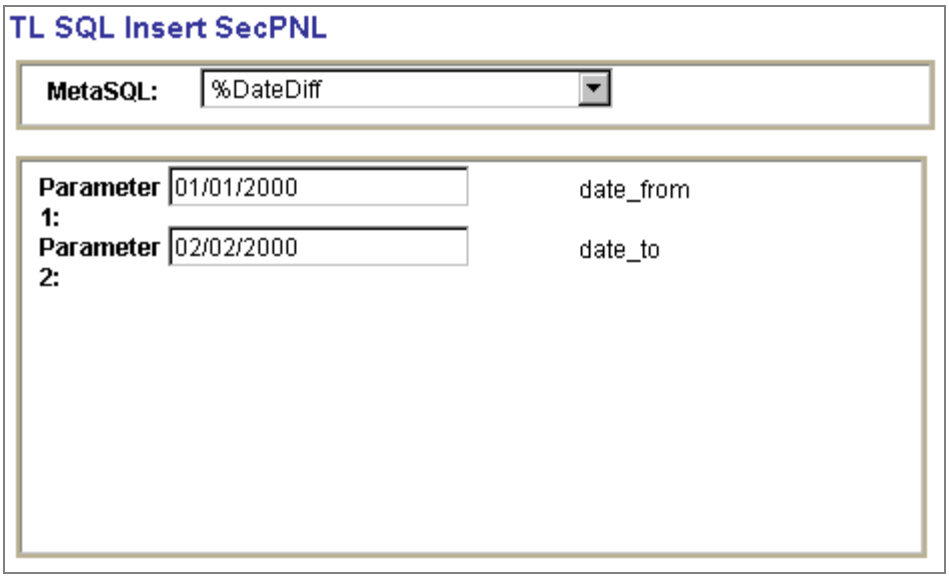
Click to select a meta-SQL option. The TL SQL Insert SecPNL page appears.

Click to enter expression text. The Expression Text Sec Panel appears.

Click the links at the bottom of this page to access other pages within this component.

Entering Meta-SQL Parameters

Access the TL SQL Insert SecPNL page.



TL SQL Insert SecPNL page

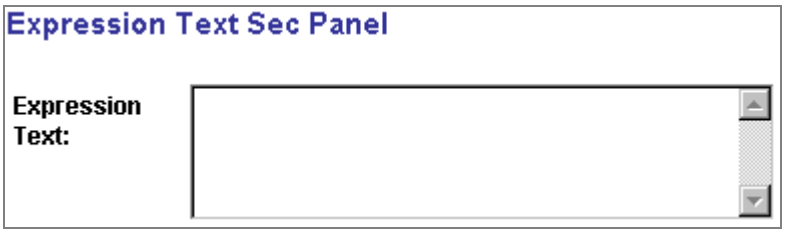
MetaSQL Select the meta-SQL variable to include in your Insert statement.

Parameter *(X)* **Note.** *(X)* represents the number of the **Parameter *(X)*** field. The system assigns successive numbers to each Parameter field that appears.

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, enter the two dates between which system should calculate the difference.

Entering Expression Text for Record-Fields

Access the Expression Text Sec Panel page



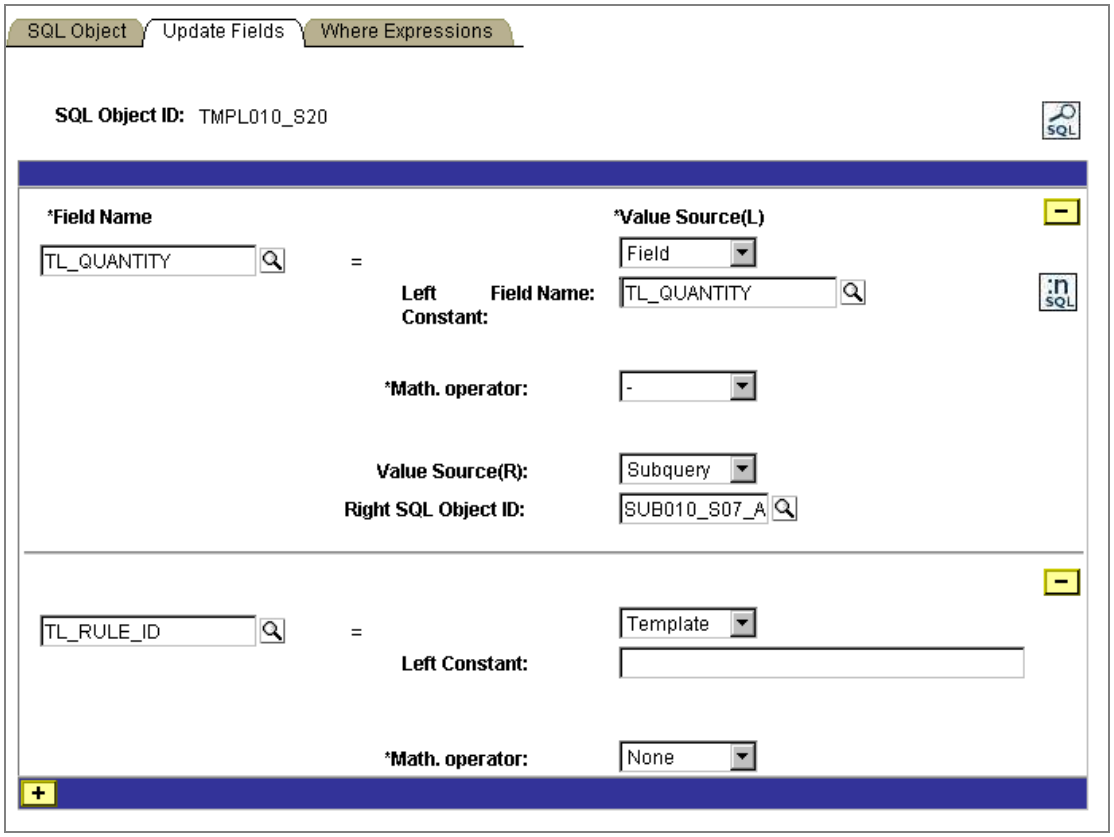
Expression Text Sec panel

Enter expression text in the box provided.

Updating a Record-Field

Access the Update Fields page. 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

Field Name — Select the record field to update. The result of your subquery or math operation will be placed in the specified field.

Value Source(L) — Select the source of the value to act upon. Valid options are: ***Constant, Field, Meta-SQL, Subquery, Template, Variable.***

Field Name — Select the record field on which you want to base your calculation.

Math. Operator — To perform a mathematical function, select the operator. If you do not wish to perform any mathematical functions, select ***(none).*** Valid options are: **-, +, *, /.**

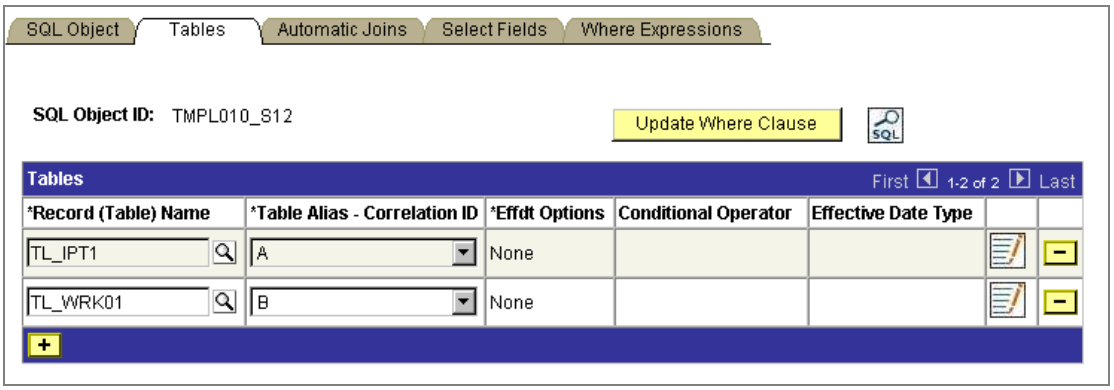
Value Source(R) — Select the source of the value you want to act upon. Valid options are: ***Constant, Field, Meta-SQL, Subquery, Template, Variable.***

Right SQL Object ID — This field is used to add a subquery to a Set clause.

Designating Tables in a SQL Object

Access the Tables page. In our example, TL_IPT1 is assigned an alias of *A* and TL_WRK01 is assigned an alias of *B*. The clause covered by this page is:

```
FROM PS_TL_IPT1 A
   , PS_TL_WRK01 B
```



Tables page

Update Where Clause — Click to update the Where clause of your SQL statement. The system automatically generates a SQL Where clause based on the effective date option.

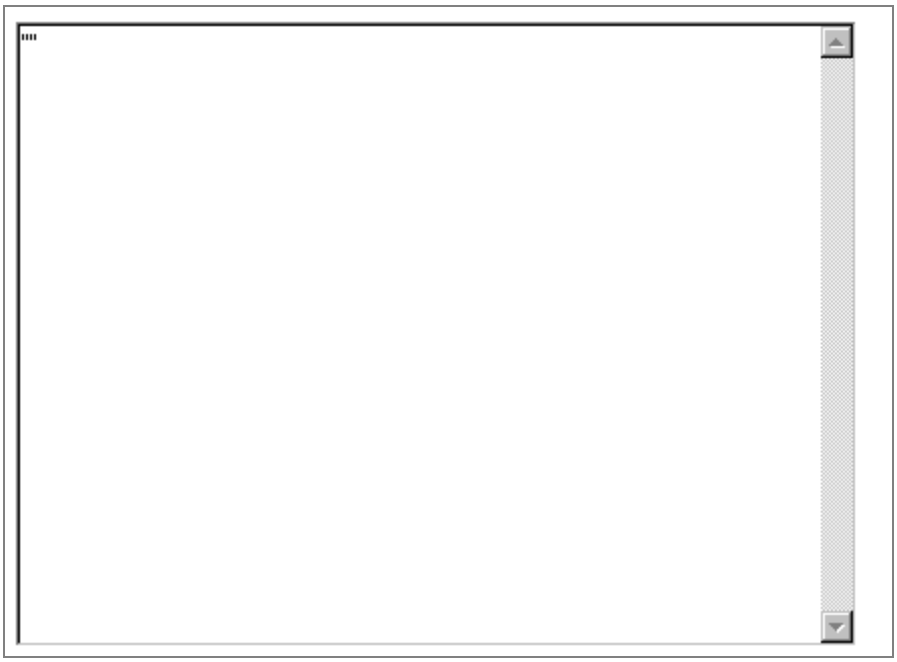
Tables

Record (Table) Name	Select the name of the table 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 available 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 are: ***First, Join, Last, None.***
	First: Select this value to select the first effective-dated row.
	Join: Select this value for the system to select the current dated row for this table.
	Last: Select this value to select the last effective-dated row, even if that date is in the future.
	None: Select this value for the system to not use any effective date logic in the query.
Conditional Operator	This field is available 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 to enter expression text. The Expression Text Secondary page appears.

You can click the links at the bottom of this page to access other pages within this component.

Entering Expression Text for Tables

Access the Expression Text page.

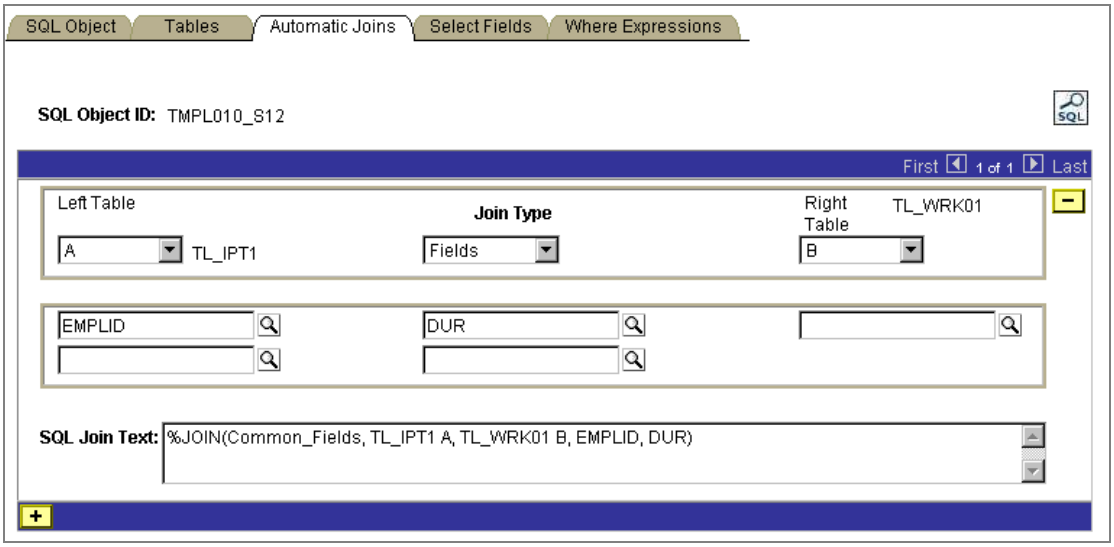


Expression Text page

Enter expression text in the box provided.

Joining Tables

Access the Automatic Joins page.



Automatic Joins page

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 three-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 three-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:

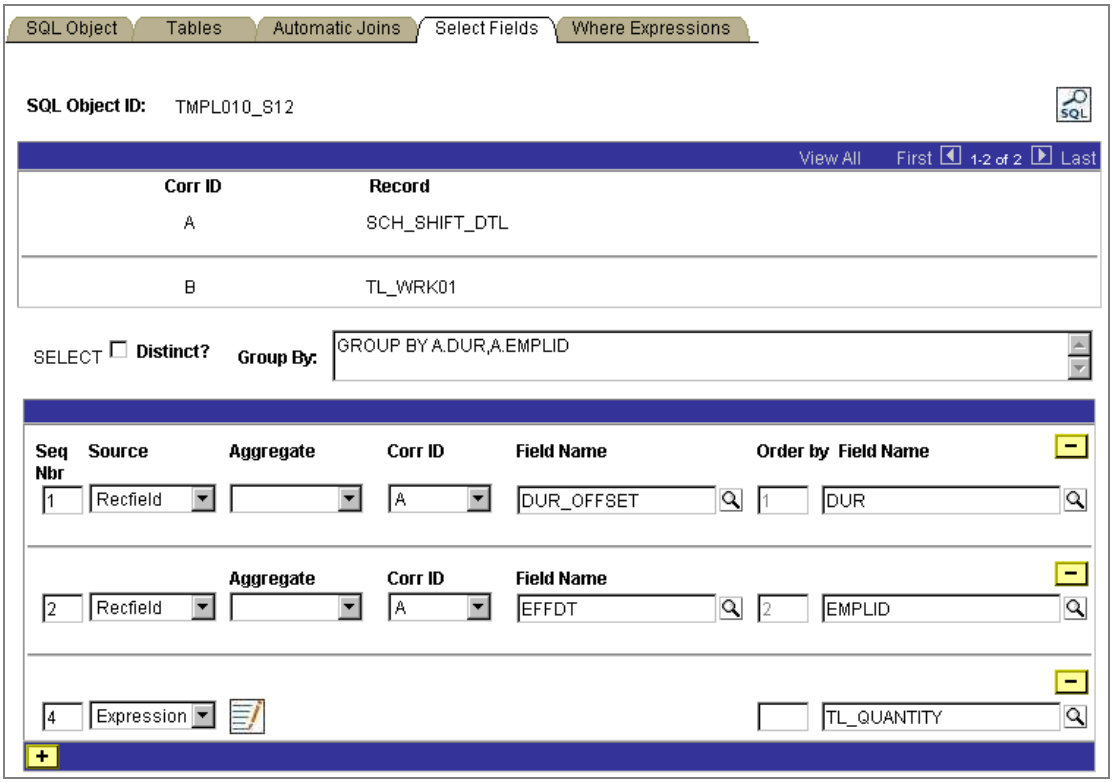
```
WHERE A.EMPLID = B.EMPLID
   AND A.DUR = B.DUR
```

Left Table	Select (by alias) the first table in your join. Valid options are: ***(none), A, B, C, D, E, F, G, H, I, J.***
Join Type	You can join in various ways. Valid options are: ***Fields, Key Fields.***
	Select ***Fields*** to select any record fields in the five drop-down list boxes that appear.
	Select ***Key Fields*** to 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 are: ***(none), A, B, C, D, E, F, G, H, I, J.***
SQL Join Text	This field displays the text of your join. The system uses the meta-SQL construct %JOIN.

Click the links at the bottom of this page to access other pages within this component.

Creating the First Clause of a Select Statement

Access the Select Fields page.



Select Fields page

All the options that you would include in the text of the statement are available 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
```

Corr ID (correlation ID)
The system displays the correlation ID you selected for reference while creating your Logical Operator/Where clause.

Record
The system displays the record you selected for reference while creating your Logical Operator/Where clause.

Distinct?
Select 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.

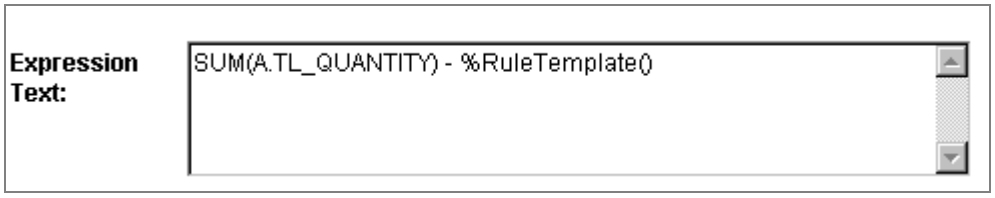
Group By
This value is automatically generated when there is an aggregate function.

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 to include in this statement. The value in the **Source** field determines which other fields are visible. Valid options are: ***Constant:*** Select this value to specify a constant. The **Order by** and **Field Name** fields appear on the page. ***Expression:*** Select this value to enter expression text. The flashlight button appears. ***Recfield:*** Select this value to specify a record field. ***Statevar:*** Select this value to specify a state variable. ***Template:*** Select this value to specify a template.
Aggregate	To perform an aggregate function, select that option here. Valid options are: ***(none), AVG, COUNT, COUNT(*), MAX, MIN, SUM.***
Corr ID (correlation ID)	Select the alias of the table to specify for this sequence number.
Field Name	Select the column from which to select.
Order by	The system generates this value.
Field Name	Select the column from which to select.

You can click the links at the bottom of this page to access other pages within this component.

Entering Expression Text for the First Clause of a Select Statement

Access the Expression Text page.

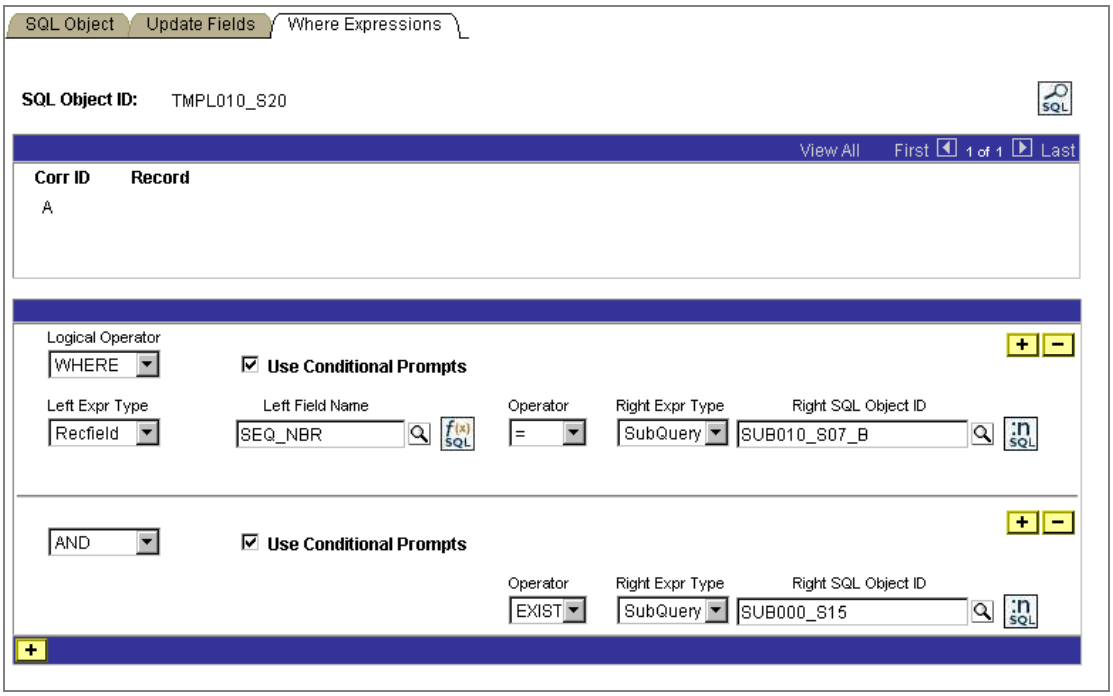


Expression Text page

Enter up to 254 characters in this expression text box.

Creating the Where Clause of a SQL Statement

Access the Where Expressions page.



Where Expressions page

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()
```

The system displays the record and correlation ID you have selected for reference while creating your Logical Operator/Where clause.

Logical Operator — Select an operator in this field. Valid values are: ***(none), AND, HAVING, NONE, OR, WHERE.***

Use Conditional Prompts — Select 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 holds 254 characters. Only a small SQL expression or subquery can be entered into this field.

Left Expr Type (left expression text) — Valid values are: ***(none), Binding, Constant, Meta-SQL, Recfield, SubQuery, Template, Variable.***

If you select ***Meta-SQL,*** the %SQL button appears on the page.

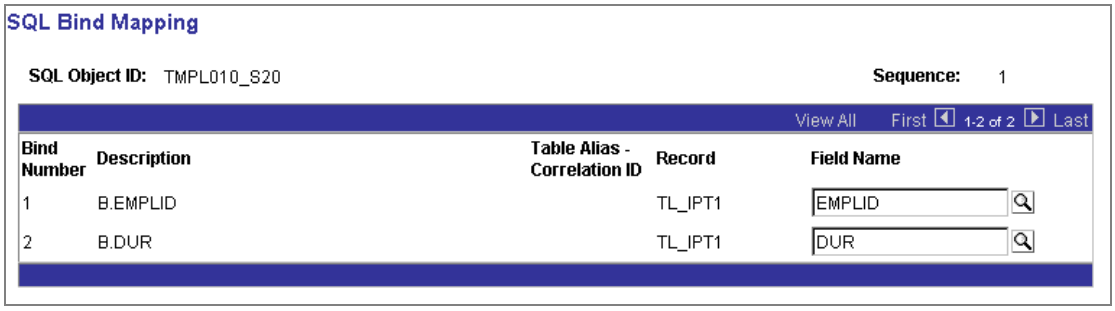
Corr ID (correlation ID) — Select the alias of the table to use. This field appears only when Recfield is selected for the left expression type.

Left Field Name — Select a column name of the table to use for the left expression.

	If you select ***Recfield,*** the function button appears. Click the function button to see a list of aggregate functions. Valid values are: ***NONE, MIN, MAX, AVG, SUM, COUNT, COUNT(*).***
Operator	Enter an operator. Valid values are: ***(none), <, <=, <>, =, >, >=, EXISTS, IN, NOT EXIST, NOT IN.***
Right Expr Type (expression type)	Enter a right expression type. Valid values are: ***(none), Binding, Constant, Meta-SQL, Recfield, SubQuery, Template, Variable.***
Corr ID (correlation ID)	Select the alias of the table to use. This field appears only when ***Recfield*** is selected for the right expression type.
Right Field Name	Select a column name of the table 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.

Entering Expression Text for the Where Clause of a SQL Statement

Access the SQL Bind Mapping page.



SQL Bind Mapping page

You must use the %Bind option in some situations. For example, 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)
```

Copying SQL Objects

Use the Copy SQL Objects function to copy an existing SQL object.

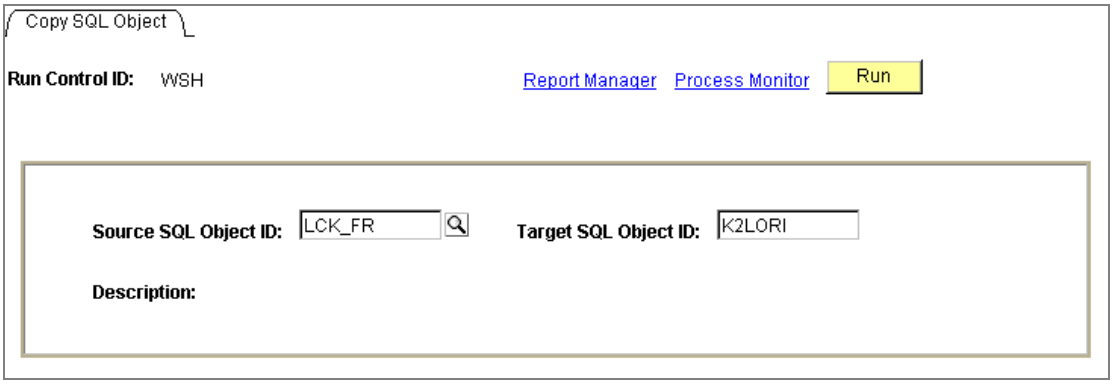
To copy a SQL object:

1. Duplicate a SQL object by giving it a different name.
2. Modify the new SQL object.

   The copy function is similar to a Save As command and occurs when saving the page.

Note. You cannot modify SQL objects after they are part of a rule and the system is in production (that is, once *Production Environment* is selected on the Installation Options page.

Access the Copy SQL Object page.



Copy SQL Object page

Source SQL Object ID Select the object 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 copying the 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 built.

User Exits

User exits are an optional feature that can add PeopleCode and AE sections to regular PeopleSoft Time and Labor processing. When you write user exits, add AE sections to the AE program TL_TA_RULES. Use all the AE constructs supported by PeopleTools (SQL, PeopleCode, looping constructs like Do When, Do While, and so on).

Note. If you create AE sections, they must have eight-character names. This is a PeopleSoft Application Engine requirement.

Important! Have adequate Application Engine and PeopleCode training before creating AE sections.

See Also

PeopleTools PeopleBook: Application Engine

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 tracks punch-related attendance infractions. You do not have to create Time Administration rules to track attendance, which would be extremely cumbersome. This is a PeopleSoft-delivered set of rules to use if your business requires attendance tracking.

Attendance tracking prevents a time reporter from taking advantage of rounding rules. For example, suppose your organization rounds clock punches to the nearest quarter hour. If a time reporter clocks in late and clocks 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, and attendance settings. Attendance infractions include tardiness, long lunches, early outs, and long breaks. The tracking can occur by three methods: fixed period, rolling period, and step period. The purpose for tracking punch-related infractions is to report user-defined recommended actions to be taken when tracking 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. Attendance processing occurs after IPT tables are loaded, but before rule are run.

A point system weights 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 the 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 the business rules or union regulations change. Although the system is delivered with standard actions, you can also create custom actions.

Attendance tracking allows you to define the attendance characteristics and to maintain the changes. When setting up, specify the following: tracking method, period ID, tracking items (tardies, long lunches, early outs, and long breaks), and points associated with each tracking item. Define the recommended actions and threshold of each action. You can choose a

recommended action from a predefined list of actions or create custom action. If you choose to create custom actions, choose *Other* and enter your comments to describe the action.

See Also

Understanding Batch Processing in Time Administration

Tracking Methods

You can choose from three tracking method types: fixed period, rolling period, and step period. The following table 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	A rolling period is based on the current date and the period of interest. Define a rolling period by specifying the length of days for the 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 tracks attendance from 4/16/00. It compiles 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 uses data from 4/17/00 to the present date. It ignores 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 that 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 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 Tasks

Defining attendance programs and tracking attendance violations comprises the following tasks:

1. Specifying infractions to track, grace periods to allow, and the severity of each infraction.
2. Specifying which actions and when actions occur when infractions are committed.
3. Adding attendance programs to a rule program on the Program page.

> **Note.** You must link your attendance programs to rule programs, and then associate both to workgroups.

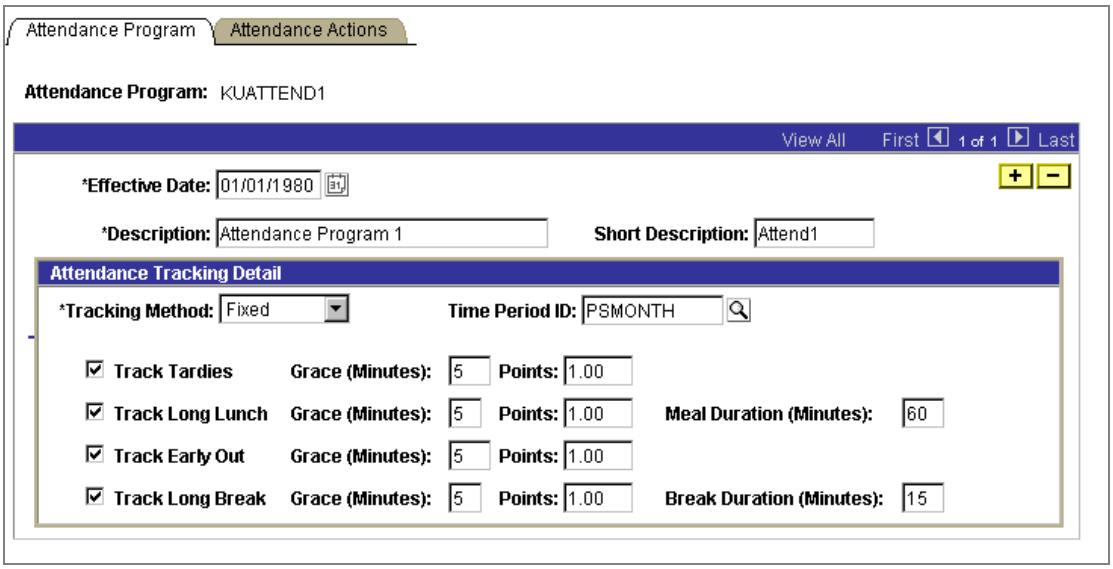
4. Viewing, by employee ID, the action thresholds that a time reporter has crossed.
5. Viewing a time reporter's violation history.

Pages Used to Define Attendance Programs

Page Name	*Object Name*	*Navigation*	*Usage*
Attendance Program	TL_ATTEND_PGM_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Attendance Programs	To specify infractions to track, grace periods to allow, and the severity of each infraction.
Attendance Actions	TL_ATTEND_ACT_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup 1, Define Attendance Programs, Attendance Actions	To specify which actions and when actions occur when infractions are committed.
Recommended Actions	TL_ATTENDANCE_PNL	Go, Define Business Rules, Define Time and Labor Rules, Inquire, View Attendance Actions	To view, by employee ID, the action thresholds that a time reporter has crossed.
Attendance History	TL_ATTEND_HIST_PNL	Go, Define Business Rules, Define Time and Labor Rules, Inquire, View Attendance History	To view a time reporter's violation history.

Specifying Attendance Infractions

Access the Attendance Program page.



Attendance Program page

Attendance Tracking Detail

Use this group box to specify the particular rules and limits of your attendance program.

Tracking Method Select the type of time period to use for this attendance program. Valid values are: ***Fixed, Rolling, Step.*** If you select ***Fixed*** or ***Rolling,*** the **Time Period ID** field appears. If you select ***Step,*** the **Time Period ID** field will be unavailable.

Time Period ID Select the time period ID that applies to your attendance program. You can select a period delivered by PeopleSoft or a custom one. This field does not apply if you are creating a step-based attendance program.

For Fixed Period attendance programs, you can select from day, week or month type periods only. For day type periods, the offset can only be 1. For rolling period attendance programs, you can only choose a day type time period that has an offset of less than or greater than 1.

Track Tardies Select 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 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 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 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.

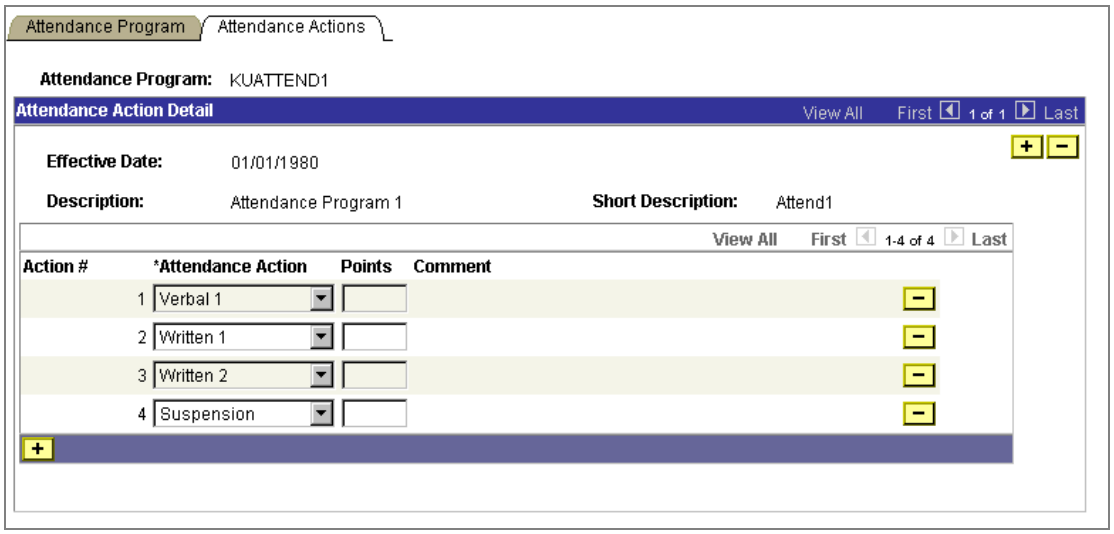
Break Duration Enter a maximum duration for a break.

See Also

"Setting Up Basic Tables"

Specifying Attendance Infraction Actions

Access the Attendance Actions page.



Attendance Actions page

Action # (action number) The system populates this column with the next consecutive sequence number. Although the numbers are automatic, enter actions in any order. Lower-numbered items will occur first, so 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 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 are: ***Letter, Other, Suspension, Terminate, Verbal 1, Written 1, Written 2, Written 3.***

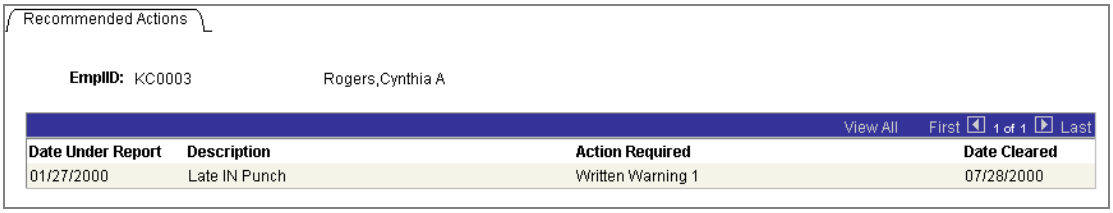
Letters are placed on file without the employee's knowledge. Written warnings are signed by the employee and manager as an acknowledgement that the employee has been notified of the infraction. You can write an API to send a message when an action occurs, but the system only identifies infractions and 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 invokes 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 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 available only if you selected ***Other*** in the **Attendance Action** field. Enter a description of, or comment about, the action. You can create custom actions. For example, you might dock a time reporter's pay. This is a 30-character alphanumeric field.

Viewing Action Thresholds

Access the Recommended Actions page.



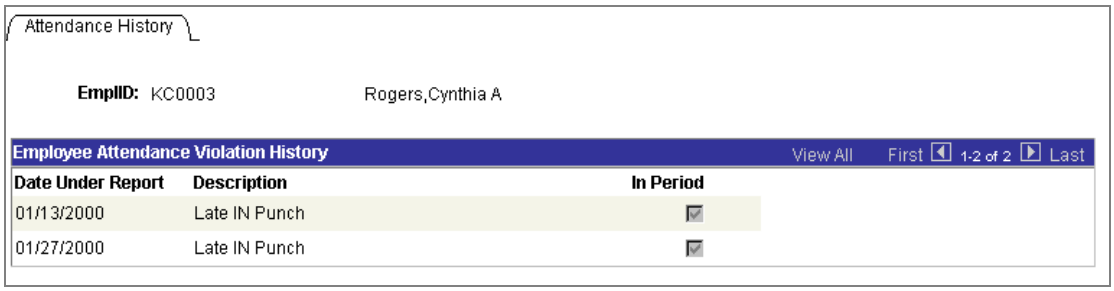
Recommended Actions page

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.

Viewing Attendance Violation History

Access the Attendance History page.



Attendance History 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 Rules

Once you have defined the individual building blocks that make up a rule using actions and conditions or SQL objects, you need to combine these components into complete rules and place them in a logical order by arranging them into *rule steps* using the pages described in this section.

You'll also use these pages to modify existing rules or copies of rules. For example, you can take an existing rule (whether template built or of another type), open it within the Define Rules component, modify or add new actions or conditions to it, and then recompile the rule.

Rule Assembly Tasks

Assembling rules comprises the following tasks:

1. Entering basic information about a rule.
2. Defining the steps of the rule.

3. Creating descriptions for each rule step.
4. Viewing the SQL text of the rule step you are adding to a rule.
5. Copying rules.

Pages Used to Assemble Rules

Page Name	*Object Name*	*Navigation*	*Usage*
Define Rule Header	TL_RULE_PNL1	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Define Rules	To enter basic information about a rule.
Define Rule Steps	TL_RULE_PNL2	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Define Rules, Rule Step Details	• To define the steps of the rule. • To enter descriptions for each rule step.
Rule SQL Text Resolution	TL_RULE_TEXT_SP	Click the Rule SQL Text button on the Define Rule Steps page.	To view the SQL text of the rule step you are adding to a rule.
Copy Rules	TL_RULE_COPY	Go, Define Business Rules, Define Time And Labor Rules, Setup 1, Copy Rules	To create a rule that is similar to an existing rule or a PeopleSoft-delivered rule object.

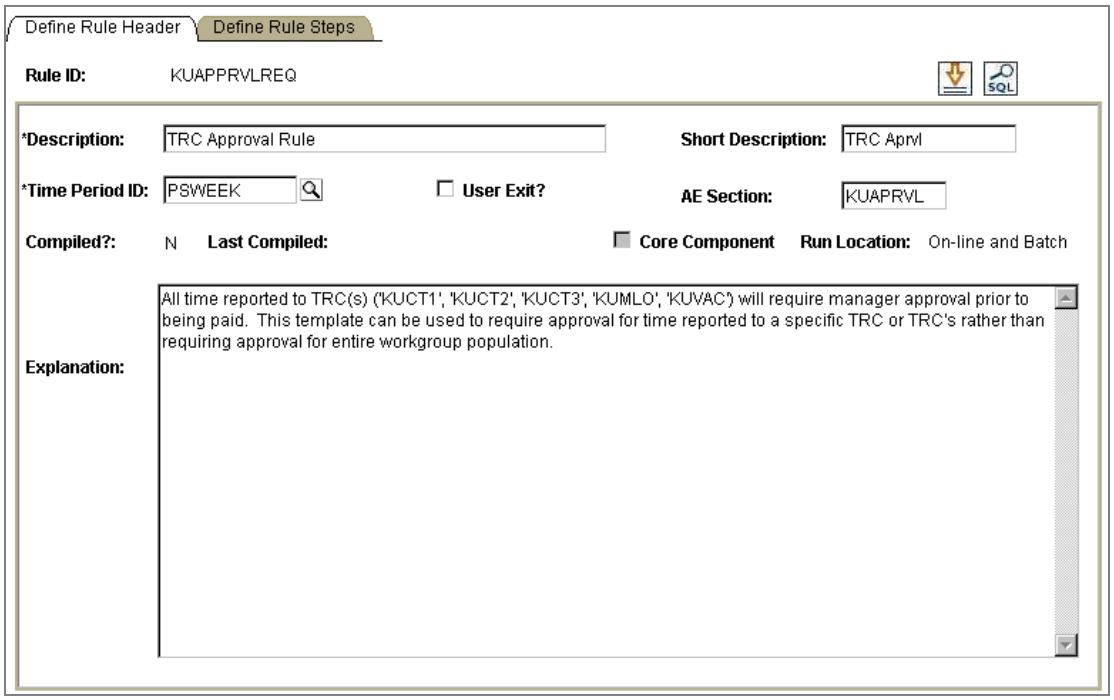
Standard Field Definitions for the Define Rules Component



Click the **Compile Rule** button to compile the SQL of your rule. The compile inserts the section and steps into the AE program/library.

Entering Basic Information About a Rule

Access the Define Rule Header page.



Define Rule Header 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.

User Exit

Select if the components of the rule are written in PeopleSoft Application Engine or in PeopleCode. If you select this option, the **Compiled** and **Last Compiled** fields are unavailable and the Define Rule Steps page is unavailable. The system locates the created section in the TL_TA_RULES library.

Create a user exit by creating a new AE section within the TL_TA_RULES library. Also, add the AE section name to the AE section list on AE Section page.

AE Section (application engine section)

Select the AE section to use to process this rule. This section is inserted into TL_TA_RULES library when you compile the rule.

Note. Do not modify PeopleSoft Time and Labor objects in the AE library. Use the Time and Labor pages.

Compiled?	The system autopopulates this field to signifies whether the rule has been compiled. Valid values are: ***N*** (no): The rule has changed since the last compilation. ***Y*** (yes): The rule has been compiled and hasn't been changed since.
Last Compiled	This system-maintained field displays the last date and time that this rule was compiled.
Core Component	This field is display-only and is system-maintained. Many rules are 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. If you created this object, the system sets this field to ***N.*** When you add a new rule, the system sets the Core Component field to ***N.***
Run Location	You can update this field only if you have activated the Run On-line Rules option on the TL Installation page. Valid values are: ***Batch Only:*** Select for the system to apply this rule when you run the Time Administration batch process. ***Online and Batch:*** Select for the system to apply this rule when you run the Time Administration batch process or the Apply Online Rules process that you start from the Weekly Elapsed Time page or the Weekly Punch Time page.
Explanation	Enter a detailed description of your rule. You can include examples of how this rule is used and how it affects data in different scenarios.

See Also

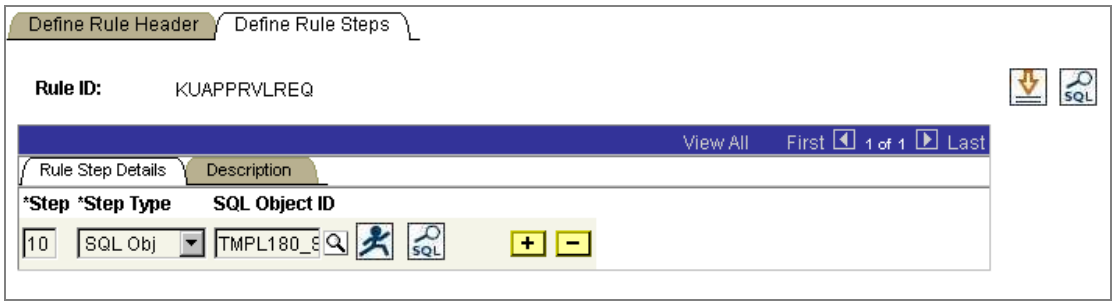
Understanding Batch Processing in Time Administration

"Setting Up Basic Tables", Establishing Time Periods

"Setting Up Basic Tables", Building and Viewing Calendars

Defining Rule Steps

Access the Define Rule steps page: Rule Step Details tab.



Define Rule Steps page: Rule Step Details tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

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.

Warning! Never truncate TL_IPT1. Doing so destroys your data.

Generally, order your rules by period. For example, if you have daily rules and weekly rules, the system should resolve the daily rules first.

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Rule Step Details Tab

Use this grid to enter the steps of your rule.

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. 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 are:

(none) Select for the system not to use any effective date logic.

SQL Obj: Select to add a SQL object in this rule step. If you select this option, the Record (Table) Name column becomes unavailable.

Action: Select to add an action in this rule step. If you select this option, the Record (Table) Name column becomes unavailable.

Expr Text: Select 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 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 become unavailable.

SQL Object ID Select the object to include in this rule step.

Action Select the action to include in this rule step.



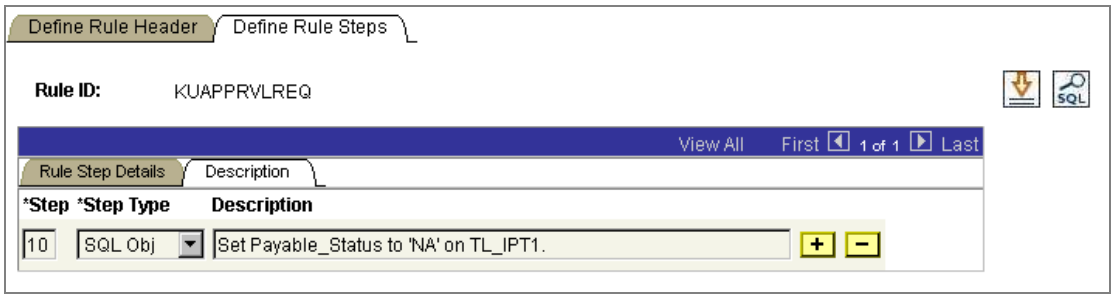
Click to view the details of the SQL object that you are adding to the rule step. You cannot modify the object.



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 the 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.

Description Tab



Define Rule Steps page: Description tab

Note. 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.

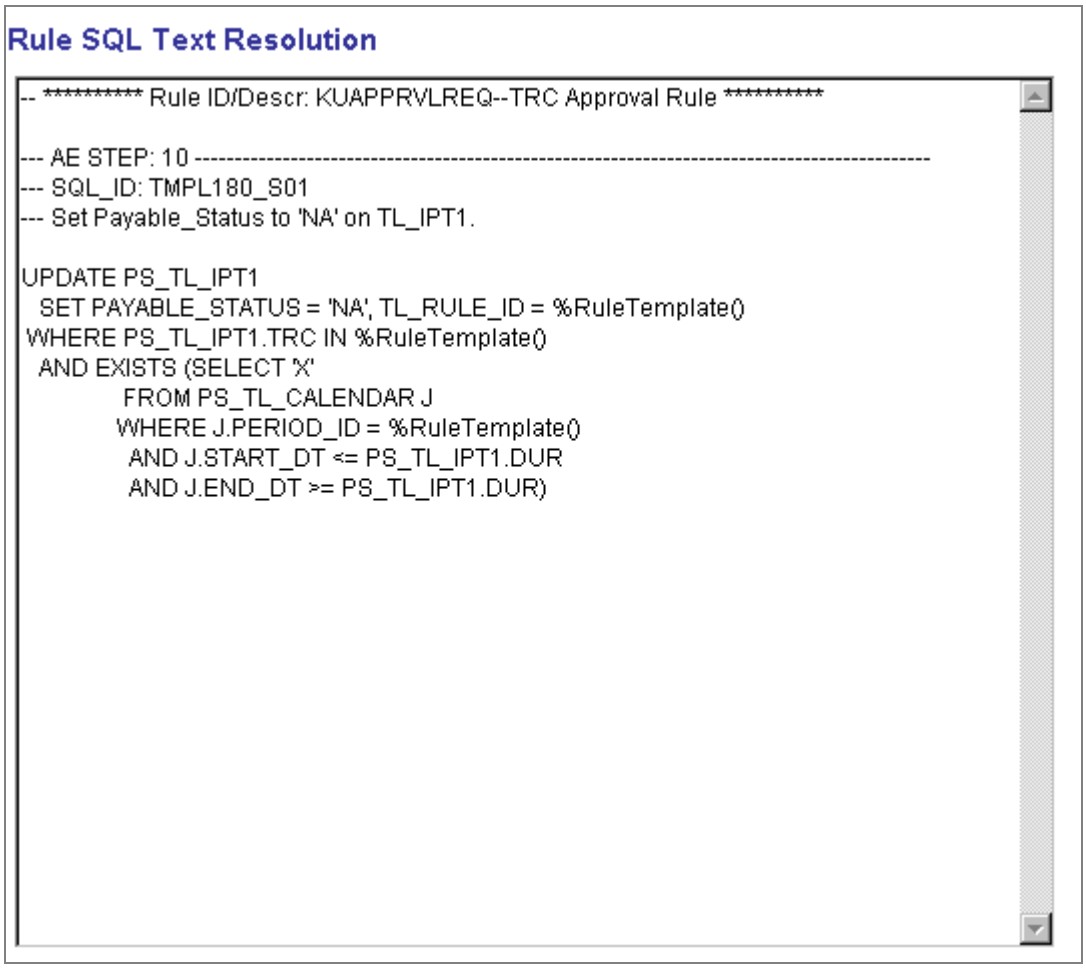
Description Enter a short description of what this rule step should accomplish.

See Also

Using Actions and Conditions to Create Rules

Viewing the SQL Text of a Rule Step

Access the Rule SQL Text Resolution page.



Rule SQL Text Resolution page

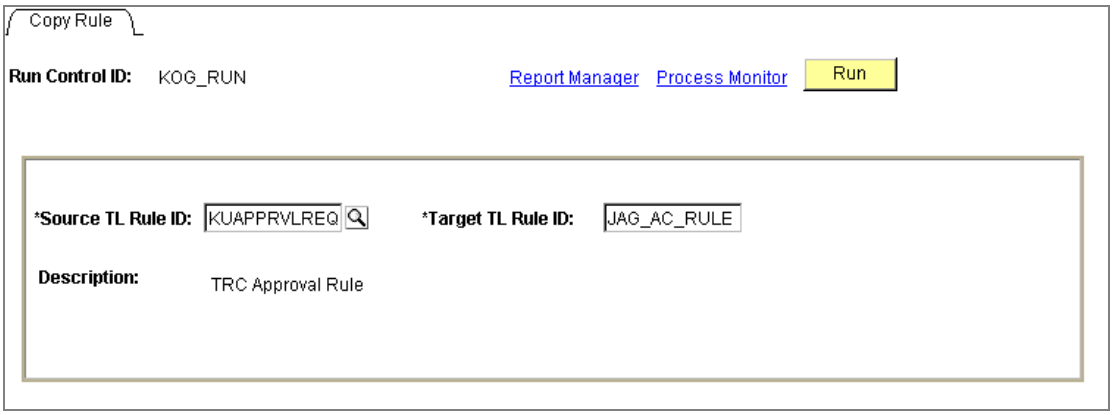
Copying Rules

Access the Copy Rules page.

To copy a rule:

1. Duplicate a rule by giving it a different name.
2. Modify the new rule.

   The copy function is similar to a Save As, and is performed when you save the page. Use the Define Rule Header page to modify the copy.



Copy Rule page

Source TL Rule ID Select the rule to copy.

Target TL Rule ID Enter a name for the duplicate rule.

Adding Rules to a Rule Program

After you organize the components of your rules in the proper order, 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 executes and the order in which it executes the rules. Rules programs are also the method by which you assign attendance programs to time reporters.

If you have elected to use online rule processing, the number of online rules you can include in a rule program is determined by your entry in the Maximum Online Rules field on the TL Installation page.

Adding rules to a rule program comprises the following tasks:

1. Naming and describing the rule program.
2. Linking an attendance program to the rule program.
3. Selecting the rules in the program and the order in which the Time Administration feature executes them.

Note. To activate a rule program (and its associated attendance program), you must link the program to a workgroup on the Workgroup page.

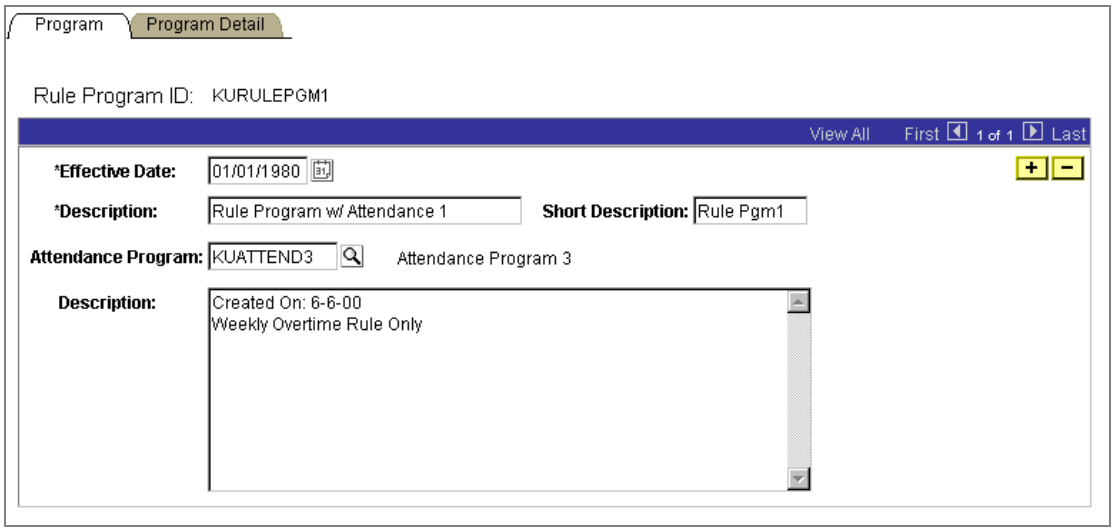
Note. Rule programs are effective-dated, but the individual rules contained within them are not. You cannot modify a rule once you assign it to a rule program. However, you can remove the rule from the rule program and replace it, if appropriate, with a new rule. This feature ensures the referential integrity of rules processing.

Pages Used to Add Rules to a Rule Program

Page Name	Object Name	Navigation	Usage
Program	TL_RULE_PGM_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup1, Rule Programs	To name and enter a description of the rule program. To link an attendance program to a rule program.
Program Detail	TL_RULE_PGMDTL_PNL	Go, Define Business Rules, Define Time and Labor Rules, Setup1, Rule Program Detail	To select the rules to be included in the program and the order in which the Time Administration program should execute them.

Assigning an Attendance Program to a Rule Program

Access the Program page.



Program page

Attendance Program Select the attendance program to associate with this rule program, if applicable. Attendance programs contain rules that track various attendance issues.

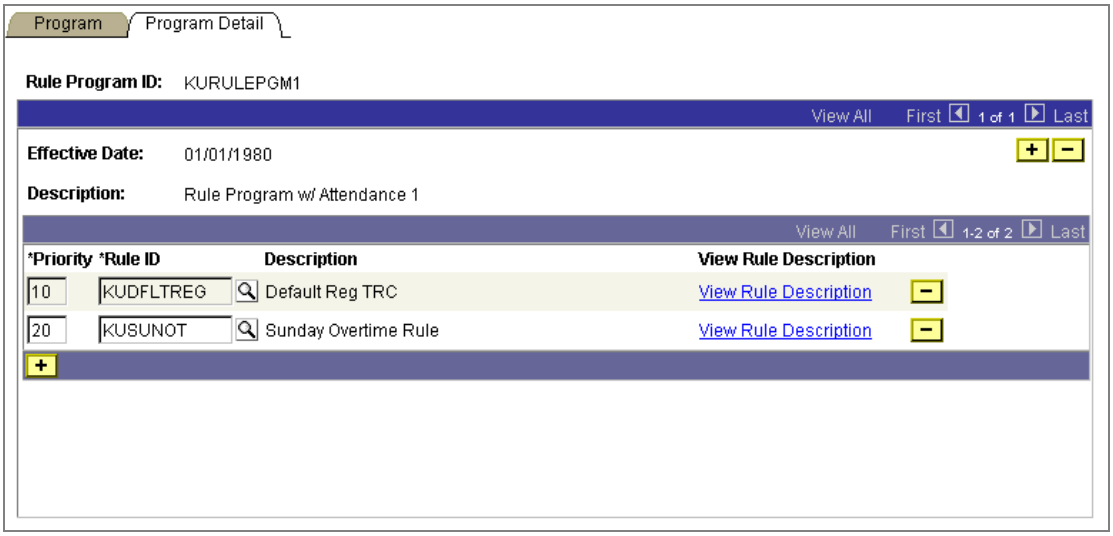
Description Enter a complete description of the rule program in this field.

See Also

Defining Attendance Programs

Selecting Rules for a Program

Access the Program Detail page.



Program Detail page

Note. The maximum number of online rules you can add to a rule program is determined by the entry in the Maximum Online Rules field on the TL Installation page.

Priority

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 because 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 the Referential Integrity process. 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 is updated to the minimum effective date of reported or payable time for the time reporter.

Rule ID Select the rule to include in the program.

Note. This field triggers the Referential Integrity process. 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 is not updated. If, however, the earliest change date is null or greater than the effective date of the setup table change, the earliest change date is 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 for reference

View Rule Description Click to see the full text description of the rule.

CHAPTER 12

Understanding Batch Processing in Time Administration

This chapter provides an overview of the Time Administration batch process and discusses how to:

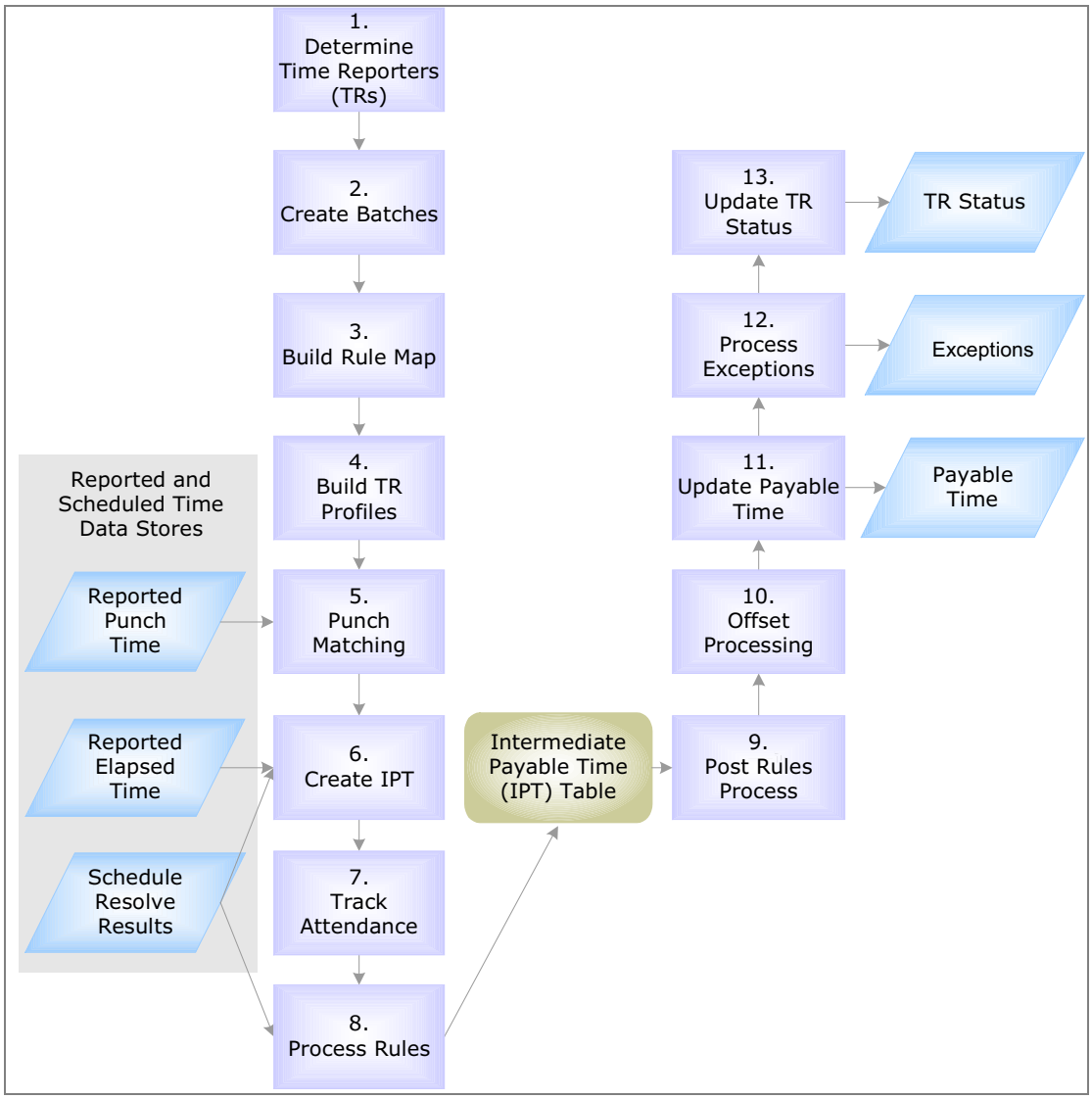
- Perform the Time Administration batch process.
- View time reporter status.
- Start the Time Administration process.
- Generate and view runtime statistics.
- Use batch processing tips.

Understanding Time Administration Process Flow

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, 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 batch process consists of a series of programs created with the PeopleSoft Application Engine development tool. Locate these programs in PeopleSoft 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.

The individual Application Engine programs are joined together as illustrated in the following 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. 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: Determining Time Reporters to Process
TL_TA000300	**Step 2:** Combining Time Reporters into Batches
TL_TA000400	Step 3: Building the Rule Map
TL_TA000500	Step 4: Building Time Reporter Profiles

Program Name (Technical)	*Function*
TL_TA000600	Step 5: Matching Punches
TL_TA000700	Step 6: Creating Intermediate Payable Time
TL_TA000750	Step 7: Tracking Attendance
TL_TA000800	Step 8: Processing Rules
TL_TA000900	Step 9: Performing Post-Rules Processing
TL_TA001000	Step 10: Processing Adjustments
TL_TA001100	Step 11: Updating Payable Time
TL_TA001200	Step 12: Processing Exceptions
TL_TA001300	Step 13: Updating TR Status

Understanding Batch Processing Terms and Concepts

The following terms are used throughout the documentation on batch processing, and are defined in the following table.

Date Under Report (DUR) The actual date of the time being reported for a shift as defined by the Day Breaker Options and Day Breaker Range.

Earliest Change Date (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.

TA Status (TA_STATUS) This field is used to determine whether a time reporter should be processed through Time Administration. Valid values are *Y* (the time reporter should be processed) and *N* (the time reporter should not be processed).

Step 1 - Determining Time Reporters to Process

This process can be divided into two phases.

Phase 1: Select Time Reporters for Processing Select the groups or individuals to process on the Time Administration run control page. Time Administration then narrows the population of time reporters to be processed to those who meet the following selection criteria:

If you are creating Payable Time, the system processes only time reporters whose TA_STATUS is *Y* and whose EARLIEST_CHGDT (earliest change date) is less than or equal to the current 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.

After the system has applied its selection criteria to the time reporters you 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 current or process date selected on the Time Administration Run Control page are 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 must 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—Combining Time Reporters into Batches, and are used to help group the population you are processing into batches.

In this section we discuss:

- How the system uses the TA_STATUS and EARLIEST_CHGDT fields to narrow the time reporters you've entered on the Time Administration run control page to those who actually meet the criteria for processing.
- 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 is used in Step 2—Combining Time Reporters Into Batches.

See Also

Launching the Time Administration Process

"Establishing Workgroups"

"Setting Up Basic Tables," General Rules for Building Periods and Calendars

Understanding Time Reporter Status

To understand how the system selects time reporters for processing, you must 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 the TL_TR_STATUS table is shown below:

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 *Y* (the time reporter should be run) and *N* (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 *time* the transaction occurred—not the *date under report (DUR)*.

Note. 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 Starting the Time Administration Process 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 is 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 current 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. After a time reporter has been processed, the time reporter is not 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 starts the Validation process, which causes TL_TR_STATUS to be updated.

- Changes to effective-dated rows of information using the online system initiator Referential Integrity and starts the Validation process. The Validation process updates TL_TR_STATUS.

Note. 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-Updating 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 is not reset in the usual way. Instead, TA_STATUS will remain *Y* and the EARLIEST_CHGDT is changed to the earliest Exception date, so that the time reporter can be processed again after the exception is resolved. For example, suppose 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 remains *Y* and EARLIEST_CHGDT is reset from 1 September to 9 September.

Using TA_STATUS and EARLIEST_CHGDT to Select Time Reporters for Processing

As noted earlier, the system processes only time reporters whose TA_STATUS is *Y* and whose EARLIEST_CHGDT is less than or equal to the current or process date specified on the TA Run Control page. You set the run control date to either the current date or another date (the process date) depending on who you want to process and what periods you want to process.

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 date selected on the Time Administration Run Control page are processed.

See Also

Launching the Time Administration Process

"Setting Up Basic Tables," Exceptions and Validation Criteria

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 the Process Time Admin page.

After 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 must 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.

Note. 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—Combining 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.
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:

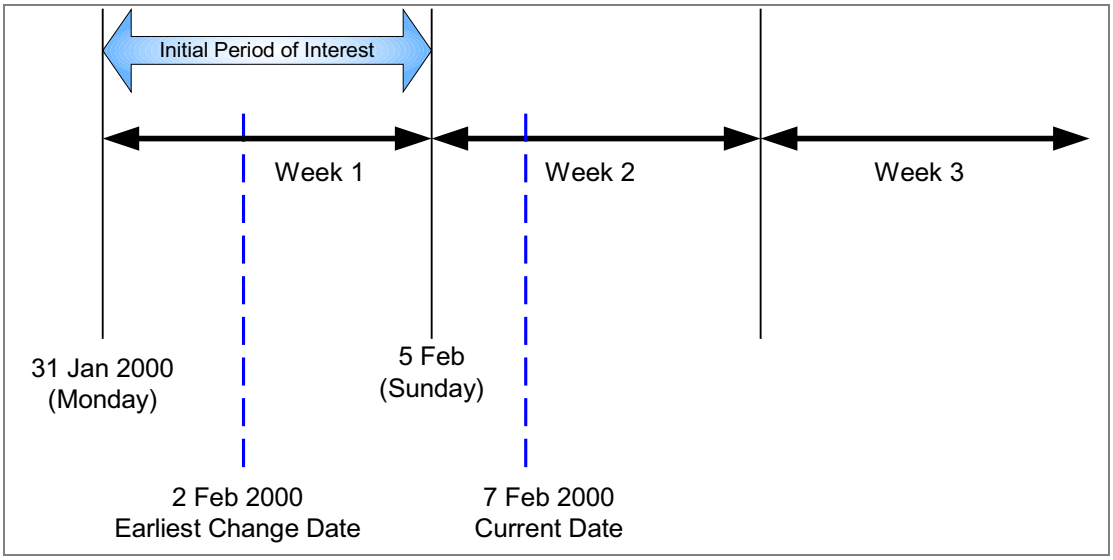
- It determines the EARLIEST_CHGDT for the time reporter being processed.
- It identifies the time reporting period (based on the Time Period ID in the workgroup table) intersected by the EARLIEST_CHGDT.

- 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 is set to the last date of reported time.

The start and end date information in this table is used in Step 2—Combining 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 - Combining 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 following steps.

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 detects the transfer when it reads the time reporter's TL_EMPL_DATA record. The transfer causes 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 are 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.

2. Define Month and Year.

   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 creates 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 must be processed, the time reporter will be processed in multiple batches—one for each month.

Note. The system does not reprocess an entire workgroup because one member of the workgroup has prior period adjustments. Only the time reporter who has changes to prior period data is reprocessed.

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 Building the 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.

Note. 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 so, you can reduce the size of batches by completing the Max Employees in Rules Run field on the TL installation page.

See Also

"Establishing Workgroups," Making Workgroup Transfers and Making Changes to a Workgroup's Rule Program

Step 3 - Building the Rule Map

The initial period of interest calculated in Step 2 and referenced in Step 3 represents only the minimum amount of data (or time) that must 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 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.

After the rule map is complete, Time Administration sends 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.

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 illustrates how the system determines the maximum date range for the final period of interest:

Example: Determining the Final Period of Interest

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).

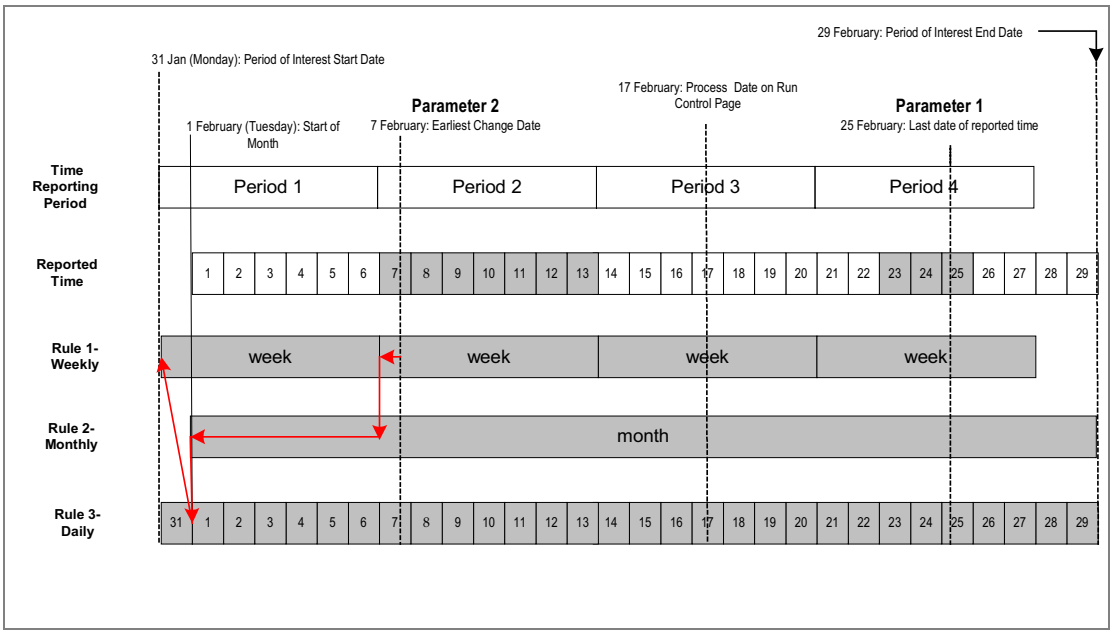
- The current week (the week to be processed) begins on 7 February.

- The payee has 3 rules in his rule program as represented in the following diagram: a weekly rule, a monthly rule, and a daily rule. Each of these rules is assigned a priority from one to three.

- 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

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:

- Time Administration determines the latest date of reported time. In the preceding example, this date is 25 February. This date—identified as Parameter 1 in the diagram—is used to determine the final period of interest end date.

Note. 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 is the last day of the time period intersected by the earliest change date (the end of Period 2 in our example). This date is 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 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, 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).

  - 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 influence Payable Time. Consider the example: 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 influence 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 affect the monthly rule: this is the weekly rule period that begins on 31 January.

Note. The purpose of going back up through the rule program can be explained as follows: Suppose that the weekly rule in the example 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 initiate 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 must 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

After 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.
- After Intermediate Payable Time has been processed, Time Administration passes all or part of this time to Payable Time.

In this section we discuss 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

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, for example, 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 need data going back at least to the beginning of the current month (to satisfy the needs of your monthly rules).

Let's examine the following rules for how Time Administration creates Payable Time for positive time reporters, and then review what occurs 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.

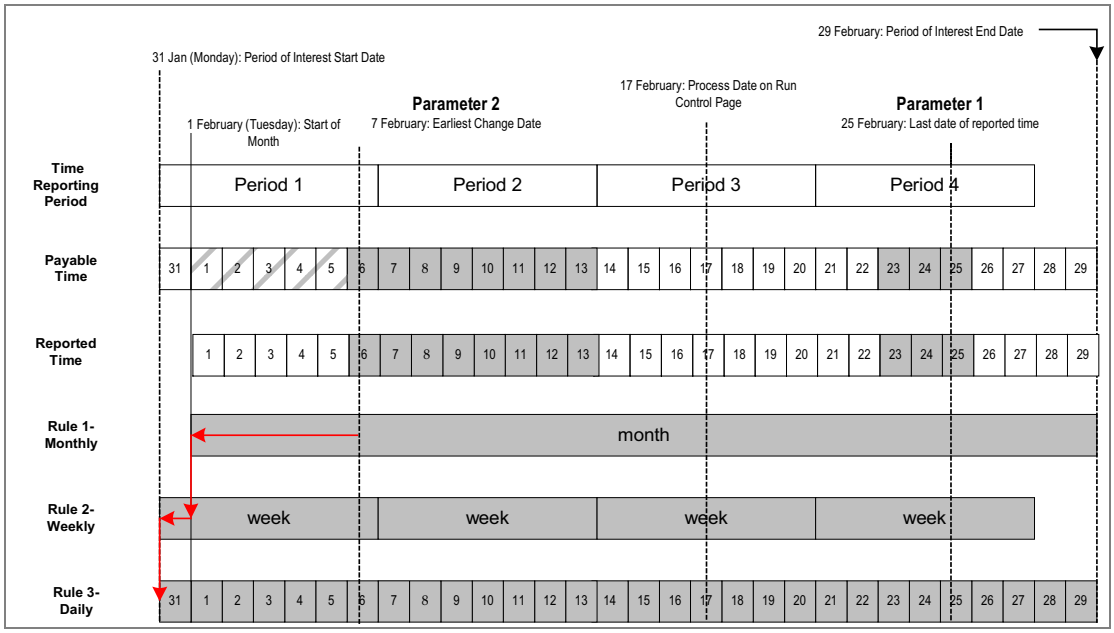
In addition, Payable Time includes:

- Any positively reported time for dates *before* the current workgroup period.
- Any positively reported time for dates *following* the current workgroup period.
- Payable Time also includes 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 Building the Rule Map Process to show the type and extent of the data that can be passed from Intermediate Payable Time to Payable Time. 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 following diagram: a monthly rule, a weekly rule, and a daily rule. Each of these rules is assigned a priority from one to three.
- 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.



Determining Payable Time

This diagram illustrates 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 preceding diagram, 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 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) 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) are recalculated, offsets generated, and new data sent to Payable Time.

Note. The Process Date on the run control page has no *direct* affect on what is sent to Payable Time in the case of positive time reporters—its primary function is to select time reporters for processing. Time Administration processes only time reporters whose earliest change date is less than or equal to (<=) 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 takes precedence over scheduled time—that is, Time Administration does 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.

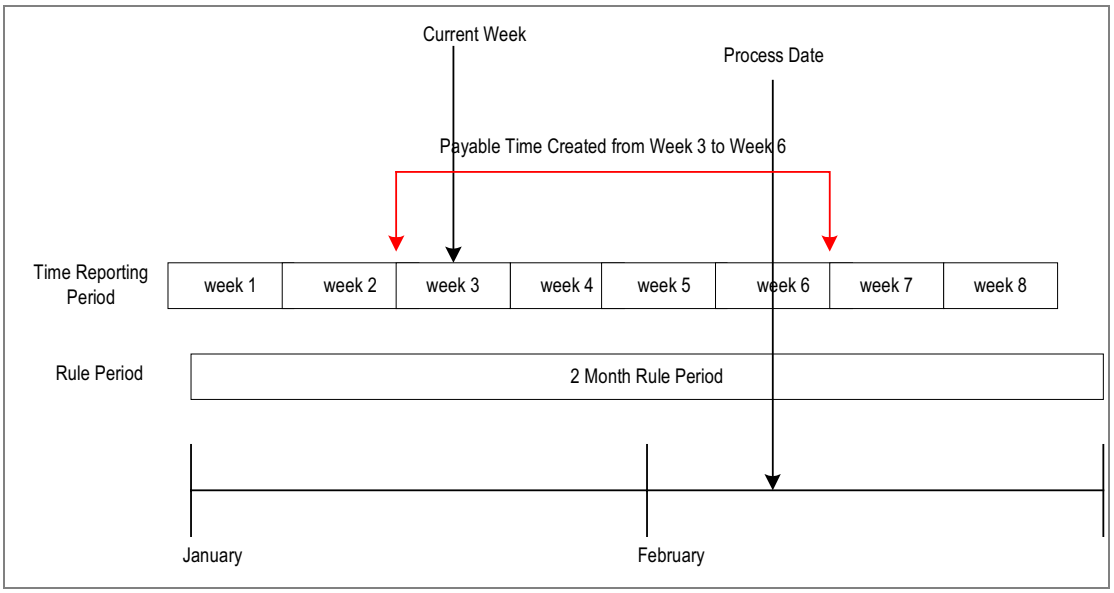
  - Any positively reported time for dates *following* the current workgroup period.
  - Payable Time also includes days for which time has been created using rules processing.

- In the case of exception reporters, you can also use the Process Date on the run control page to send additional data to Payable Time according to the following criteria:
  - If any rule period you are processing is greater than or equal 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 less than or equal to 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 you use a Process Date that is within the date range of the current workgroup Time Period ID, Time Administration creates time for exception reporters for the current workgroup period only (regardless of the date ranges for the rule periods).

Note. 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 ensures that all exception reporters will have time created for them within the current period.

Let's view 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



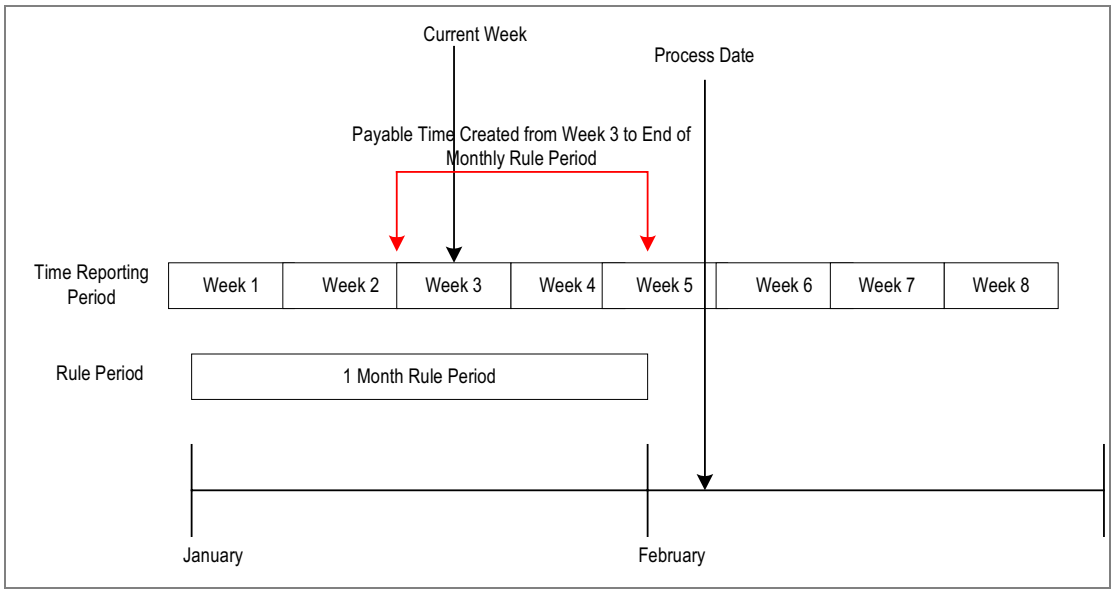
Payable Time extends to future period

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

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.

Note. 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.

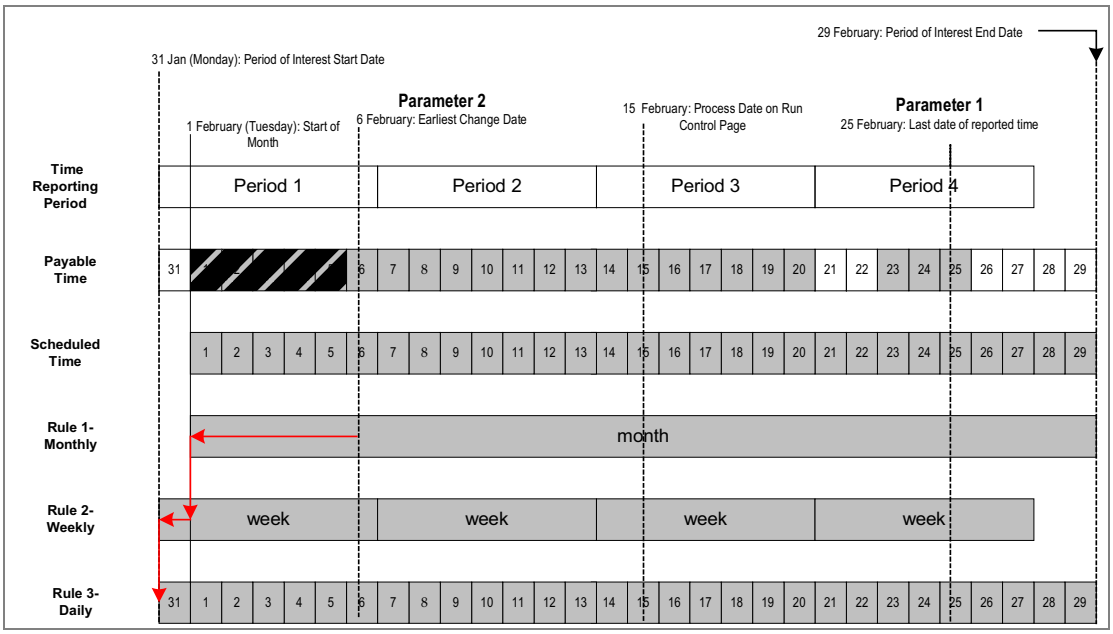
Understanding the Sources of Payable Time

We've reviewed several examples of how to use the Process Date on the run control panel to extend Payable Time past the current workgroup period. Let's examine 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

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 following diagram: a monthly rule, a weekly rule, and a daily rule. Each of these rules is assigned a priority from one to three.
- 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.



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 preceding diagram, 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 must make a small modification to our example. Let's assume that the monthly rule in the diagram 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), 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.

See Also

Launching the Time Administration Process

Step 4 - Building 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 check a single table containing data on the time reporters in each of your batches for the period of interest defined by the Building the 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 must process.

See Also

"Creating Rules in Time Administration"

Step 5 – Matching Punches

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 Building the Rule Map process. The Punch Matching process calls the schedule resolution process to resolve the time reporters' schedules.

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 the exception type), or the reported Punch Time Table (TL_RPTD_PCHTIME).

   To select the appropriate punches for processing, the system checks 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 begins processing with the last in punch that occurred before the start date. This ensures 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 checks the future for the next out punch and stores all punches up to and including the next out punch.

2. Apply pre-rules rounding.

   Time Administration checks 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 and 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 – Performing Post-Rules Rounding.

Note. The Round Punches process is skipped if Forecast Payable Time is chosen on the run control page, because scheduled punches are already rounded.

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3. Apply daybreaker logic.

This subprocess is initiated 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 p.m. and continues until 5 a.m. 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.

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). The resulting in and out segments, as indicated in the following 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		

Note. The Calculate Duration process is 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.

See Also

"Establishing Workgroups," Setting Up Day Breaker Options

Step 6 - Creating 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 then applies 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, and 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:

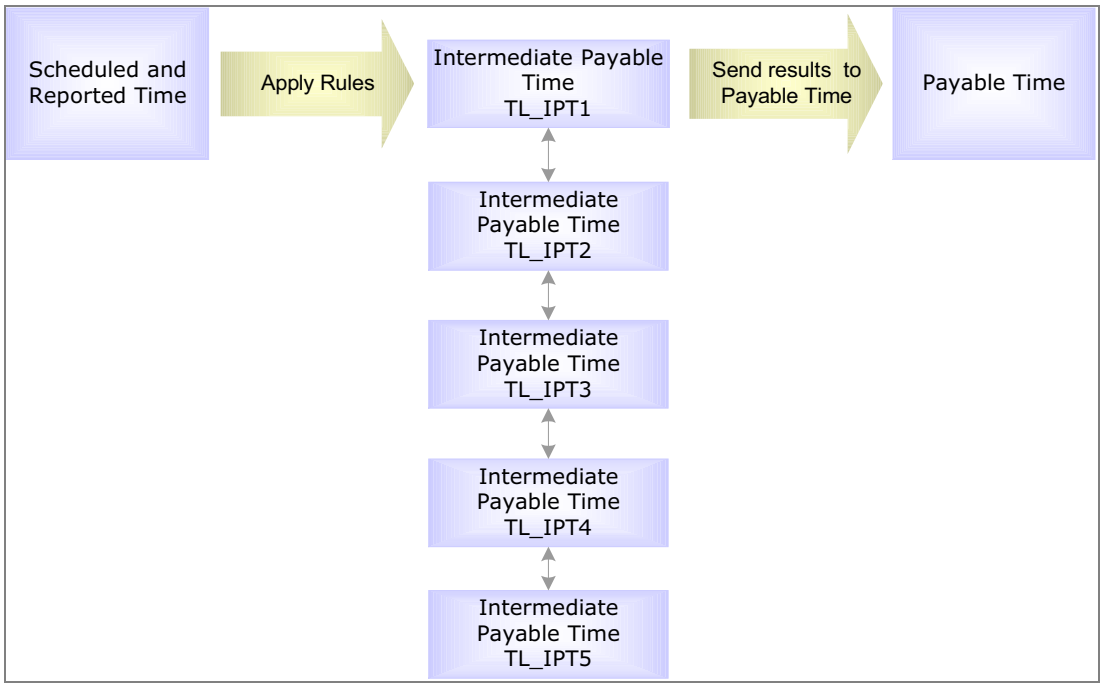
- TL_IPT1
- TL_IPT2
- TL_IPT3
- TL_IPT4
- TL_IPT5

Initially, Time Administration loads all reported and scheduled time data for all time reporters who must 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.

Note. 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 must return any processed data you want to send to Payable Time back to TL_IPT1.

Warning! 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 following order. This information is 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.

Rules Override Transactions

If rule overrides have been entered through the Override Rules page, the Time Administration process extracts the overridden records from TL_IPT1 and places them into the working table, TL_TA_RUL_OVR, before applying rules to the data stored on TL_IPT1.

Time Administration applies rules to all records stored on TL_IPT1 and proceeds 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.

See Also

"Defining Task Reporting Requirements"

"Managing Time," Overriding Rules for a Day

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 process multiple jobs.

Field Name	*Description*
DUR	Date Under Report (Date in which time is reported for)
SEQ_NBR	Sequence Number
PUNCH_TYPE	Punch Type (In, Out, Break, Meal, and so on)
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

Field Name	*Description*
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

Field Name	*Description*
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 - Tracking 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.

See Also

"Creating Rules in Time Administration"

Step 8 - Processing 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 – Building the 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.

Note. 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.

See Also

"Creating Rules in Time Administration," Adding Rules to a Rule Program

Step 9 - Performing 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.

Note. 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 is not created for time reporters on the days for which there are medium and high level exceptions.

See Also

"Introduction to PeopleSoft Time and Labor," Understanding Validating Time

"Appendix B: 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.

See Also

"Appendix B: 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 is written to the Exceptions Table. If the comp time balance or leave time balance is sufficient, Time Administration updates 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, the following conditions must apply:

- 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.

Note. 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. **Note.** 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 then becomes available for data entry, and you can specify the maximum negative hours allowed under the Leave Plan. This field remains hidden if the Time and Labor application 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 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 validates leave time.

2. Check TRCs on IPT Table against settings on TRC Table.

   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.

   The system checks the Leave Accrual Table to calculate available hours using the following formula:

   Available Hours = Hours carried over from previous year

   + Earned year-to-date

   - Taken year-to-date

   + Adjusted year-to-date

   + Bought year-to-date

   - Sold year-to-date

   - Unprocessed hours taken

   - Unprocessed hours adjusted

   - Unprocessed hours sold

4. Check reported leave against available balance.

   The system checks reported leave against the available balance as follows:

   If available hours + negative hours allowed is less than 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.

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, 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.

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 validates comp time.

2. Check TRCs on IPT Table against settings on TRC Table.

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 processes 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 zer0)
	+ 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 greater than the available hours plus 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 inserts 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:

Available Hours for Comp Time Earned =	Sum of comp time earned
	- Sum of comp time expired
	- Sum of comp time taken
	+ Maximum positive hours

6. Check comp time earned against available balance.

   The system checks to see if the reported Comp Time earned is more than the available hours:

   If reported Comp Time Earned is greater than 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 inserts a new row of data into TL_PAYABLE_TIME.

See Also

"Setting Up Basic Tables"

"Establishing Time Reporting Codes," Defining a TRC Program

"Appendix B: Exceptions and Validations"

Expand Task Profiles

When a task profile is reported positively or has been updated by the system during Step 6--Creating 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

Time Administration checks 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 applies the specific rounding rules you defined on the Workgroup page.

Note. 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.

See Also

"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 X (COMPRATE + FACTOR_RATE_ADJ) X FACTOR_MULT

The components of this formula are defined as follows:

Components/Fields	*Definition*
TL_QUANTITY	The quantity entered by the time reporter or taken from the time reporter's schedule.
COMPRATE	Either a rate or a compensation rate code. The derivation of the rate code is explained in Step 1 under Calculate Estimated Gross.
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:

   a. 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.

b. 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 checks:
- The Compensation Table (PS_COMPENSATION); if the comp rate is not there, it then checks:
- The Job Code Table (more specifically, the PS_JOBCD_COMP_RATE field on PS_JOB)

c. If no rate or comp rate code is reported, the system checks for a rate on the TRC Table.

Note. If the Comp Rate Code (CRC) is HF (hourly + flat), the reported rate are added to the amount on the CRC and then inserted into the basic formula. If the CRC is PH (percent of hourly), the percent is calculated against the reported rate before inserting into the basic formula.

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d. 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.

Note. 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.

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e. If the system cannot find the information in the previous 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 is calculated using this formula:

TL_QUANTITY X (COMPRATE + FACTOR_RATE_ADJ) X FACTOR_MULT

The Estimated Gross amount is written to the Estimated Gross work Table (TL_W2_EST_GRS) to be used in the final step.

Note. 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.

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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 - Processing 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 are 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.

- 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 enter 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.

See Also

"Understanding Payable Time"

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 creates an earnings row to offset the original amount of 8 hours regular (-8 hours) and creates 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 are 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 checks the most recent set of adjustments. For instance, in the previous example, if the user makes another adjustment to the Date Under Report, the process uses 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 are 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 checking 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-Labor Diluted	Y
ES—Estimated-Ready for Payroll	N
NA—Needs Approval	N
OE – Online Estimate	N

- 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:

#	DUR	TRC	QTY	Est_Gross	Lbr_Dist_Amt	Diluted_Gross
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):

#	DUR	TRC	QTY
1	1/2/00	REG	8

Offsets to Payable Time data (TL_PAYABLE_TIME) that were reported, processed, and paid:

#	DUR	TRC	QTY	Est_Gross	Lbr_Dist_Amt	Diluted_Gross
1	1/2/00	Reg	-4	-40	-40	-40
2	1/2/00	Vac	-4	-40	-40	-40

See Also

"Understanding Payable Time"

Step 11 - Updating 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

Payable Time supplies time data to external systems like Payroll or PeopleSoft Projects, while 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 dates transferred to Payable Time may not be identical to the range of dates originally loaded in the Intermediate Payable Time Table.

See Also

Step 3 - Building the Rule Map

Understanding How Time Administration Formats Payable Time

The Payable Time and Intermediate Payable Time (TL_ITP1) 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 adds 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 see the difference.

Intermediate Payable Time Versus Payable Time

As illustrated in the following table, when PeopleSoft 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, 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 in the following table, where there is a record for each segment of time. Rules may later delete or add rows:

PUNCH_TYPE	*PUNCH_BEGIN*	*PUNCH_END*	*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

PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY	TASK
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 similar rows (those with the same TRC and task elements) for the same employee and date are 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

Note. 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

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 appears 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
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		

Note. 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 appears 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 appears as follows:

TL_QUANTITY	*TRC*	*TASK*
2.25	Reg	Dept. A
6.75	Reg	Dept. B

Note. 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 do not get a TRC, then they do not get included in calculations in Intermediate Payable Time or Payable Time, but they could still be used to evaluate other miscellaneous rules.

Note. Even though Intermediate Payable Time contains a separate row for each time segment, this 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 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 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.

See Also

"Creating Rules in Time Administration," Creating Rules from a Template

Step 12 - Processing 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, go to the Manage Exceptions page to approve or clear out exceptions.

This 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.* After 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.

Note. Time Administration does not process exceptions when it creates forecasted Payable Time.

Step 13 - Updating TR Status

In this final step of the Time Administration run, the system resets the values in the TL_TR_STATUS record.

Note. Time Administration does not update TR status when it creates forecasted Payable Time.

- For 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 updates TA_STATUS to *Y* and updates EARLIEST_CHGDT to reflect the earliest date of reported time. The time reporter can then be reprocessed.

- For 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 is not 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.

Viewing Time Reporter Status

This section discusses how to view time reporter status.

Before or after you run the Time Administration process, you may want to use the View TR Status page to check the status of a time reporter or a group of time reporters.

For example, before running Time Administration, you can review a group of time reporters to see which members have the appropriate status settings to be processed in the run. Or during system implementation, you may want to check status information after you run Time Administration to verify that the process is updating time reporters how you expect it to. For exception time reporters, the Earliest Change Date should display the beginning of the next time period for the workgroup, and TA_STATUS should be set to *Y* (yes). For positive time

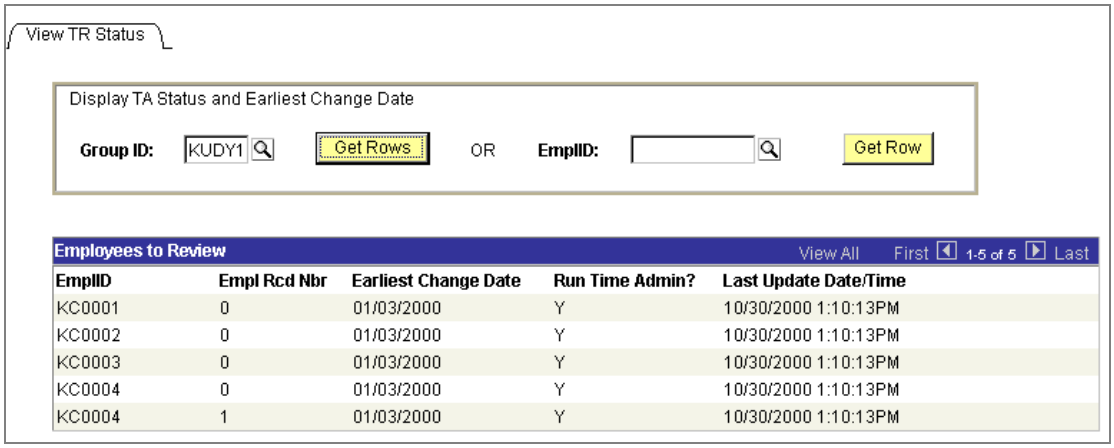
reporters, the Earliest Change Date should be set to null and TA_Status should be set to *N* (No).

Pages Used to View Time Reporter Status

Page Name	*Object Name*	*Navigation*	*Usage*
View TR Status	TL_TR_STATUS	Administer Workforce, Capture Time and Labor, Inquire, View TR Status	View the TR status and earliest change date for the time reporter or group of time reporters you specify.

Viewing Time Reporter Status

Access the View TR Status page.



View TR Status page

Earliest Change Date The earliest addition or update to time-related data for a time reporter since the last Time Administration run. No entry indicates a null value. This date is a trigger for Time Administration's determination of a time reporter's period of interest.

Run Time Admin? Indicates whether the time reporter will be processed the next time the person is selected for the Time Administration process. Displays the value of TA_STATUS: Y (Yes), the time reporter is ready for processing; or N (No), the time reporter is not ready for processing.

See Also

"Setting Up Time Reporters," Understanding Time Reporter Data

Launching the Time Administration Process

This section explains how to launch the Time Administration process.

To start the batch process, use the Process Time Admin page (Time Administration Run Control page). If you have selected the Automatic Rules Run option on the TL Installation page, the batch process is also called automatically when you:

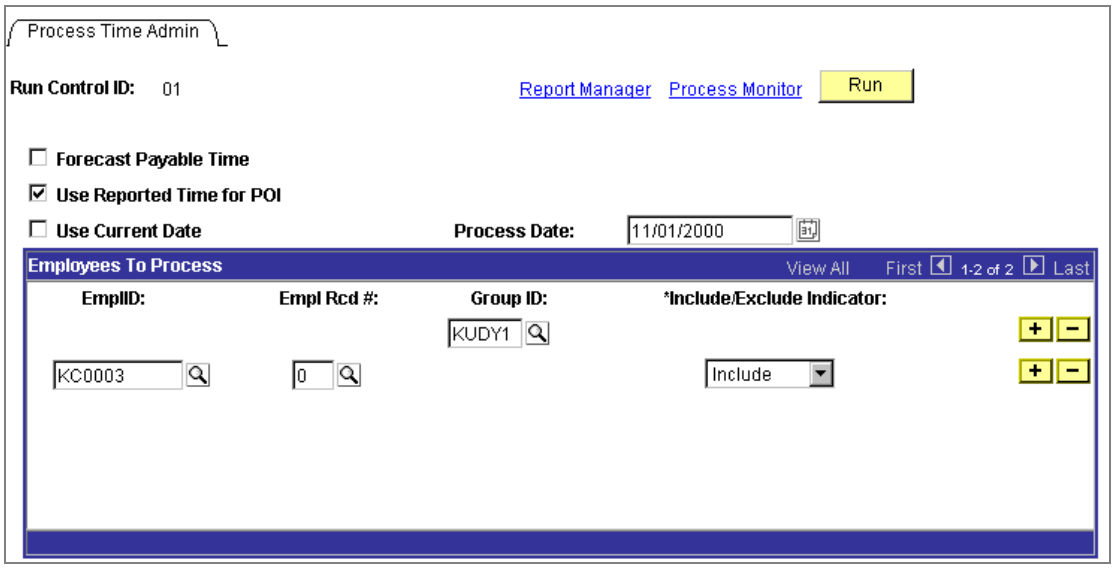
- Invoke the Submit process after entering time on the Rapid Entry page.
- Start the GP Absence process from the GP Absence page, if Time and Labor is integrated with Global Payroll. The GP Absence process calls Time Administration immediately after it retrieves absence data from Global Payroll.

Pages Used to Start the Time Administration Process

Page Name	*Object Name*	*Navigation*	*Usage*
Process Time Admin page (Process Time Administration page)	TL_TA_RUNCTL	Administer Workforce, Capture Time and Labor, Process, Time Administration	Select the time reporters and/or groups of time reporters 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.

Starting the Time Administration Process

Access the Process Time Admin page.



Process Time Admin page

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.

Forecast Payable Time

Select if you do not want to send the results of the Time Administration Batch run to Payable Time, but want to use 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 this check box, the **Process Period with this Date** field becomes available. 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 check box 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

Select to create Payable Time. If you want 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.

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.

You can have time processed through the period that intersects with the process date for both exception and positive time reporters.

Note. The system date is automatically set by default into the **Process Date** field, but can be modified.

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 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 this group box to select the time reporters that 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 that you want to include or exclude from the run.

Empl Rcd #

Select the Employee Record Number for the time reporter's job that 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 to run this request. PeopleSoft Process Scheduler runs the TL_TA process at user-defined intervals.

See Also

Step 1 - Determining Time Reporters to Process

PeopleTools PeopleBook: Process Scheduler

Restarting Batch Processes in Time and Labor

Occasionally, an error may prevent a batch process, such as Time Administration, from completing successfully. When the error is caused by a change to a SQL statement or PeopleCode steps, you can usually fix the error and resume processing directly from the Process Monitor by selecting the Restart Request option and clicking OK.

Do not use the Restart option when:

- A rule that you created causes an abend.
- The error results from a change to the application engine structure, such as the addition, deletion, or modification of a step.

In these cases, create a new run control to ensure that the corrected rule components are brought into the buffer for processing.

See Also

PeopleTools PeopleBook: Process Scheduler, Viewing the Status of Your Process

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.

This section provides an overview of generating and viewing runtime statistics and discusses how to:

- Select the runtime statistics, batch data, and rule information you want the system to generate during each Time Administration run.
- View the macro runtime statistics for the Time Administration process.
- View 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.
- View the Application Engine statistics.
- View batch archives data.
- View batch details.
- View rule map archives.
- View the rule map archive details.

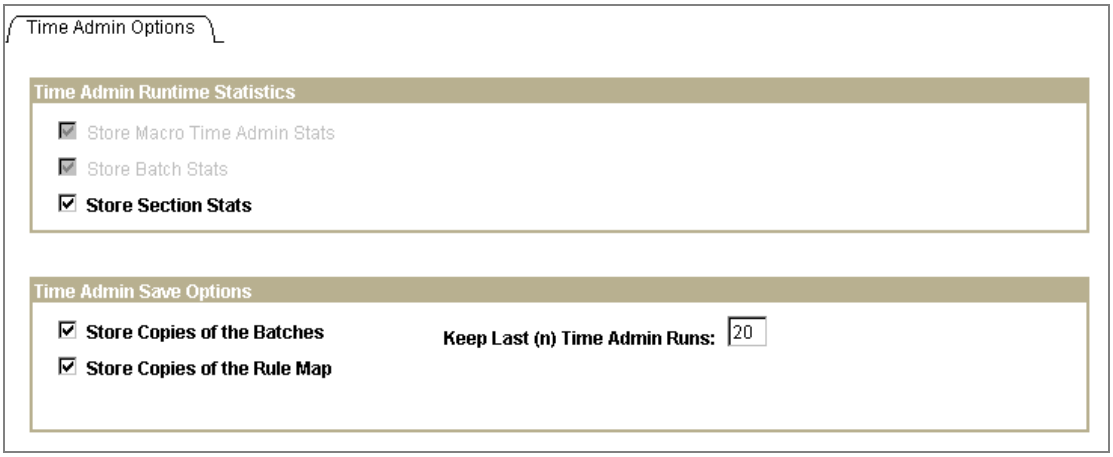
Pages Used to Generate and View Runtime Statistics

Page Name	Object Name	Navigation	Usage
Time Admin Options (Time Administration Options)	TL_TA_OPTIONS	Define Business Rules, Define Time and Labor Rules, Setup1, Time Admin Options	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.
RSL Maintenance	TL_TA_RSL_MAINT	Administer Workforce, Capture Time and Labor, Inquire, View Runtime Statistics	View the macro runtime statistics for the Time Administration process.
Batch Statistics	TL_TA_RSL_BATCH	Administer Workforce, Capture Time and Labor, Inquire, View Runtime Statistics	View 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. 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.
Application Engine Section Statistics	TL_TA_RSL_SECT	Administer Workforce, Capture Time and Labor, Inquire, View Runtime Statistics	View the Application Engine statistics.
Batch Archives	TL_TA_ARCH_BAT	Administer Workforce, Capture Time and Labor, Inquire, Archived Batches	View batch archives data.
Batch Archives: Archive Batch Detail	TL_TA_ARCH_BAT_SEC	Select the View Details button on the Batch Archives page.	View batch details.
Rule Map Archives	TL_TA_ARCH_RMAP	Administer Workforce, Capture Time and Labor, Inquire, Archived Rule Maps	View rule map archives.

Page Name	Object Name	Navigation	Usage
Archive Rule Map Detail	TL_TA_ARCH_RMP_SEC	Click the View Detail button on the Rule Map Archives page.	View the rule map archive details.

Selecting the Runtime Statistics and Date to Generate

Access the Time Admin Options page (Time Administration Options page).



Time Admin Options page

Time Admin Runtime Statistics

Use the following three options to define the runtime statistics you want the Time Administration process to generate:

Note. 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 can also access macro level Time Administration statistics for the current run. You cannot, however, access detailed, section level statistics.

Store Macro Time Admin Stats Select to generate high level statistics for the current run as a whole, information about when the Time Administration process started and stopped, how may many rows were processed, and so forth.

Store Batch Stats Select 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 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 enables you to generate and view statistics on such subprocesses as Punch Matching, Generate Intermediate Payable Time, and so forth.

Note. 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

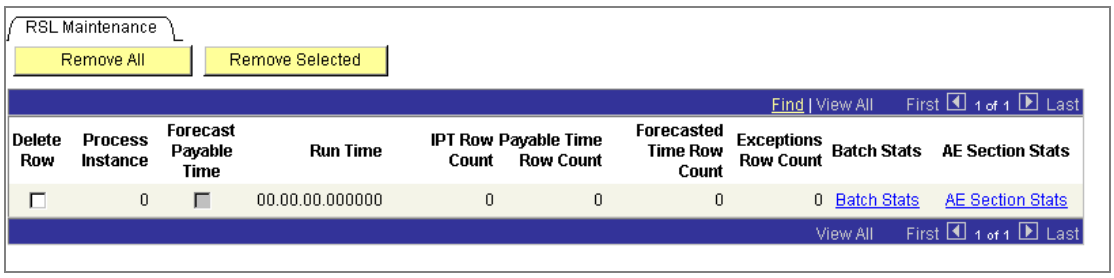
Use the fields in this group box to specify if you want to generate information about the batches and rules processed during the run. You can also specify how many previous runs of statistics, batch data, and rules data you want to store.

Store Copies of the Batches	Select to generate data for each batch of data processed.
Store Copies of the Rule Map	Select 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 keeps the data for the last three runs.

Note. 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

Access the RSL Maintenance page.

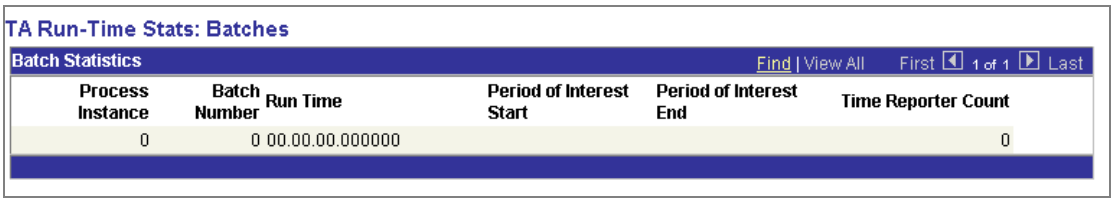


RSL Maintenance page

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.
IPT Row Count	The number of rows created in Intermediate Payable Time.
Payable Time Row Count	The number of rows created in Payable Time.
Forecasted Time Row Count	The number of rows created in Forecasted Payable Time.
Exceptions Row Count	The number of exceptions generated when Time Administration was run.
Batch Stats	Click this link to access the Batch Stats page, where you can see additional information about the batch.
AE Section Stats	Click this link to access the AE Section Stats page, where you can see the runtime for each section in the batch.
Remove All	Click this button to delete all statistics that appear on this page and the linked Batch Stats page and AE Section Stats page.
Remove Selected	To delete selected rows of statistics and the corresponding Batch Stats and AE Section Stats pages, select the **Delete Row** check box next to each row you want to delete, then click this button.

Viewing Batch Statistics

Access the Batch Statistics page.


TA Run-Time Stats: Batches

Batch Statistics — Find | View All — First 1 of 1 Last

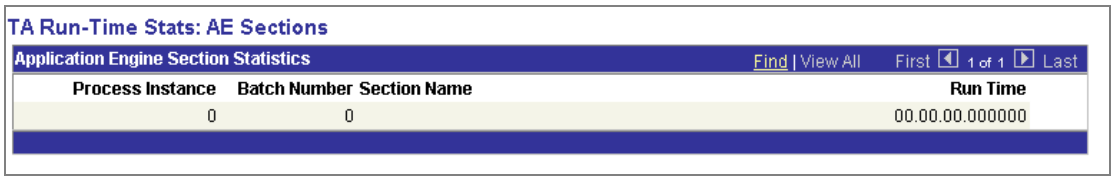
Process Instance	Batch Number	Run Time	Period of Interest Start	Period of Interest End	Time Reporter Count
0	0	00.00.00.000000			0

Batch Statistics page

Time Reporter Count	This is the number of time reporters processed in the batch.

Viewing Application Engine Statistics

Access the Application Engine Section Statistics page.



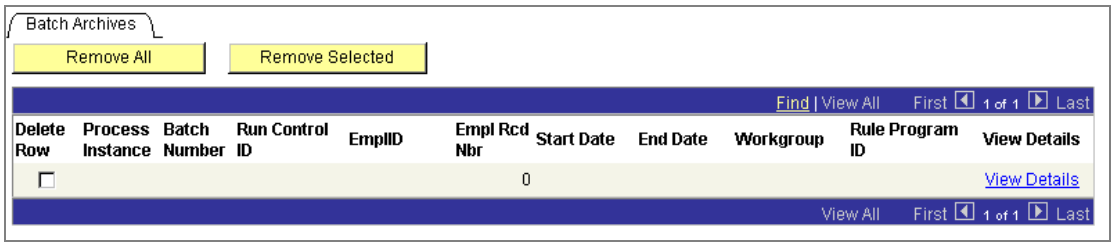
Application Engine Section Statistics page

Process Instance The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.

Section Name This is the section name, that is, the name of the subprocess for which you have generated statistics.

Viewing Batch Data

Access the Batch Archives page.



Batch Archives page

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.

Workgroup The name of the workgroup for which the statistics were generated.

Rule Program ID The rule program associated with the batch.

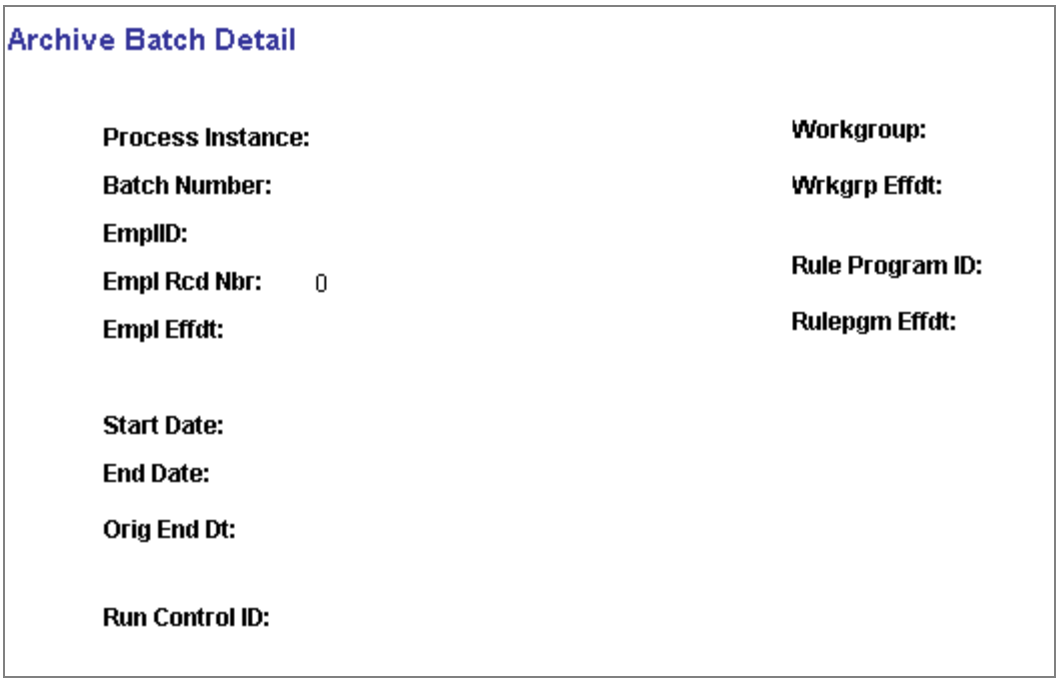
View Details Click this link to access the Archive Batch Detail page.

Remove All Click this button to delete all statistics that appear on this page and the linked detail page.

Remove Selected To delete selected rows of statistics and the corresponding detail pages, select the **Delete Row** check box next to each row you want to delete, then click this button.

Viewing Batch Details

Access the Batch Archives: Archive Batch Detail page.



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 (employee effective date) — 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.

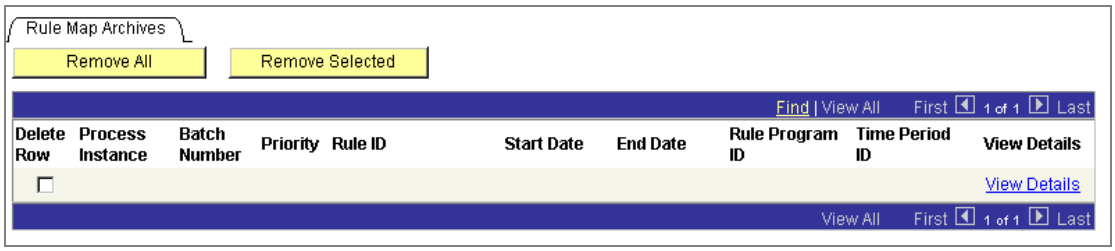
For forecasted payable time, the system follows a similar process to determine the original end date, but substitutes the earliest change date with the date entered in the Process Date field on the Time Administration run control page.

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 Rule Map Archives

Access the Rule Map Archives page.



Rule Map Archives page

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.

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.

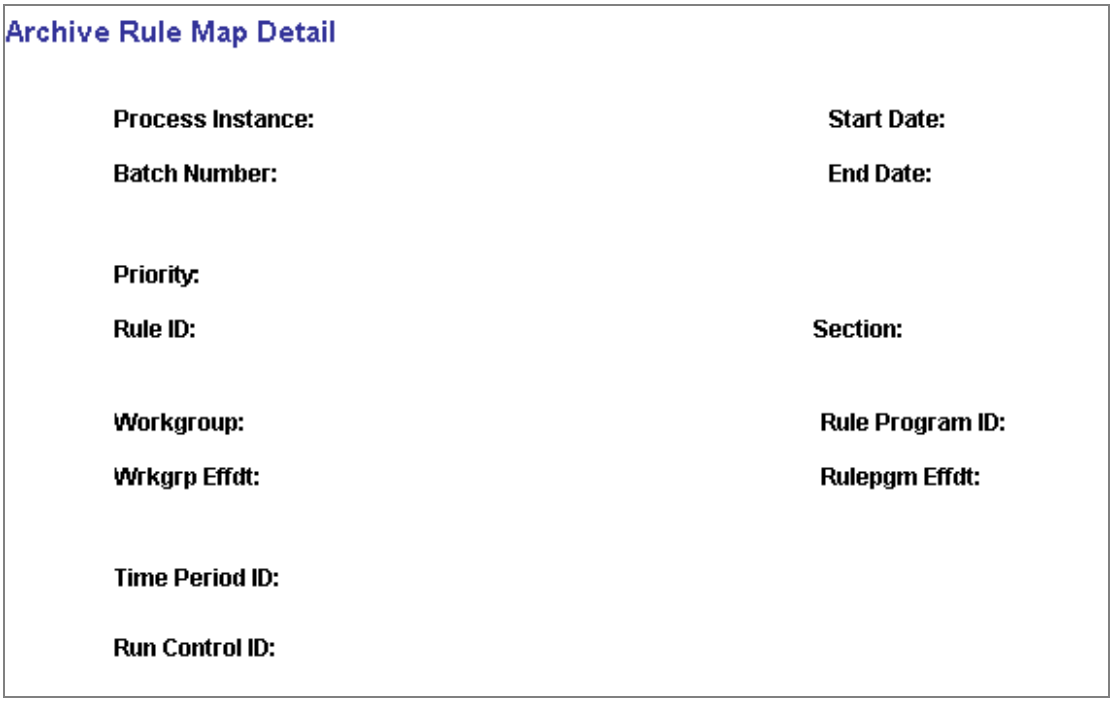
View Details Click this link to access the Archive Rule Map Detail page.

Remove All Click this button to delete all statistics that appear on this page and the linked detail page.

Remove Selected To delete selected rows of statistics and the corresponding detail pages, select the **Delete Row** check box next to each row you want to delete, then click this button.

Viewing the Archive Rule Map Details

Access the Archive Rule Map Detail page.



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.
Wrkgrp Effdt (workgroup effective date)	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.

Using Batch Processing Tips

Note. The information contained in this topic assumes that you are familiar with the explanation of how Time Administration calculates the period of interest, and 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?

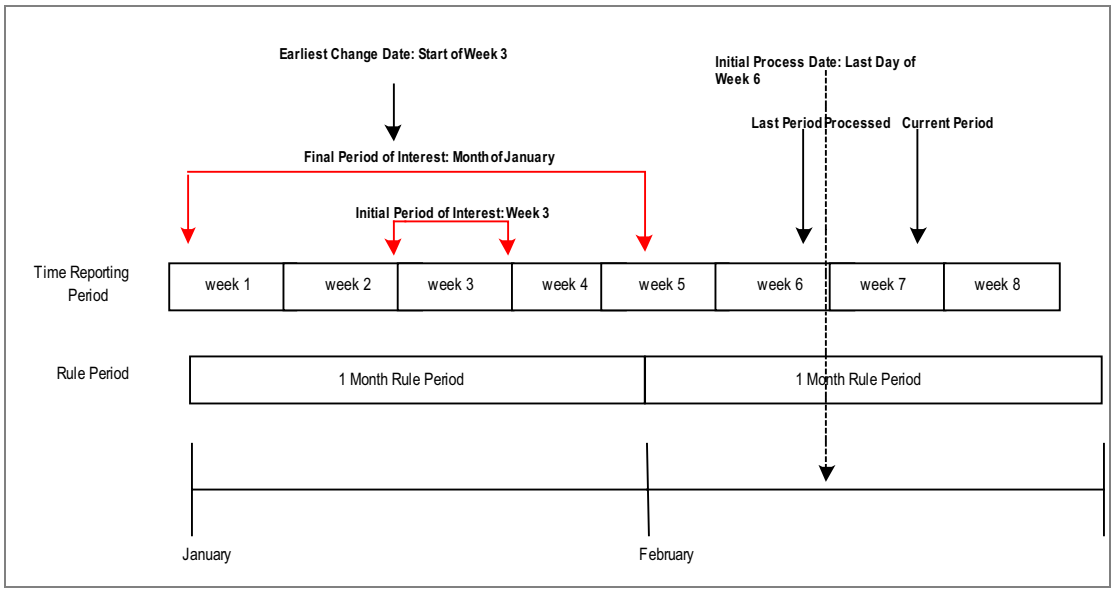
A. Because Payable Time cannot be created for a date or a period that is not contained within the period of interest (and which is therefore not included in Intermediate Payable Time), the current period may need to be processed in a separate run from the prior period adjustment.

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

Assume the following:

- You are processing an exception time reporter.
- The time reporter belongs to a workgroup with a monthly rule in the workgroup rule program.
- As illustrated in the following diagram, the last period processed for this time reporter is Week 6 (the current week to be processed is Week 7). After Week 6 is processed, the earliest change date is automatically reset to the first day of the next period—that is, Week 7 (after processing an exception time reporter, the earliest change date is automatically reset to the start of the period immediately following the one intersected by the current date or process date used in the current Time Administration run).



Processing both a past and a current period

- After Week 6 is processed, the time reporter makes a change to prior period time—he neglected to report a vacation day at the beginning of Week 3, and then does so during Week 7. 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 for Week 7, setting the process date to the end of the week (Week 7). When the process is started, 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.

Problem:

In a situation like this, you may 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—Week 7 in this example—given that the earliest change date is automatically reset to the start of Week 8 (that is, the start of the period immediately following the one intersected by the current 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 time reporting period following the one intersected by the process date used in the current run. In our example, the earliest change date for our time reporter moves to Week 7 after Week 6 is processed, back to Week 3, and finally to Week 8—but time is not picked up for Week 7. So in this situation (in which there is a prior period adjustment, and the period of interest does not include the "current" period), you can ensure that all the time for a time reporter is processed (both prior and current), by initially setting the process date to the last day of the last period processed (the one prior to the current period you want to process). After running Time Administration, the earliest change date will be reset to the start of the current period, and you can then move the process date into this period and process current time. So in this example, you would first set the process date to the end of Week 6 (the last period processed), run Time Administration, and then process Week 7.

See Also

Updating TL_TR_STATUS When There Is New or Modified Data

CHAPTER 13

Understanding Payable Time

This chapter provides an overview of payable time and describes:

- The stages through which payable time passes.
- The effect of adjustments on payable time.
- When other applications can access payable time.
- Payable Time Table fields.
- Payable status reports.

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.
- The tasks to which time was reported, if applicable.

Payable time can be used in other PeopleSoft applications. 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. Or you could send payable time with estimated or actual costs to PeopleSoft Projects for use in project planning, budgeting, billing, and other activities.

See Also

"Integrating with Payroll Applications"

"Integrating with PeopleSoft Financials"

Payable Time Attributes

Three attributes determine when payable time is available to other applications and how the Time Administration process handles adjustments to payable time. These attributes are:

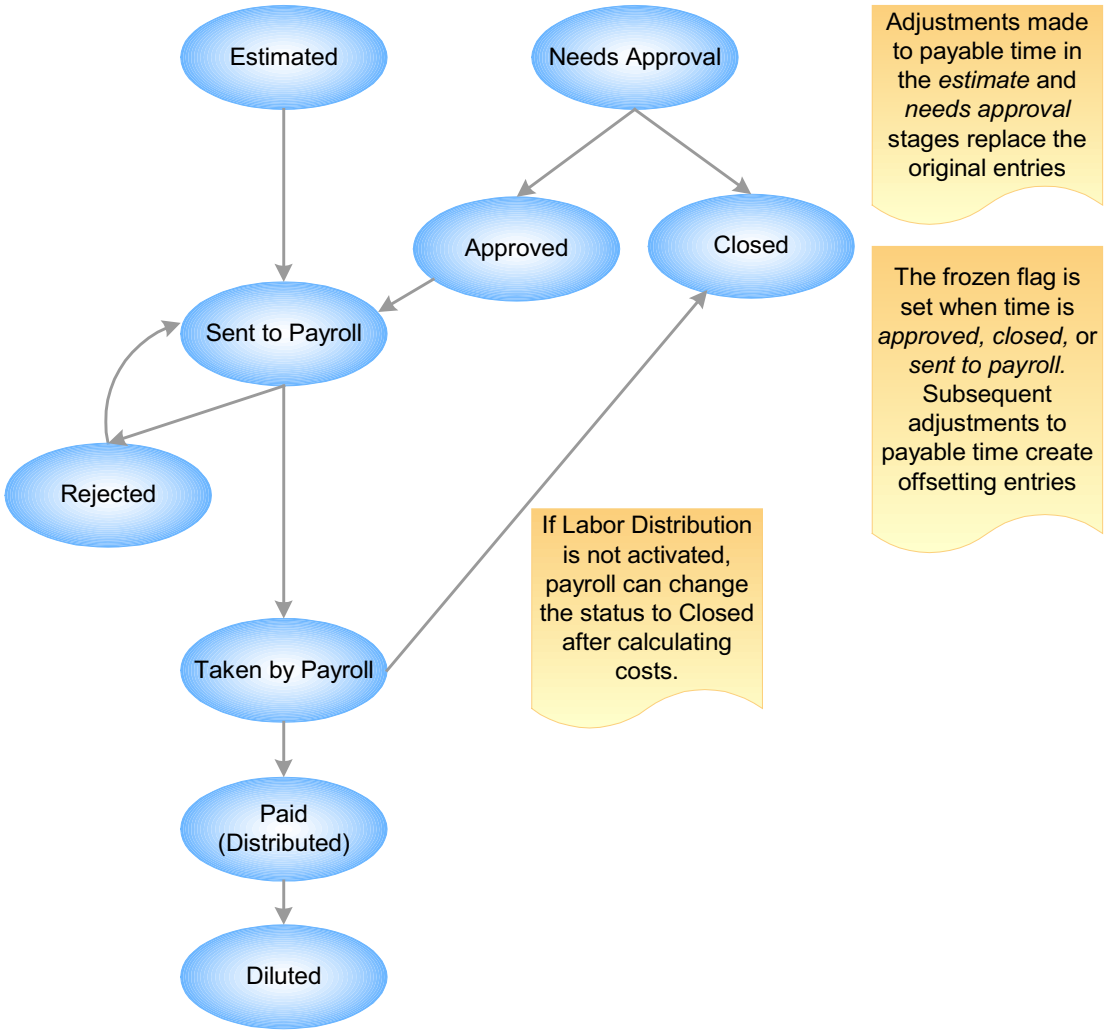
- *Payable status.* Payable time goes through many stages, most of which relate to the transmission of payable time records from PeopleSoft Time and Labor to your payroll system, as well as the transmission of cost data from your payroll system to Time and Labor. Payable status records the progress of payable time through these stages.

- *Frozen flag.* 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 results in the replacement of the original entry by the new entry. An adjustment made after the frozen flag is set causes 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 your payroll system or published 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

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 cause 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.
Online estimate	This is estimated payable time that was created by launching the online rules process from the Weekly Elapsed Time or Weekly Punch Time page. Once Time Adminstration is run, the status changes to Estimated or Needs Approval.	Not applicable.
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.
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.

Status	*Description*	*When Published?*
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.

See Also

"Integrating with PeopleSoft Financials," PeopleSoft Projects Integration

"Understanding Batch Processing in Time Administration," Step 10 - Processing Adjustments

Publishing Estimated and Actual Payable Time

This section describes how to:

- Publish payable time with estimated costs.
- Publish payable time with actual costs.

Publishing 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 calculates the estimated cost of payable time when you run the Time Administration process. At the same time, it assigns the entry a payable status of Estimate or Needs Approval.

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 replace any previously collected estimates with the data from PeopleSoft Time and Labor and not try to reconcile old and new estimates. 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.

Note. 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.

See Also

"Understanding Batch Processing in Time Administration," Calculate Estimated Gross

PeopleSoft Application Fundamentals for HRMS PeopleBook

Publishing Payable Time with Actual Costs

If you integrate PeopleSoft Time and Labor with your payroll system, the payroll system can calculate actual costs associated with payable time entries and send them back to Time and Labor. Closed, Distributed, and Diluted payable time entries reflect actual costs.

PeopleSoft Time and Labor automatically publishes Paid, Diluted, and Closed payable time after actual costs have been applied and after labor dilution.

If the payroll system must recalculate paychecks after the pay period is closed, it 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; Time and Labor publishes the difference between the original and new costs to PeopleSoft Projects.

Currency Codes in the Payable Time Table

The Payable Time Table (TL_PAYABLE_TIME), includes two fields for currency codes: 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 status. Because it does not go to a payroll system or does not get labor-distributed, the Currency Code 2 field is the same as Currency Code 1.

See Also

"Integrating with Payroll Applications"

"Integrating with PeopleSoft Financials"

Understanding Payable Time Fields

The following table lists the fields maintained for each entry of payable time in TL_PAYABLE_TIME:

Field Name	*Description*
Emplid	Employee identification number.
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 an authorized user or derived through rules.
Comp_RateCd	Alternate rate code to be used with this time. Entered directly by an authorized user or derived through rules.
Country	Country to be used with this time. Entered directly by an authorized user or derived through rules.
State	State to be used with this time. Entered directly by an authorized user 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 the Reported, Override_Rate and Est_Gross fields are stated.
Lbr_Dist_Amt	Actual gross from your payroll system, 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 fields are stated.
Payable_Status	Identifies the status for this time.
Pay_System	Payroll system that processed this entry.
Payroll_Req_Num	Sequential number of payroll requests.
Frozen_Sw	Indicates that this record will not be changed by Time Administration.
Frozen_Date	Date the frozen flag was set.
Record_Only_Adj	Record only adjustments.

Field Name	*Description*
Publish Sw	Indicates if the row was published.
Actual_Pub_Date	Date published as the 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.
SetID_Dept	Department set ID.
SetID_Resource	Resource set ID.
SetID_Activity	Activity set ID.

Generating Payable Status 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. (Entries with a payable status of *Online Estimate* are excluded.) You can also choose the language in which the report is produced.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

CHAPTER 14

Reporting Time

This chapter provides an overview of time reporting and discusses how to:

- Create time reporting templates.
- Create templates for rapid time reporting.
- Enter rapid reporting time.

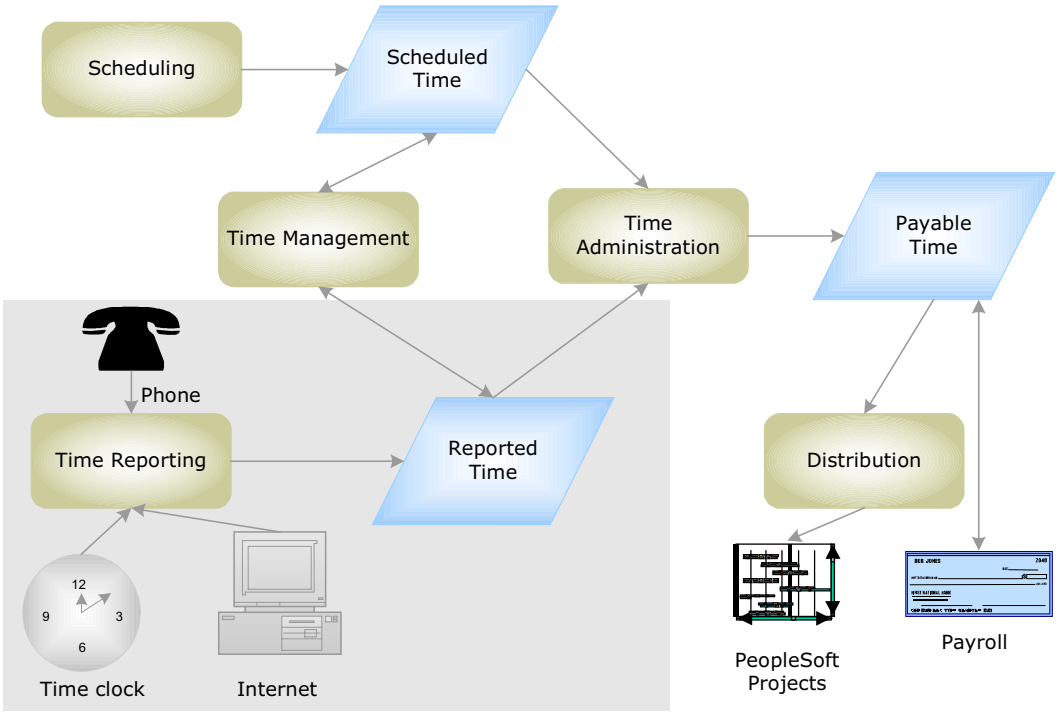
Understanding Time Reporting

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. PeopleSoft Time and Labor can also generate time automatically through the use of schedules.

Note. 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.

View and modify all time entries—regardless of their source—using the PeopleSoft Time and Labor 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

See Also

"Integrating with PeopleSoft Financials," PeopleSoft Expenses with Mobile Time and Expense

Creating Time Reporting Templates

This section discusses how to create time reporting templates. 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.

Understanding Time Reporting Templates

You design the time reporting pages. Use the Time Reporting Template page to select the fields 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, use the task template rather than the time reporting template. Attach the task template to the time reporting template. This

feature enables 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 reporting time, 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.

Note. You must create time reporting templates before you can create taskgroups.

Assigning Pre-defined Time Reporting Templates

If you want minimal information from time reporters, 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. Users of this template are 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). Users of this template are prompted for daily units. The time reporting code is set by default to REG.

See Also

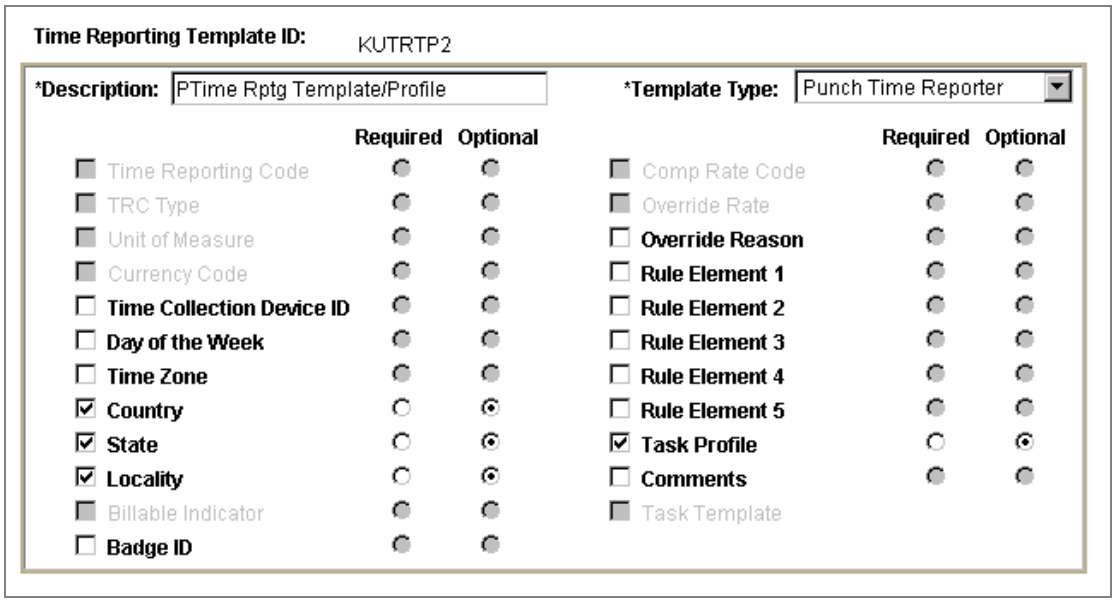
"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data

Page Used to Create Time Reporting Templates

Page Name	*Object Name*	*Navigation*	*Usage*
Time Reporting Template	TL_RPTD_TMPLT1	Define Business Rules, Define Time and Labor, Setup 1, Time Reporting Template	Specify time-related fields to display on the punch or elapsed time entry pages.

Specifying Fields to Display on the Punch or Time Entry Pages

Access the Time Reporting Template page.



Time Rptg Template 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 available elements depend on whether the template applies to elapsed time reporters or punch time reporters.

Time Reporting Code This check box is available only when you select ***Elapsed Time Reporter*** in the **Template Type** field. The default value is ***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 available only when you select an Elapsed Time Reporter template type. The default value is ***Optional.*** Select this option 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 automatically selects Time Reporting Code.

Unit of Measure This check box is available only when you select an Elapsed Time Reporter template type. The default value is ***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 available only when you select an Elapsed Time Reporter template type. The default value is ***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. The default value is ***Required.*** Select this check box if you are interfacing with a third-party time collection device. The system displays the ID of the time collection device to which the time was reported.

Day of Week This check box is available only when you select a Punch Time Reporter template type. The default value is ***Optional.*** Select this option to display the day of the week when the user enters a date on the Punch Time Entry page.

The day of the week automatically appears above the date on the Elapsed Time Entry page.

Time Zone This check box is available only when you select a Punch Time Report template type. The default value is ***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. The default value is ***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. The default value is ***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 can then 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. The default value is ***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 available only when you select an Elapsed Time Reporter template type. The default value is ***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 is passed to Projects.

Badge ID

This check box is available for both the Elapsed Time Reporter and Punch Time Reporter template types. The default value is ***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 available only when you select an Elapsed Time Reporter template type. The default value is ***Required.*** Select this 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 available only when you select an Elapsed Time Reporter template type. The default value is ***Required.*** Select this 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 is passed to the payroll system for use in pay calculations. Otherwise, the override rate is set by 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. The default value is ***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 define override reason codes on the Override Reason Code page.

Rule Element 1-5

These check boxes are available for both elapsed and punch time reporters. The default value is ***Required.*** Select these check boxes 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 Rules Element pages.

Task Profile

This check box is available only if the **Task Template** check box is cleared. The default value is ***Required*** and causes a Task Profile drop-down list box to appear on the weekly or punch time reporting page.

The task profiles that appear in the drop-down list box 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.

Comments

This check box is available for both the Elapsed Time Reporter and Punch Time Reporter template types. The default value is ***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 available only if the **Task Profile** check box is cleared. The default value is ***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.

See Also

"Integrating with PeopleSoft Financials," PeopleSoft Projects Integration

"Defining Task Reporting Requirements"

Creating Templates for Rapid Time Reporting

This section discusses how to create templates for rapid time reporting.

Understanding Rapid Time Reporting

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.

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 to select the fields to include on the Rapid Time Reporting page.

Create 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 in the following table.

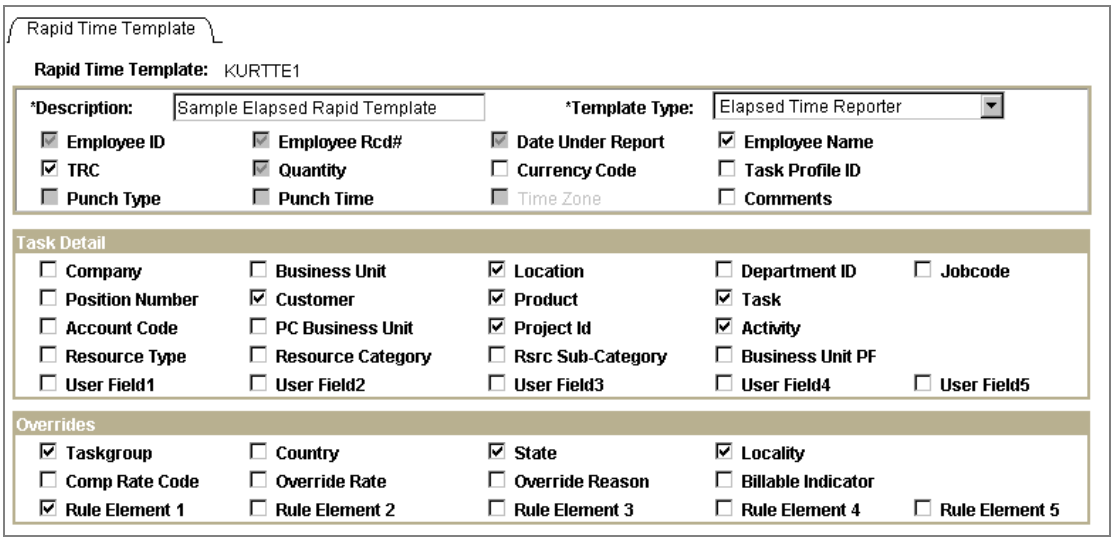
Field Name	*Table*
Task Detail fields	Various. See "Defining Task Reporting Requirements."
TRC (time reporting code)	TRC
Time Zones	TIMEZONE
Quantity	TL_QUANTITY
Task Profile ID	TASK_PROFILE_ID
Currency Codes	CURRENCY_CD
Taskgroup	TASKGROUP
Rule Elements	RULE_ELEMENT_1 (2, 3, 4, or 5)
Comp Rate Code	COMP_RATECD
State	STATE
Locality	LOCALITY
Override Reason	OVERRIDE_RSN_CD

Page Used to Create Templates for Rapid Time Reporting

Page Name	Object Name	Navigation	Usage
Rapid Time Template	TL_RAPID_TMPLT1	Define Business Rules, Define Time and Labor, Setup 1, Rapid Time Template	Select the fields to appear on the Rapid Time Reporting page.

Selecting Fields to Display on the Rapid Time Reporting Page

Access the Rapid Time Template page.



Rapid Time Template page

Description Enter a description of up to 30 alphanumeric characters for the template. This is a required field.

Template Type Select ***Punch Time Reporter*** or ***Elapsed Time Reporter*** to indicate the type of time reporter the template applies to.

Employee ID This 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) This check box is selected automatically to indicate that a field for employee record number appears on the Rapid Time Reporting page if you enable 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. This 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 this check box.

TRC (time reporting code) — This check box is available only when you select ***Elapsed Time Reporter*** in the **Template Type** field. If you select this check box, a TRC field appears on the Rapid Time Reporting page.

Quantity — This check box is available only when you select ***Elapsed Time Reporter*** in the **Template Type** field. It is automatically selected and indicates that a Quantity field is included on the Rapid Time Reporting page. The user can supply hours, units, or an amount when reporting time.

Currency Code — This check box is available only when you select ***Elapsed Time Reporter*** 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 this check box if you want the Rapid Time Reporting page to include a Task Profile ID field. The system refers to the time reporter's task profile to determine how to allocate the reported time across tasks.

If you select this check box, you cannot select individual tasks from the Task Detail group box on this page.

Punch Type — This check box is available only when you select ***Punch Time Reporter*** in the **Template Type** field. It is automatically selected and indicates that a Punch Type field appears on the Rapid Time Reporting page. The user can select *Break, In, Meal, Out,* or *Transfer* from a drop-down list box.

Punch Time — This check box is available only when you select ***Punch Time Reporter*** in the **Template Type** field. It is automatically selected and indicates that a Punch Time field is included on the Rapid Time Reporting page.

Time Zone — This check box is available only 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 this check box if you want the Rapid Time Reporting page to include a field for a country code. Users can select a country when reporting time. This check box is required when you select the **State** and **Locality** check boxes in the **Overrides** group box.

Comments — This 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 select the **Task Profile ID** check box, you can select the task-related data entry fields that you to want to appear on the Rapid Time Reporting page.

Note. 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 initiates exceptions.

Overrides

Use this group box to select additional fields to appear on the Rapid Time Reporting page. If a user completes any of these fields when reporting time, the entered values override default values defined elsewhere in PeopleSoft Time and Labor or Human Resources Management.

Taskgroup — Select this check box if you want a Taskgroup field to appear on the Rapid Time Reporting page. Users can override the time reporter's default taskgroup when entering time. The system uses 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 is 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 this check box to have a State field appear on the Rapid Time Reporting page. Users can 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 this check box, you must also select the **Country** check box.

Locality

This check box is similar to the **State** check box. Select this check box 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 this check box, you must also select the **Country** and **State** check boxes.

Comp Rate Code (compensation rate code)

This check box is available only when you select ***Elapsed Time Reporter*** in the **Template Type** field. If you select this check box, the time-entry clerk can 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

This check box is available only 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 is 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

This check box is available only 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 is passed to Projects.

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.

See Also

"Creating Rules in Time Administration," Defining Rule Elements

"Setting Up Time Reporters," Understanding Time Reporter Data

"Defining Task Reporting Requirements," Understanding How to Create Task Values in Time and Labor

"Introduction to PeopleSoft Time and Labor," Default Processing

"Integrating with PeopleSoft Financials," PeopleSoft Projects Integration

Rapid Time Reporting

This section discusses how to report time.

Understanding Rapid Time Reporting

The Rapid Time Reporting page enables you to quickly enter time for multiple time reporters. No online edits or rules are applied during data entry, so that 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.

Submitting Reported Time for Validation

After you enter time on the Rapid Time Reporting page, 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 starts the Time Administration process, which converts the reported time to payable time.

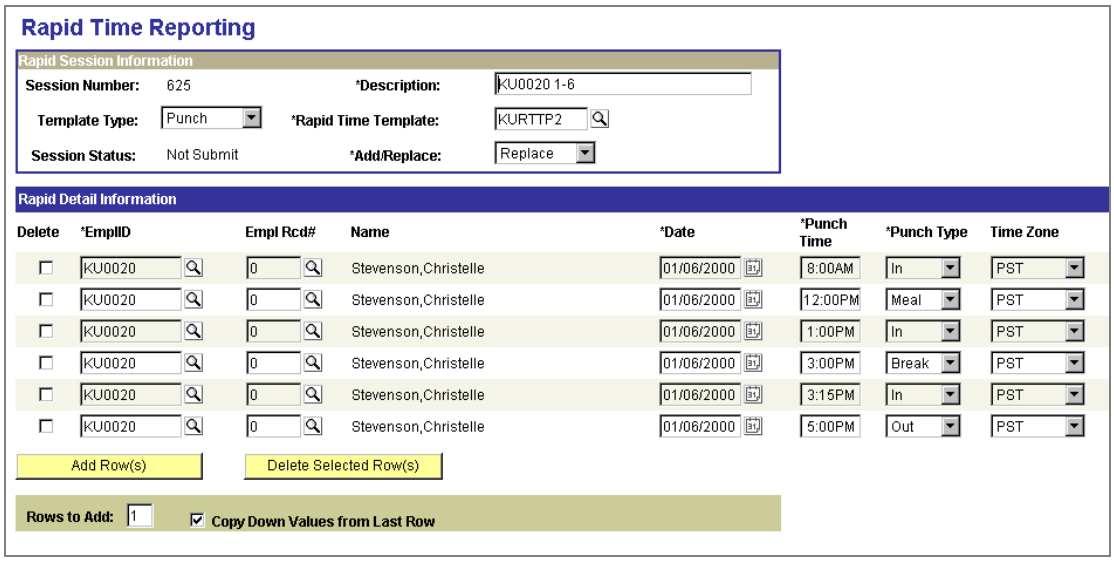
Note. If the rapid entry data includes task details that do not match the employee's task profile, the task details you entered are moved to the Reported Time table as long as they pass the validation process.

Page Used to Enter Rapid Reporting Time

Page Name	Object Name	Navigation	Usage
Rapid Time Reporting	TL_RAPID_SESSION	Administer Workforce, Capture Time and Labor, Use, Rapid Entry	Enter daily time quickly for time reporters and submit time for validation.

Entering Daily Time Quickly

Access the Rapid Time Reporting page.



Rapid Time Reporting page

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.

Template Type Select the template type: ***Elapsed*** or ***Punch***.

Caution. We recommend that you do not change the template type after saving data. Doing so causes the system to delete any data entered with the original template. Instead, create a new session with the desired template type. Similarly, if you change from one template to another of the same type (elapsed to elapsed), any of the data that does not match the current rapid template will be deleted upon the submission of the session.

Rapid Time Template

Select the rapid time template you want. The template determines which data entry fields appear in the Rapid Detail Information section.

Caution. If you select a different Rapid Time Template after you enter time, the system deletes any unsaved entries.

Session Status

Indicates whether you have run the Submit process to validate the time entries for the data entry session. Values are ***Submitted***, ***Not Submit***, ***Resubmit,*** and ***Submit TA*** (Time Administration).

Submit: Indicates that you submitted the session and the entries were validated.

Resubmit: Indicates that you modified a session that was previously submitted.

Submit TA: Indicates that you submitted the session and processed Time Administration automatically, as the Automatic Rules Run flag is enabled on the TL Installation page.

Note. If the system is unable to complete the Submit process because of an error, the session status still reads *Submit.* After fixing the problem, you can resume processing by selecting the Restart option on the Process Monitor.

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 (time that has a reported time source code equal to *SYS*) with the time you are entering now. Only time originating from those two sources is replaced by the new instance of time. Time that originated from any other source, such as the Weekly Elapsed Time page, Time Clock Device, or Global Payroll, is not changed. For example, when reporting rapid elapsed time and the Add/Replace indicator is set to *Replace,* the system replaces all the elapsed time that exists for an employee on that same date that originated from either the Mass Time Reporting or Rapid Time Reporting pages. It does not affect any punch time that may exist. Likewise, when reporting rapid punch time, the system replaces all punch time meeting the same criteria and does not delete any elapsed time.

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).

See Also

PeopleTools PeopleBook: Process Scheduler, Viewing the Status of Your Process

Rapid Detail Information

The fields that appear in this section 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 need access to the various codes you'll enter, including the time reporting codes, task, and override values.

Note. 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 initiates exceptions.

Save — Click this button to save the session. The system assigns a session number that replaces ***9999999999.***

After you save a session you can exit the page, return later, and enter additional rows of data for the session.

Submit — Click this button to validate the data you've entered. When you click this 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 appears. If you are updating a session, the date and time that data was last saved for the session appears.

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 after 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.

Note. To delete rows of rapid time that have been submitted, use the Weekly Elapsed Time or Weekly Punch Time page.

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.

After time has been submitted, you can also view time by employee ID and date using either the Weekly Elapsed Time page or the Weekly Punch Time page.

See Also

Selecting Fields to Display on the Rapid Time Reporting Page

CHAPTER 15

Using Time Collection Devices (TCDs)

This chapter provides an overview of time collection devices and describes how to:

- Understand TCD setup and data integration.
- Define TCD setup data in PeopleSoft Time and Labor.
- Send setup data to a TCD.
- Receive time from a TCD.
- View and resolve TCD errors.

Understanding Time Collection Devices

PeopleSoft Time and Labor's time collection process enables you to control how the system collects and sends time-related information to and from time collection devices (TCDs).

You can collect clock (punched) and elapsed time from any TCD for processing through PeopleSoft Time and Labor. You can send 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 supports scheduling, reporting, managing, and applying rules for this method of time reporting.

Many TCD time reporters perform the same tasks, and their cost allocation data remains static. Using the TCD interface, time reporters can swipe their badges when they start and stop working without setting up task data. The time reporter's default task profiles, as 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 download their time to a server; that time is routed to PeopleSoft Time and Labor.

PeopleSoft Time and Labor uses schedules and restriction profiles to determine when a time reporter is scheduled to punch in and out for work, meals, and breaks, and to determine when to allow or disallow punches.

You can group TCD information to use when enrolling time reporters into PeopleSoft Time and Labor, so that a time reporter can punch to all the clocks required for the job. For example, a time reporter may need to punch to clock A when performing shipping tasks, and then may need to punch to clock B when performing warehouse tasks.

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.

Understanding the TCD Interface and Referential Integrity

When you change one area of the application, referential integrity ensures that changes do not adversely affect another area of the application. The system checks for retroactive changes to effective-dated setup data or time-reporter-related data that could invalidate related objects or values.

The following sections describe referential integrity actions when certain changes, inactivations, or deletions are made during TCD processing.

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 with 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 the 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

See Also

"Introduction to PeopleSoft Time and Labor," Referential Integrity

Understanding TCD Setup and Data Integration

When setting up a TCD, you identify a generic set of input data that is sent to your TCD systems. 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.

You determine the frequency in which you pass data between the TCD and PeopleSoft Time and Labor; you should schedule the process to run on a regular basis.

Note. You do not need to set up TCDs if you use PeopleSoft Mobile Time and Expense. Mobile Time and Expense sends messages to PeopleSoft Time and Labor by time reporter ID; these messages contain elapsed time that Time and Labor sends to a pay system and to PeopleSoft Projects. Mobile Time and Expense does not accept setup data from Time and Labor.

To set up a TCD, you need to:

- Create a TCD configuration in PeopleSoft Time and Labor, as described later in this section.
- Make sure your messages are active.
- Set up the 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 needs to map to the PeopleSoft codes that will be displayed on the TCD.
- Establish flat file or Extensible Markup Language (XML) data integration information.

Understanding XML Integration

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.

To set up XML integration:

1. Ensure that the messages are active. This is found in Application Designer message properties.
2. Make sure message nodes have been created in Application Designer.

   Each comm server is associated with a message node.
3. Put the message nodes 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.”

Understanding Flat File Integration

If you use flat file integration, the TCD writes a flat file of reported time to a common directory. The file is picked up and converted to a message by PeopleSoft Time and Labor. These system messages are enterprise integration points that send time data back and forth from PeopleSoft Time and Labor to your TCD.

Flat files should be 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 corresponds to a flat file format. All flat files generated are in the CSV (comma-separated value) format. Quotation marks surround each field of data. The first row of each PeopleSoft-generated file is the PSCAMA record. This recordcontains the message sequence and process instance.

The first field of each row is the name of that row’s record; this allows 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 allows split files to have data that ties them together. For example, if the TIME_DEVICE_EMPL_ATT_FULLSYNC flat file becomes too large, it is split into multiple files with the same process instance.

If a TIME REPORTERS record with fields EMPLID and EMPL_RCD, and a child record EMPL_PHONE with fields EMPLID, EMPL_RCD, and PHONE_NBR are 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",""
```

The first field of all rows is the record name. The process instance is the same for the header, detail, and trailing message.

Files generated by PeopleSoft Time and Labor for the TCD are the form [message name]-[comm server ID]-[datetime of form ccyy_mm_dd_hh_mm_ss].csv . Each part of the filename is separated by a hyphen. These files are always new; PeopleSoft Time and Labor will never append to an existing file. Once a file has been processed by the comm server, you should move it into an archive directory.

Files generated by the comm server for the PeopleSoft Time and Labor should be of the form [message name]-[comm server].csv. The comm server should always append to the end of the file. Once PeopleSoft has processed the data, it is 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 file is placed in an archive directory.

Flat file directories are part of PeopleSoft Time and Labor setup. The TCD vendor should have a similar type of setup, so that none of the programs have hard-coded path names.

The most seamless flat file integration should be completely controlled by scheduled processes. Process schedulers exist on the PeopleSoft side and should also exist on the TCD vendor side. At a specified time, a scheduled process polls 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 that 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 2 a.m. every morning, while PeopleSoft's extraction of data from these files could be at 4 a.m. 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.

To set up flat file integration:

1. Ensure that the messages are active. This is found in Application Designer message properties.

2. Verify that one of the nodes on the PUNCHED_TIME and ELAPSED_TIME message channels is the local node.

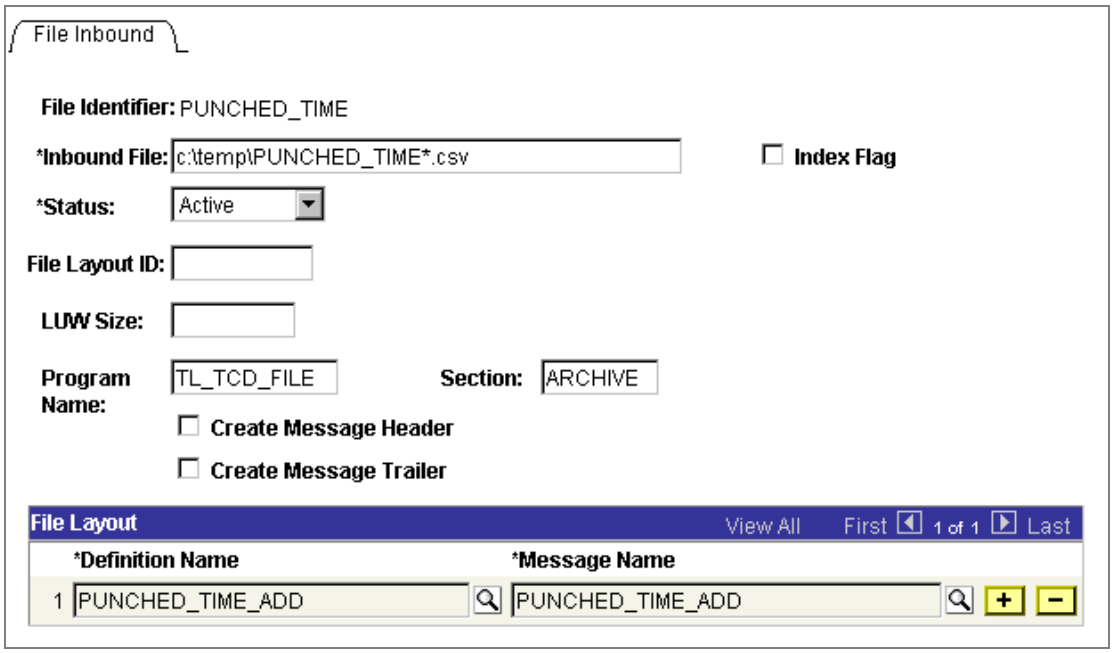
   Check the message node properties. Ensure that the routing direction for the local node is "Both Publish and Subscribe."

3. Set up the inbound file rule on the File Inbound page (Define Integration Rules, Manage Integration Rules, Inbound File Rule).

4. Make sure that the selected directory will contain the elapsed or punch time files.

   Your publish rules should look similar to the following: 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.

The following illustration shows an example of this setup.



Using File Inbound page to set up flat file integration

The comm server attached to your TCD creates and continually appends to 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. If the time is error-free, the rows are located in Reported Time. If the time is invalid, the message is displayed on the TCD error queue.

Note. If the data from your TCD is in flat file format and the value is in character format for a numeric field, the default character is zero (0). If a value is sent in a numeric format for a character field, the system adds that value into the field. If the data from your TCD is in XML format, the message including invalid formats for the fields is stopped in the Application Message Monitor.

You need to make sure the information you send is in the correct format 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 uses a default time reporter record number of zero. This is a valid value, so you will need to be sure the proper time reporter record number is entered before sending the information to PeopleSoft Time and Labor.

See Also

"Integrating with PeopleSoft Financials," PeopleSoft Expenses with Mobile Time and Expense

Defining TCD Setup Data in PeopleSoft Time and Labor

This section describes how to:

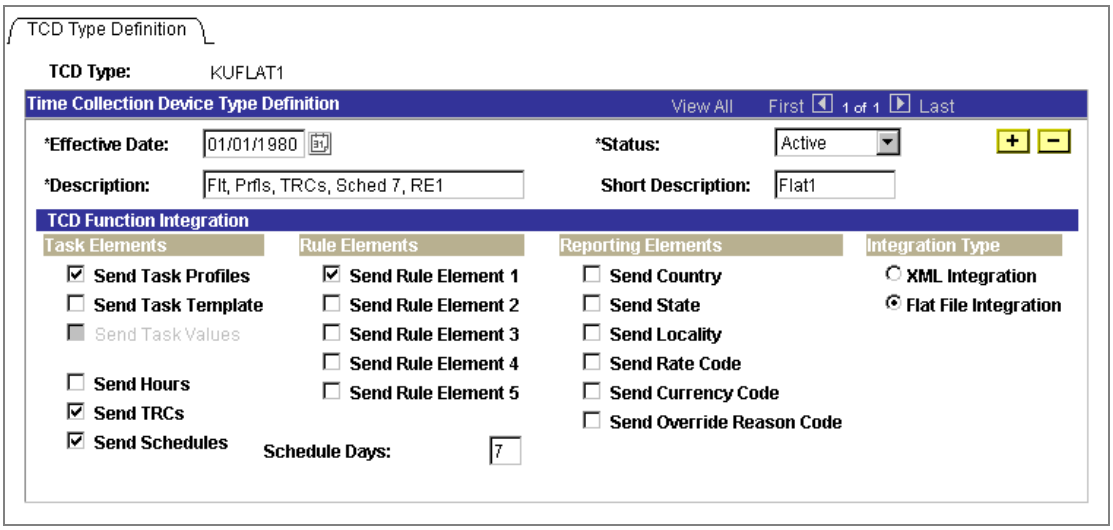
- Establish data elements to send to a TCD.
- Establish information about a TCD.
- Specify physical and taskgroup information for a TCD.
- Establish TCD supervisors.
- Establish restriction profile data.
- Set up TCD groups.

Pages Used to Define TCD Setup Data in PeopleSoft Time and Labor

Page Name	*Object Name*	*Navigation*	*Usage*
TCD Type Definition	TL_TCDDEF_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Type Definition	Select data elements to pass from PeopleSoft Time and Labor to a TCD.
TCD Setup	TL_TCD_SETUP_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Setup	Establish basic information about a TCD.
TCD Taskgroup	TL_TCD_TSKGRP_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Taskgroup	Specify physical and taskgroup information for a TCD.
TCD Supervisor	TL_TCD_SUPERV_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Supervisor	Establish supervisors allowed to perform TCD functions.
TCD Restriction Profile	TL_RESPRF_TBL_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Restriction Profile	Establish restriction profile data. Your TCD uses this information to determine when to allow or disallow punches.
TCD Group	TL_TCDGRP_PNL	Define Business Rules, Define Time and Labor, TCD, TCD Group	Establish TCD groups for time reporting purposes.

Establishing Data Elements to Send to a TCD

Access the TCD Type Definition page.



TCD Type Definition page

Task Elements

Send Task Profiles Select to send valid task profiles from PeopleSoft Time and Labor to your TCD.

The system only extracts and sends task profile records that are defined as Send to TCD. Valid task profiles are derived from taskgroups associated to your TCD.

Send Task Template Select to send valid task templates 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. Valid templates are derived from taskgroups associated to your TCD.

Note. If you use task template reporting but do not want to present a list of templates for time reporters to select from, the system sends a default task template for each time reporter message. This default provides the ability to automatically prompt for task elements based on the time reporter at your TCD.

Send Task Values Select to send task values to your TCD. This option is only available if you select **Send Task Templates.**

Task values correspond to 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.

Send Hours

Select 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 sent payable time hours with TRCs are for the beginning of the time reporter's current period up to the current date.

Send TRCs

Select to send time reporting codes (TRCs) to your TCD.

The system only extracts and 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.

Note. You may need to convert character codes to numeric codes before you can use them, depending on your TCD's requirements.

Send Schedules

Select to send schedules to your TCD.

Schedule information comes from the Schedule table. The system sends time reporters' daily punch schedules to your TCD. Your TCD uses this information to determine when time reporters are 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. You'll need to determine how to assign schedules in coordination with the holiday schedule.

You must select this check box to use restriction profiles with your TCD.

Note. This data structure contains multiple instances of schedules per day. If your TCD requires only one schedule record per day, you 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 TCD.

For each time reporter, the system sends today's punch schedule detail in addition to the number of days you define in this field. The limit is 99. If **Send Schedules** is clear, this field is unavailable for entry.

Rule Elements

Send Rule Element 1-5 — Select to send values from the Rule Element tables one through five to your TCD.

Rule elements can be positively reported. They are special compensation elements that are used in building rules and in Time Administration. For example, if a rule element value 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.

Reporting Elements

Send Country, Select State, and **Select Locality** — Select to send a list of country, state, and locality names to be positively reported with time.

The system uses the default country, state, or locality defined on the TCD if one is not positively reported.

Note. At table change time, there is no way for PeopleSoft Time and Labor to determine if the country, state, or locality was positively reported or if the default value was used. As a result, the system cannot perform any referential integrity actions on these fields if there are changes.

Send Rate Code — Select 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 to send a list of valid currency codes to be reported at the TCD.

Send Override Reason Code — Select to send codes from the Override Reason Code page.

Integration Type

XML Integration — Select if you are using XML integration.

Flat File Integration — Select 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.

Note. If the country, state, or locality contained in the inbound interface are different from the TCD setup default, then the inbound interface automatically populates those fields 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 perform any referential integrity actions on these fields if there are changes.

See Also

"Establishing Time Reporting Codes"

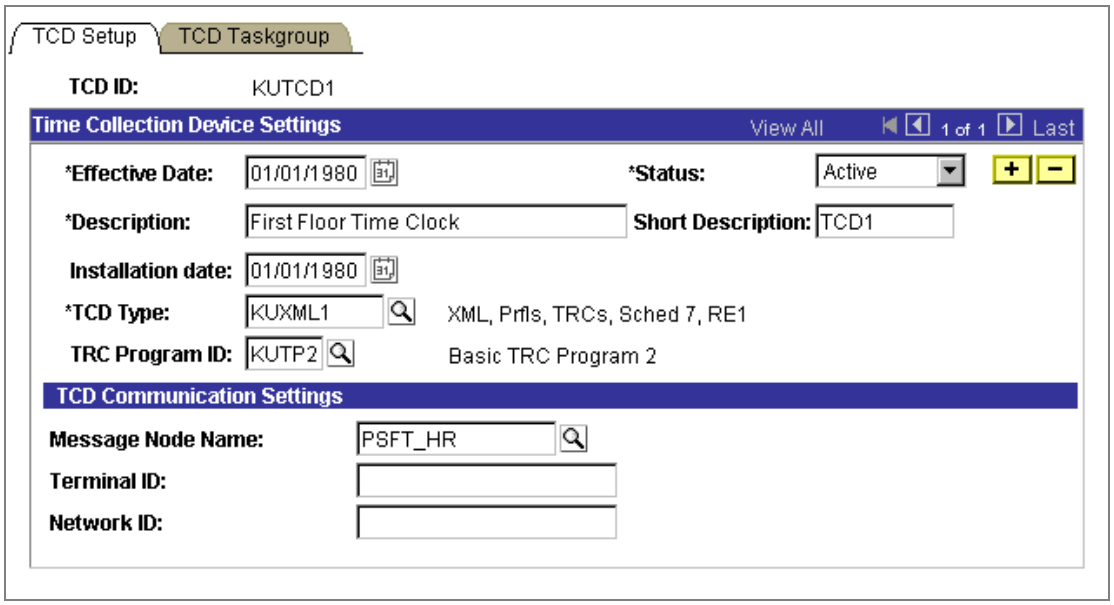
"Defining Task Reporting Requirements"

"Creating Rules in Time Administration," Defining Rule Elements

"Setting Up Basic Tables," Understanding Time and Labor Implementation

Establishing Basic Information About a TCD

Access the TCD Setup page.



TCD Setup page

Installation Date Select the date your TCD was installed. Used for your reference only.

TCD Type Select the TCD type. 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.

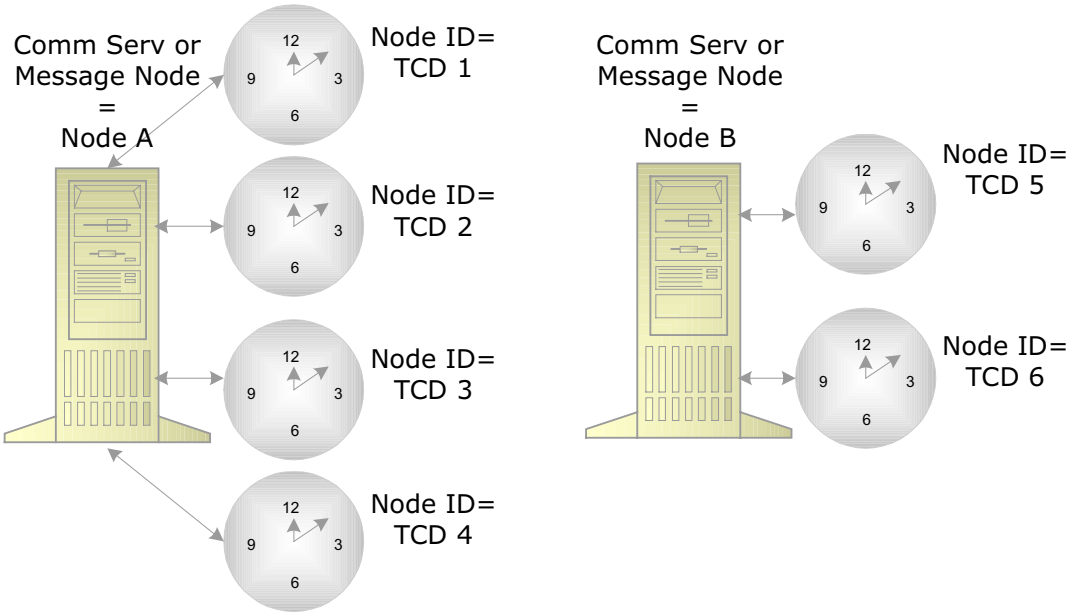
Note. Only TRCs in the TRC Program that are defined as Send to TCD are sent to your TCD.

Message Node Name	Enter the message node or comm serv ID to which you want to send TCD information. The field changes based on the TCD type you selected. A comm serv ID is used for flat file integration. A message node is used for XML integration; it uses PeopleSoft Application Messaging technology.
Terminal ID	Enter the ID you use for your TCD. The value depends upon your system configuration. This field is required if your TCD is configured like Configuration 2 illustration following this table.
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 Configuration 3 illustration following this table.

Use the following diagrams to determine which communication settings you need.

Communication Settings

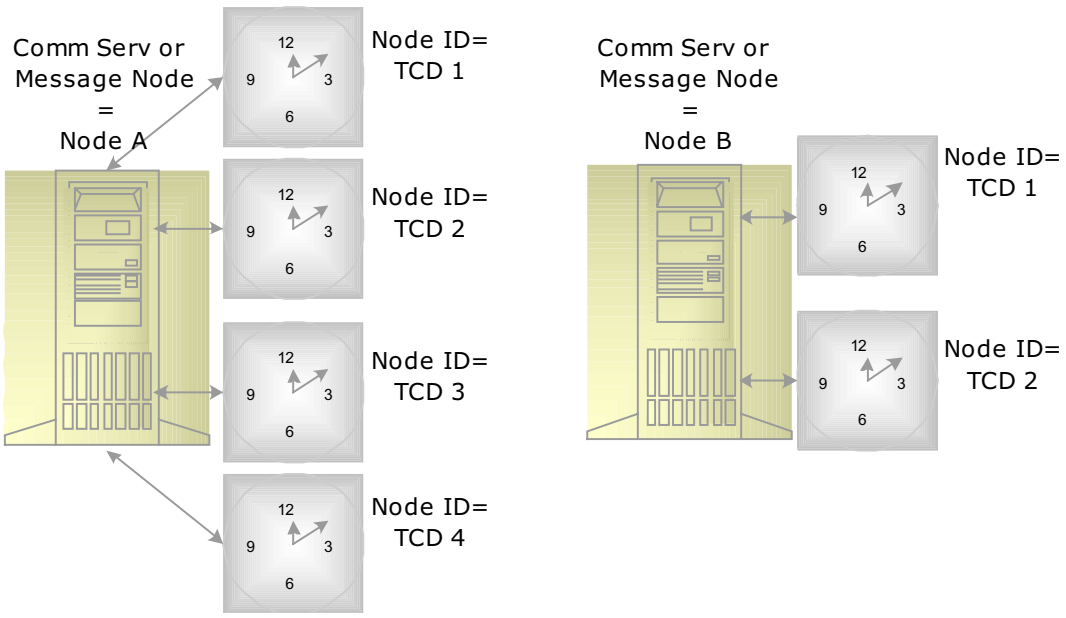
If you uniquely identify your Terminals throughout your entire system, then only Comm Serv/Message Node is required.



Configuration 1: - A comm serv/message node ID is required

Communication Settings

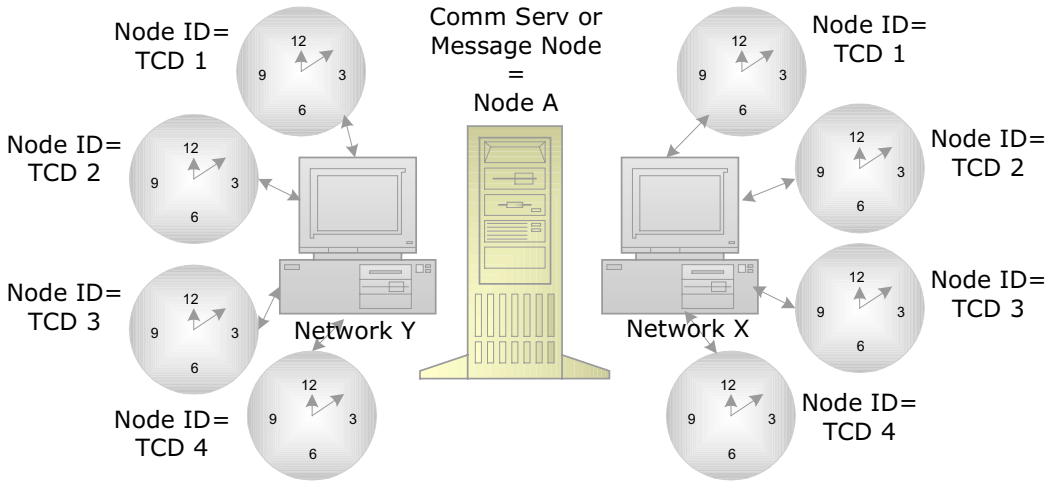
If you do not uniquely identify your Terminals throughout your entire system and the picture below is representative of your configuration, then both Comm Serv/Message Node and Terminal ID are required.



Configuration 2: Comm serv/message node and terminal IDs are required

Communication Settings

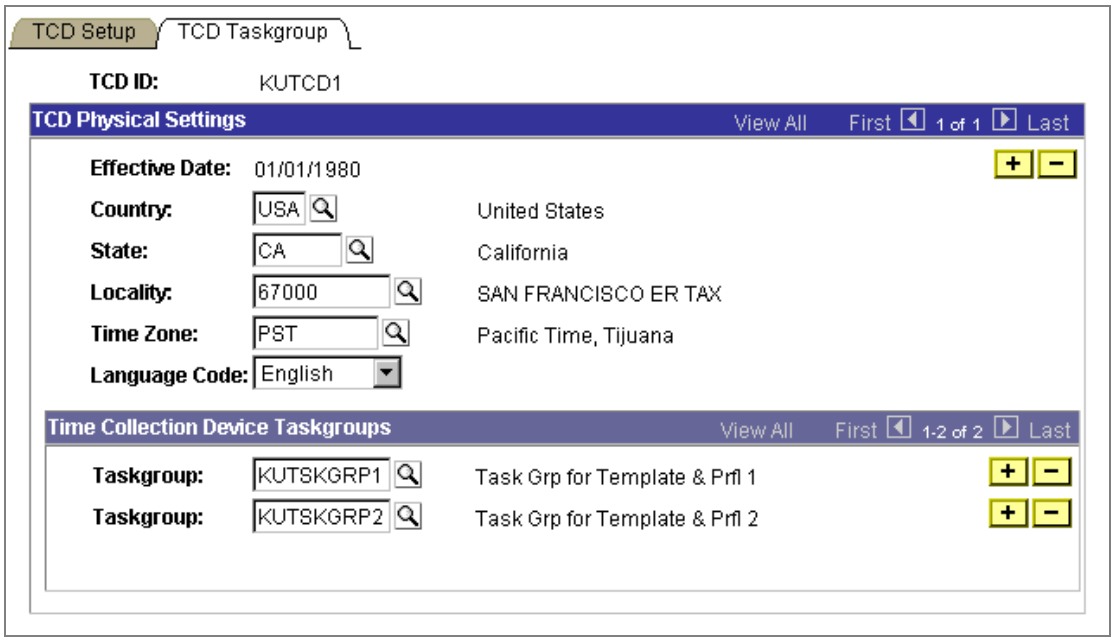
If you do not uniquely identify your Terminals throughout your entire system and the picture below is representative of your configuration, then all Communication Settings are required.



Configuration 3: All communication settings are required

Establishing Physical and Taskgroup Information for a TCD

Access the TCD Taskgroup page.



TCD Taskgroup page

TCD Physical Settings

Country, State, and **Locality** Select the country, state, and locality where this TCD is located.

Note. Country, state, and locality can be positively reported using the Punch or Elapsed Time Interface. If they are not positively reported, the system populates the time records with these values. If the values are not established here, the system does not pass any values at all to Time Administration. The receiving payroll system will have to get the default country, state, and locality.

TimeZone Select the time zone where this TCD is located.

The system uses the time zone for punch time reporting. If a time zone is not reported or it isn't validated during the TCD Interface process, the system looks for the time zone defined here. If a time zone isn't defined here, the system looks at the base time zone on the PeopleTools Options page, under Utilities.

Time Collection Device Taskgroups

Taskgroup

Select one or more taskgroups to send to your TCD.

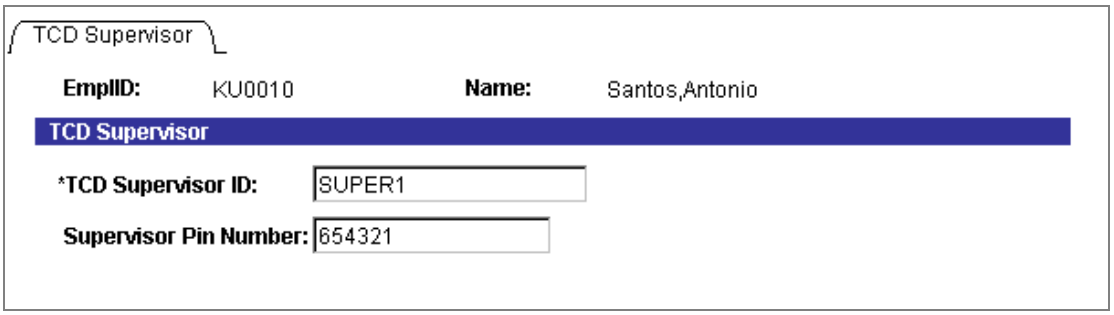
The system edits time reporter data to verify if the time reporter is assigned to a taskgroup that is associated to a TCD in the time reporter's TCD group. If a time reporter reports time to a taskgroup (task profiles or task values) that are not related to the taskgroup assigned to the time reporter, the taskgroup will be considered borrowed.

See Also

"Defining Task Reporting Requirements," Defining Taskgroups

Establishing TCD Supervisors

Access the TCD Supervisor page.



TCD Supervisor page

TCD Supervisor ID

Enter a unique supervisor ID.

You assign supervisors to TCDs on the TCD Group page.

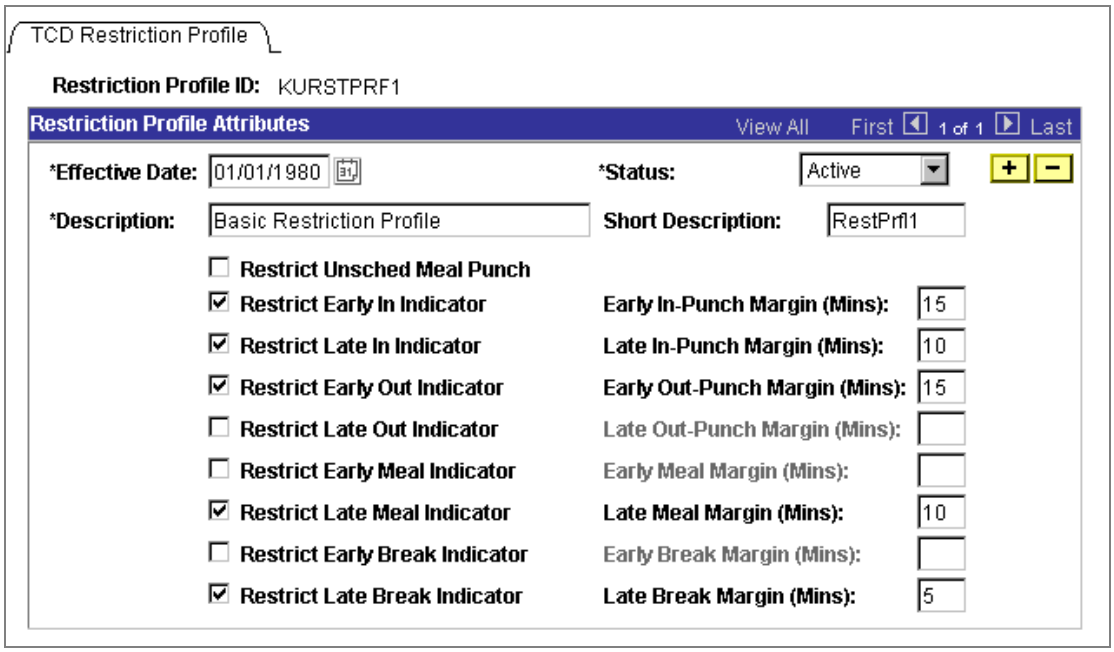
Supervisor Pin Number (supervisor personal identification number)

Enter a PIN associated with the supervisor ID.

This ID could be the password used to access the TCD to override a punch or function.

Establishing Restriction Profile Data

Access the TCD Restriction Profile page.



TCD Restriction Profile page

Restrict Unsched Meal Punch (restrict unscheduled meal punch) Select to restrict a time reporter from punching out for an unscheduled meal.

Restrict Early In Indicator Select to restrict a time reporter from punching in early.

Early In Punch Margin (Mins) (early in punch margin [minutes]) Enter the number of minutes you will allow a time reporter to punch in early. Unavailable if **Restrict Early In Indicator** is cleared.

Restrict Late In Punch Select to restrict a time reporter from punching in late.

Late In-Punch Margin (Mins) (late in punch margin [minutes]) Enter the number of minutes you will allow a time reporter to punch in late. Unavailable if **Restrict Late In Indicator** is cleared.

Restrict Early Out Indicator Select to restrict a time reporter from punching out early.

Early Out-Punch Margin (Mins) (early out punch margin [minutes]) Enter the number of minutes you will allow a time reporter to punch out early. Unavailable if **Restrict Early Out Indicator** is cleared.

Restrict Late Out Indicator Select to restrict a time reporter from punching out late.

Late Out-Punch Margin (Mins) (late out punch margin [minutes]) Enter the number of minutes you will allow a time reporter to punch out late. Unavailable if **Restrict Late Out Indicator** is cleared.

Restrict Early Meal Indicator Select to restrict a time reporter from punching out early for a meal.

Early Meal Margin (Mins) (early meal margin [minutes]) — Enter the number of minutes you will allow a time reporter to punch in early for a meal. Unavailable if **Restrict Early Meal Indicator** is cleared.

Restrict Late Meal Indicator — Select to restrict a time reporter from punching in late after a meal.

Late Meal Margin (Mins) (late meal margin [minutes]) — Enter the number of minutes you will allow a time reporter to punch in late after a meal. Unavailable if **Restrict Late Meal Indicator** is cleared.

Restrict Early Break Indicator — Select to restrict a time reporter from punching in early after a break.

Early Break Margin (Mins) (early break margin [minutes]) — Enter the number of minutes you will allow a time reporter to punch in early after a break. Unavailable if **Restrict Early Break Indicator** is cleared.

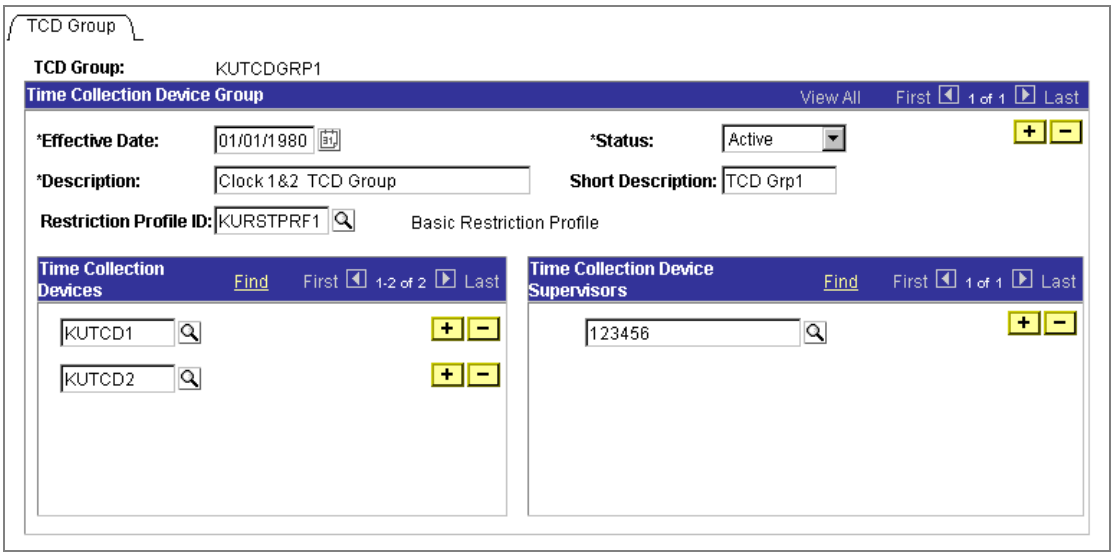
Restrict Late Break Indicator — Select to restrict a time reporter from punching in late after a break.

Late Break Margin (Mins) (late break margin [minutes]) — Enter the number of minutes you will allow a time reporter to punch in late after a break. Unavailable if **Restrict Late Break Indicator** is cleared.

Note. To use restriction profiles, you must set up punch schedules and select the **Send Schedules** check box on the TCD Type Definition page.

Setting Up TCD Groups

Access the TCD Group page.



TCD Group page

Restriction Profile ID Select a restriction profile ID that allows or disallows users to punch in and out.

Time Collection Devices

TCD ID (unlabeled) Select the IDs of the TCDs you want in this group.

Time Collection Device Supervisors

TCD Supervisor ID (unlabeled) Select the supervisor ID of the person who can perform supervisor functions for the TCDs in this group.

Sending Setup Data to a TCD

This section provides an overview of data publishing to a TCD and describes how to publish PeopleSoft Time and Labor setup data.

Understanding Data Publishing to a TCD

PeopleSoft Time and Labor sends (publishes) setup data to your TCD in the form of messages. The publish process can be scheduled to run once or multiple times a day. All information contained in one set of published messages replaces the previously stored information at the TCD level. The date the system uses to retrieve TCD information is always the current date.

Incremental messages are sent when time reporter data changes in PeopleSoft Time and Labor. Incremental messages are sent when you change:

- Time reporter status.
- The TCD group associated to the time reporter.
- The elements in a TCD group.

You can send the published messages to all or selected message nodes/comm servers.

Use the TCD Usage report to determine how many values of each kind of reporting element are sent to a TCD.

Enterprise Integration Points

The PeopleSoft Time and Labor TCD interface uses enterprise integration points (EIPs) along with PeopleSoft application messaging technology to send information between Time and Labor and your TCD. The system uses the following EIPs for this interface:

- 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

Note. To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of Customer Connection.

TCD Message Types

PeopleSoft Time and Labor uses the information you defined on the TCD setup pages to control the data going to your TCD. The following table summarizes the types of TCD messages.

Table	*Comment*
Time Reporter	Contains basic information about a time reporter.
Schedule	Contains a time reporter's daily schedules.
Restriction Profile	Contains restriction information from the TCD Restriction page.
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.

Table	Comment
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 labor information. Task templates also identify rule elements, which 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 codes, which a time reporter can override when reporting time.

See Also

Establishing Basic Information About a TCD

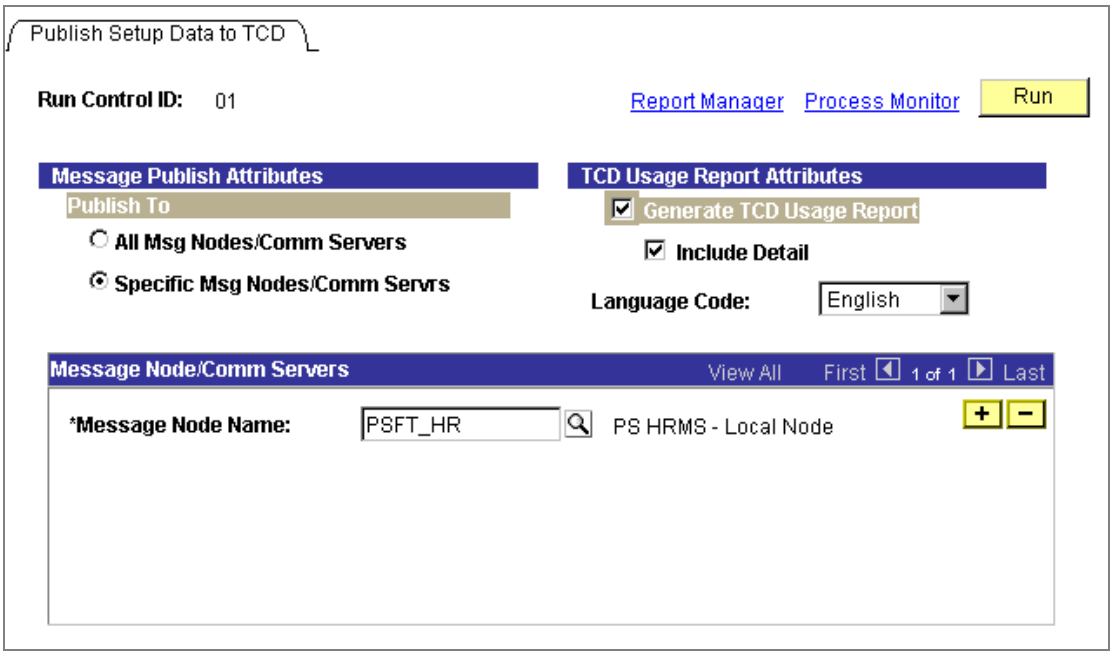
"Appendix C: TCD Interface"

Pages Used to Send Setup Data to a TCD

Page Name	Object Name	Navigation	Usage
Publish Setup Data to TCD	TL_TCD_RUN_PNL	Administer Workforce, Capture Time and Labor, Process, Publish Setup Data to TCD	Publish setup information for your TCD to retrieve from PeopleSoft Time and Labor.

Publishing Setup Data to a TCD

Access the Publish Setup Data to TCD page.



Publish Setup Data page

All Msg Nodes/Comm Servers	Select to publish the information to all your TCDs (message nodes).
Specific Msg Nodes/Comm Servrs	Select to send to a specific message node, or TCD.
Generate TCD Usage Report	Select to generate a TCD Usage report for this TCD run.
Include Detail	Select to generate a detail report for all the values being sent for this TCD run. Only available if **Generate TCD Usage Report** is selected.
Language Code	Select the language the report will be printed in.
Message Node Name	Enter a TCD (message node) to send the data to. Only available if **Specific Msg Nodes/Comm Servrs** is selected.

Receiving Time from a TCD

To receive time data from a TCD into PeopleSoft Time and Labor, you must initiate the Publish process. If errors are not found, the data proceeds directly to the Reported Time tables. The system validates the information by:

- Performing standard format edits.
- Translating badge IDs to employee IDs.
- Creating 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.

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 occur, the TCD error queue will stop time data from proceeding to the Reported Time tables if the following is invalid:

TCD Error Queue Stops if Invalid

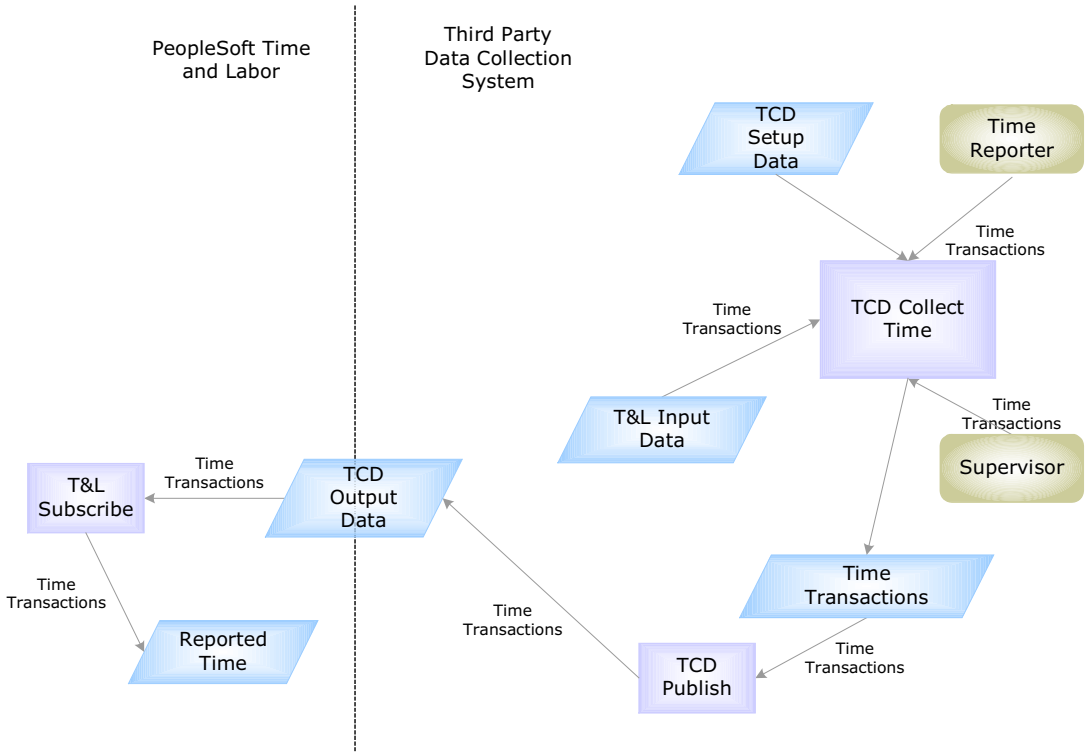
- EMPLID
- EMPL RCD
- BADGE ID
- TASK ELEMENT CODES
- DUR (Date Under Report)
- PUNCH DATE/TIME
- ADD/DELETE INDICATOR
- DELETE DATE

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. However, a blank value is sent for an invalid taskgroup.
- Task Element Values
- Time Zone
- Override Reason Code

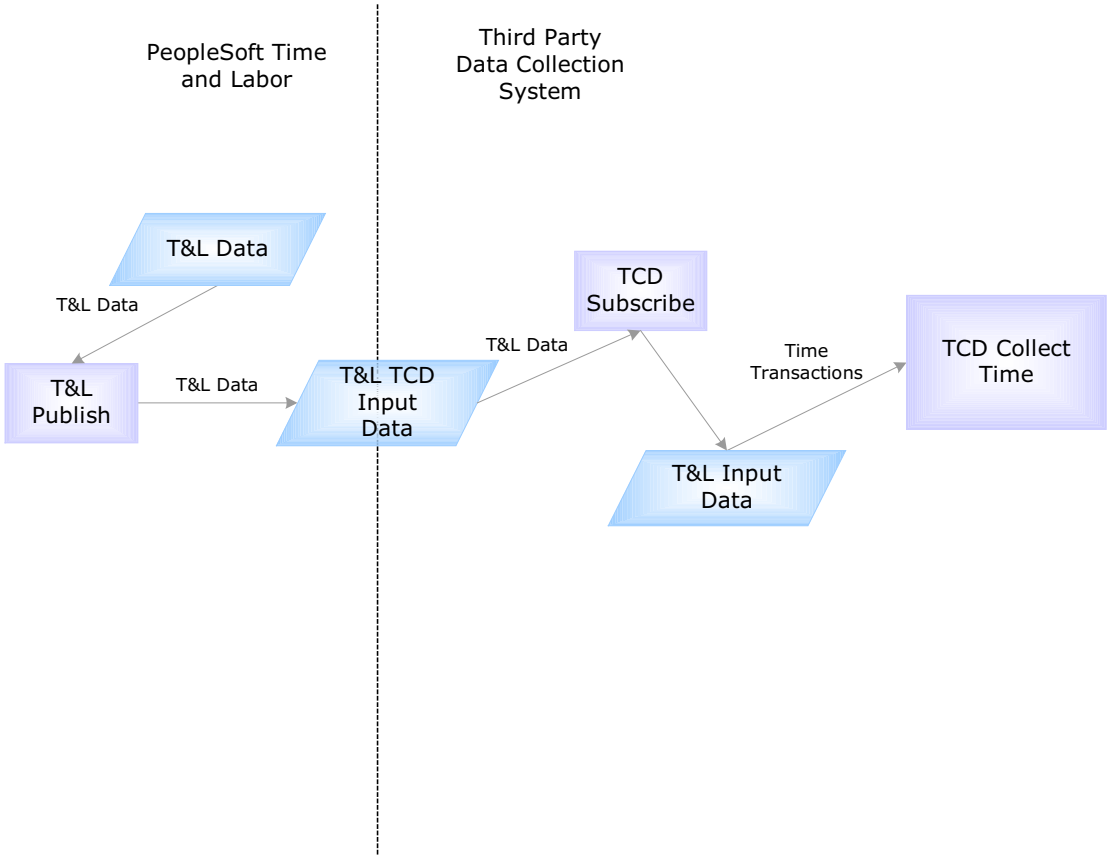
- Task Profile ID
- Location
- Country
- State
- Locality

The following illustration depicts how PeopleSoft Time and Labor collects data from a TCD.



PeopleSoft Time and Labor collects data from a TCD

The next illustration depicts how PeopleSoft Time and Labor publishes information to your TCD.



PeopleSoft Time and Labor publishes information to a TCD

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 the creation of payable time.

See Also

"Appendix B: Exceptions and Validations"

"Integrating With PeopleSoft Financials"

Viewing and Resolving TCD Errors

This section describes how to:

- View TCD errors.
- View and fix elapsed time errors.

- View and amend information elapsed time attributes.
- View and fix punched time errors.
- View and amend information punched time attributes.

Note. Fixing TCD errors requires detailed knowledge of the interface data structure.

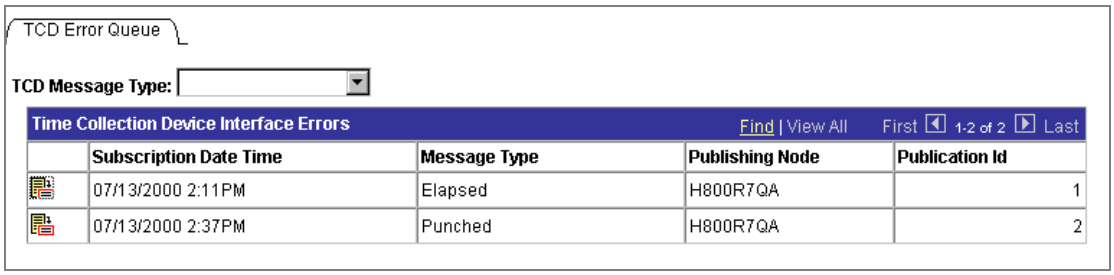
Pages Used to View and Resolve TCD Errors

Page Name	*Object Name*	*Navigation*	*Usage*
TCD Error Queue	TL_ERROR_QUEUE	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue	View TCD error messages.
TCD Elapsed Time Errors	TL_ELAPSED_ERROR	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue; click the TCD Error Detail icon in the Elapsed time row that you want to view.	View and fix elapsed time errors.
Elapsed Time Attributes	TL_ELAPSED_ERROR1	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue, click the TCD Error Detail icon in the Elapsed time row that you want to view, click the Elapsed Time Attributes tab.	View or enter additional information for elapsed time sent to PeopleSoft Time and Labor from your TCD.
TCD Punched Time Errors	TL_PUNCH_ERROR	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue; click the TCD Error Detail icon in the Punched time row that you want to view.	View and fix punched time errors.

Page Name	Object Name	Navigation	Usage
Punched Time Error Attributes	TL_PUNCH_ERROR1	Administer Workforce, Capture Time and Labor, Inquire, TCD Error Queue, click the TCD Error Detail icon in the Punched time row that you want to view, click the Punched Time Error Attributes tab.	View or enter additional information for punched time sent to PeopleSoft Time and Labor from your TCD.

Viewing TCD Errors

Access the TCD Error Queue page.



TCD Error Queue page



Click the **TCD Error Detail** icon to view TCD punch or elapsed time, and to view punch or elapsed time error attributes.

Subscription Date Time Displays when 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.

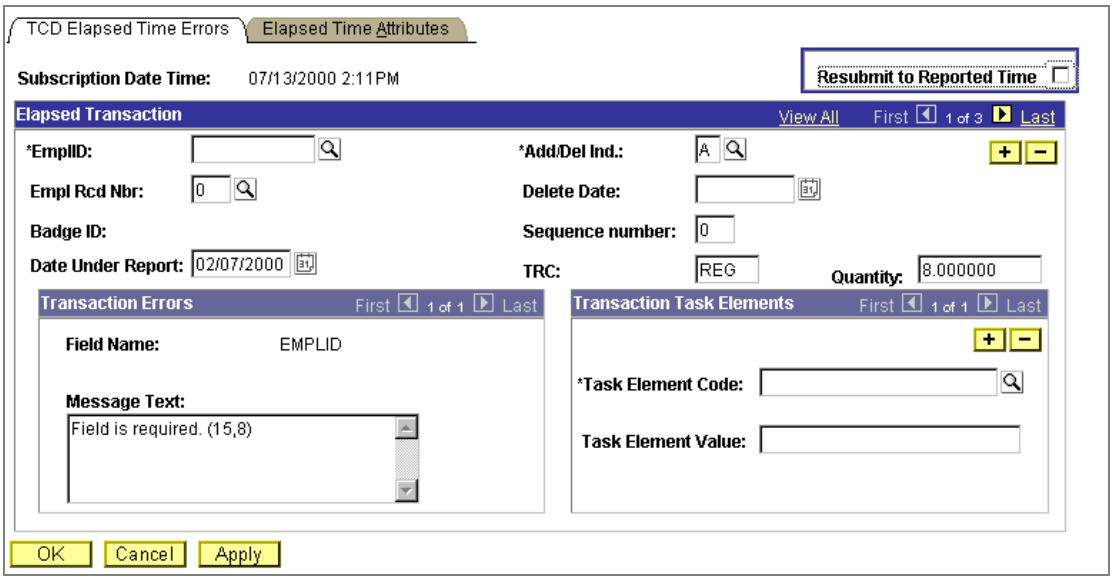
Publishing Node Displays the message node/comm serv (TCD) that the information was sent from.

This is either the node you established during TCD setup or the system node used with PeopleSoft Mobile Time and Expense.

Publication ID Displays a unique ID for the error message. A message may contain more than one punch or time entry.

Viewing and Fixing Elapsed Time Errors

Access the TCD Elapsed Time Errors page.



TCD Elapsed Time Errors page

Subscription Date Time Displays when the message was received by PeopleSoft Time and Labor.

Resubmit to Reported Time Select to submit the corrected time to PeopleSoft Time and Labor. When you click **OK** or **Apply**, the system submits all resolved transactions within the message to the Reported Time tables.

Elapsed Transaction

EmplID (employee ID), **Empl Rcd Nbr** (employee record number), and **Badge ID** Displays the time reporter's ID. You can change this value if this is the field in error for the reported time. Your TCD must send either an employee ID, badge ID, or employee record number

Add/Delete Indicator Indicates if the system should add or delete the 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 Displays the delete date for this message. 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 Displays a unique identifier for the time being reported.

Date Under Report This element is always required.

TRC — You may need to convert numeric code to character code depending on your TCD requirements.

Quantity — Displays the quantity for the TRC for the time being reported. This field can represent hours, amount, or units.

Transaction Errors

Field Name — Displays the name of the field causing the error.

Task Element Code — Displayed for informational purposes in case the task element code is causing the error.

Transaction Task Elements

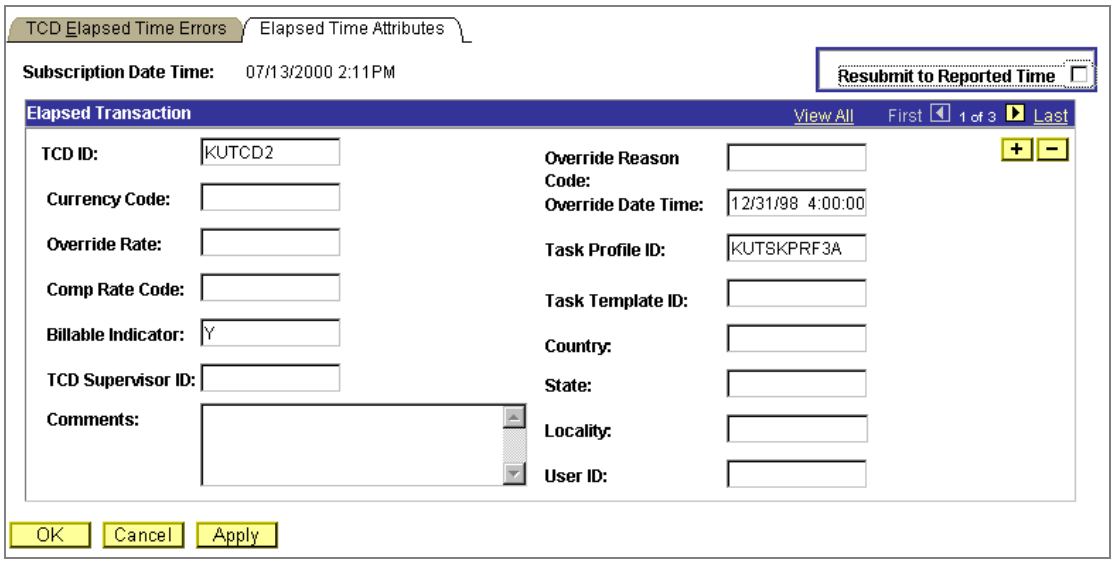
Task Element Code and **Task Element Value** — Displays, or you can select or enter, the task element code and value to send to the Reported Time tables for the time being reported.

OK — Click to save your changes and return to the TCD Error Queue page. If **Resubmit to Reported Time** is selected, the system also submits the time to the Reported Time tables.

Apply — Click to save your changes and remain on the current page. If **Resubmit to Reported Time** is selected, the system also submits the time to the Reported Time tables.

Viewing or Amending Elapsed Time Attributes

Access the Elapsed Time Attributes page.



TCD Elapsed Time Attributes page

You can enter a new value for any field on this page except the **Override Date Time** field.

Currency Code — The system displays, or you can enter, the currency code when the quantity for the time equals money.

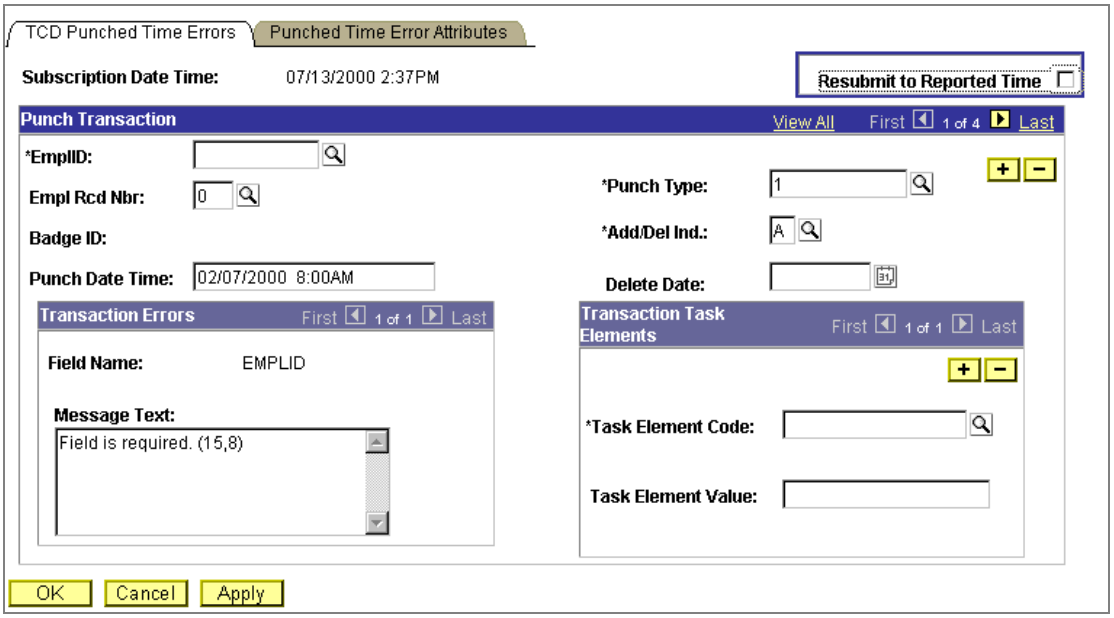
Comp Rate Code — The system displays, or you can enter, a comp rate code for the time being reported. The code is used to calculate the time reporter's pay.

Billable Indicator — If populated, the system uses the **Billable Indicator** field in conjunction with costs that it sends to PeopleSoft Projects.

Comments — The system displays, or you can enter, a comment for this punch. The comment will appear on the Weekly or Punch Time Entry pages if this field is selected on the associated Time Reporting Template for the time reporter.

Viewing and Fixing Punched Time Errors

Access the TCD Punched Time Errors page.



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 to submit the corrected time to PeopleSoft Time and Labor. When you click **OK** or **Apply**, the system submits all resolved transactions within the message to the Reported Time tables.

Empl ID (employee ID), **Empl Rcd Nbr** (employee record number), and **Badge ID**	Displays the time reporter ID for this punch. You can change these values if this is the field in error for the punch. Your TCD must send either an employee ID, employee record number, or badge ID.
Punch Type	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.
Add/Delete Indicator	Indicates if the recorded time should be added or deleted. 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	This field is always required.
Delete Date	Displays the delete date for this message. 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

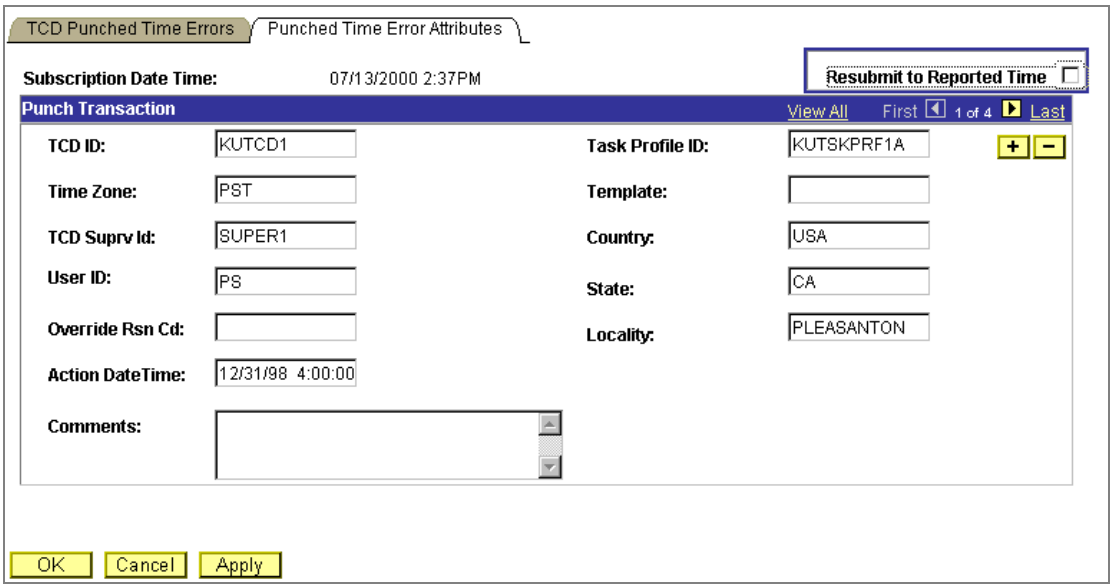
Field Name	Displays the name of the field causing the error for the time.

Transaction Task Elements

Task Element Code and **Task Element Value**	Displays, or you can select or enter, the task element code and value to send to the Reported Time tables for the time being reported.
OK	Click to save your changes and return to the TCD Error Queue page. If **Resubmit to Reported Time** is selected, the system also submits the time to the Reported Time tables.
Apply	Click to save your changes and remain on the current page. If **Resubmit to Reported Time** is selected, the system also submits the time to the Reported Time tables.

Viewing and Amending Punched Time Attributes

Access the Punched Time Error Attributes page.



Punched Time Errors Attributes page

You can enter a new value for any field on this page except the **Action Date Time** field.

Comments The system displays, or you can enter, a comment for this punch. The comment appears on the Weekly or Punch Time Entry pages if this field is selected on the associated Time Reporting template for the time reporter.

CHAPTER 16

Managing Time

This chapter provides an overview of managing time reporting and discusses how to:

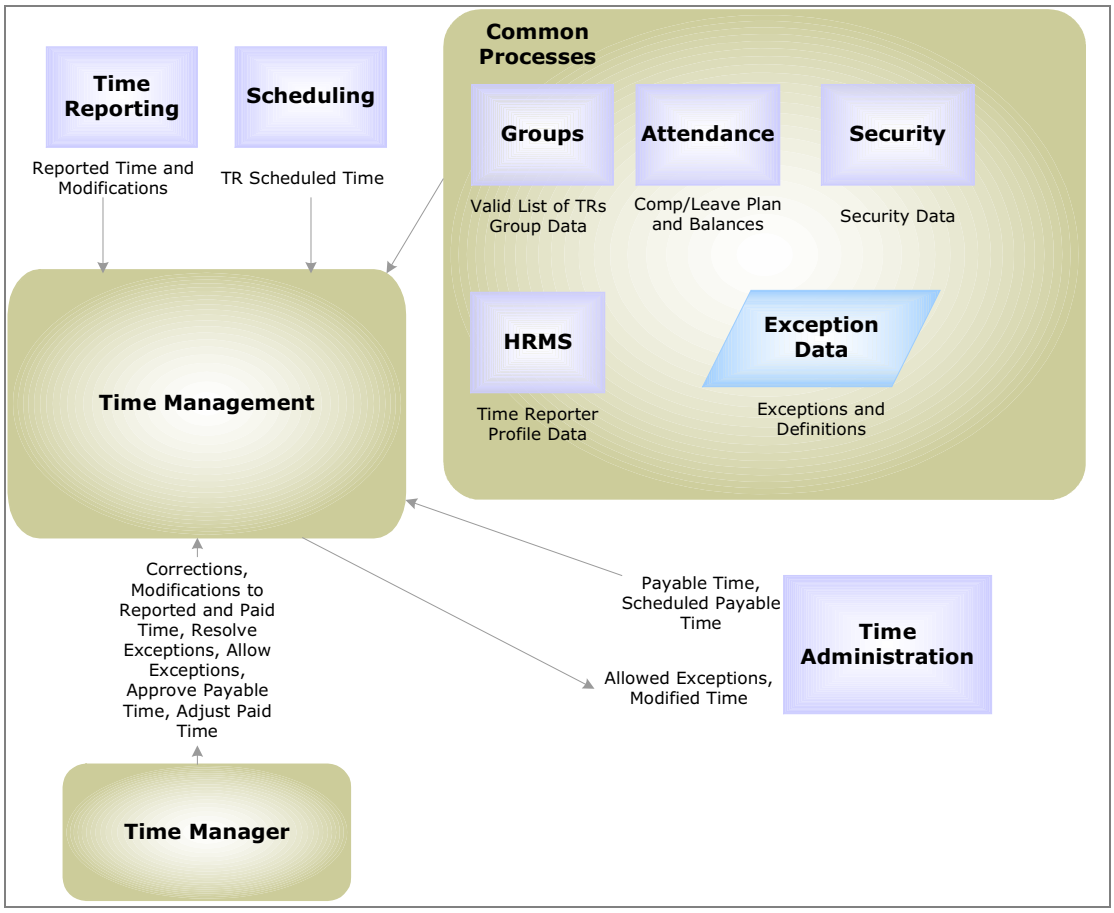
- Approve time.
- Manage exceptions.
- Adjust time.
- Audit time.
- Override rules for a day.

Understanding the Time Reporting Process

After time has been reported, you manage time by approving the time, resolving exceptions, modifying the time, or adjusting time after it has already been paid.

Use system security to determine which pages display for what type of user. For example, you may want a data entry clerk to only view reported or payable time. The Operator ID for the data entry clerk determines which page appears. In this case, the user can only view the time without making changes. Or, 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 determines which page appears; in this case, the Adjust page is accessible.

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:



Manage Time process flow

Common Elements Used in this Chapter

Job Title Displays the Job Title of the time reporter for which the time was reported.

ID Displays the time reporter EmplID for the reported time.

See Also

"Establishing Static and Dynamic Groups"

"Establishing Time and Labor Security"

Approving Time

This section provides an overview of approving time and discusses how to:

- Approve either individual time incidences or all incidences within the date range specified.
- Approve the payable time for all the employees in a time reporting group.
- View and approve reported time.
- Approve time for a group of employees during a batch process.

Understanding Approval of Payable Time

The requirement to approve payable time is controlled by users; there is no formal automatic approval process. Approval of payable time is required only 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 as time that must be approved.

You can view and approve payable time on either the single employee Approve Payable Time 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

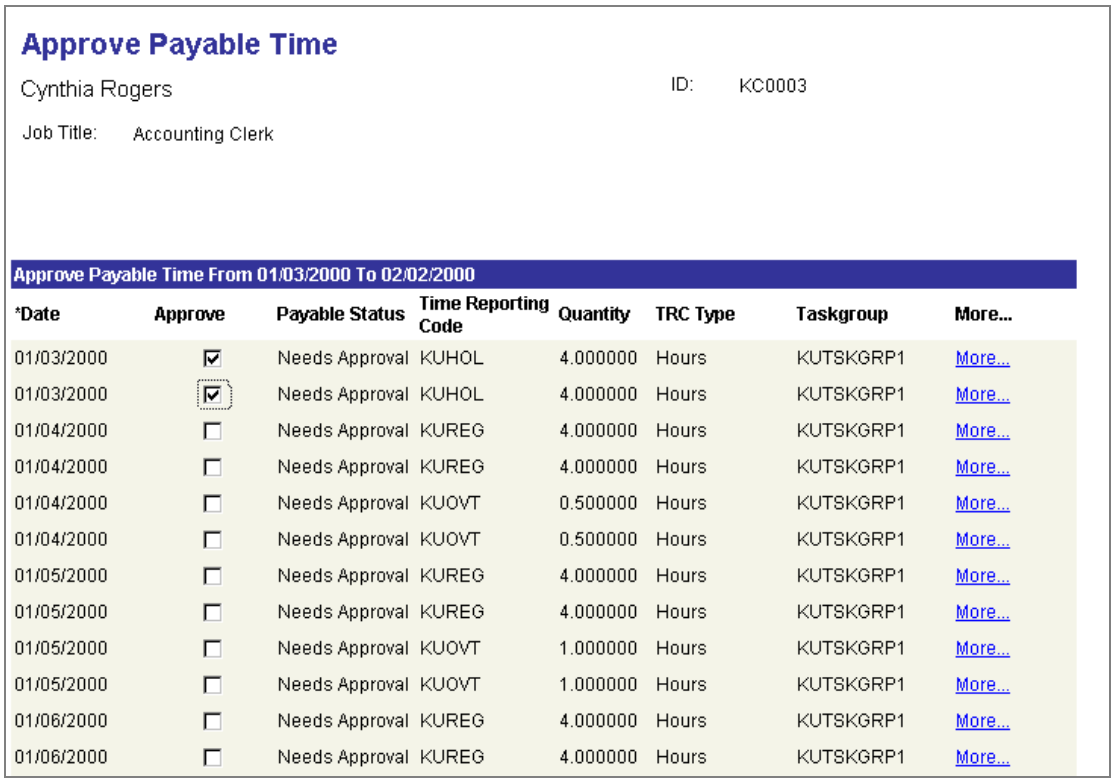
PeopleSoft Time and Labor normally finalizes time when it is sent to payroll. However, if time is not being sent to payroll for processing, such as in the case of non-employees, PeopleSoft Time and Labor must finalize the time by approving it. This is important when sending costs to PeopleSoft Projects. 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. When time is approved either online or during batch processing, the system closes the time and it can be sent to Projects.

Pages Used to Approve Time

Page Name	*Object Name*	*Navigation*	*Usage*
Approve Payable Time	TL_MNG_PAY_DET_PNL	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time	Approve either individual time incidences or all incidences within the date range specified.
Approve Payable Time (Group)	TL_MNG_GRP_APPROVE	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time (Group)	Approve the payable time for all the employees in a time reporting group.
Approval Details	TL_MNG_PAY_GRP_DET	Administer Workforce, Capture Time and Labor, Manage, Approve Payable Time (Group), Approval Details	View and approve reported time.
Batch Approval	TL_APPRV_RUNCTL	Administer Workforce, Capture Time and Labor, Process, Batch Approval	Approve time for a group of employees during a batch process.

Approving Payable Time

Access the Approve Payable Time page.



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

Time must be processed through Time Administration and have a payable status of Needs Approval.

Approve — Select to approve a single instance of reported time for this time reporter.

Date — The date of the day the time was reported for the payable time to be approved.

Payable Status — The status of the payable time.

Time Reporting Code
Quantity
TRC Type
Taskgroup — The time reporting code, quantity, TRC type, and taskgroup for the payable time to be approved.

More — Click to open the More Payable Time Information page, where you can view additional fields for the time.

Select All — Click to approve all the payable time records displayed on the page for this time reporter.

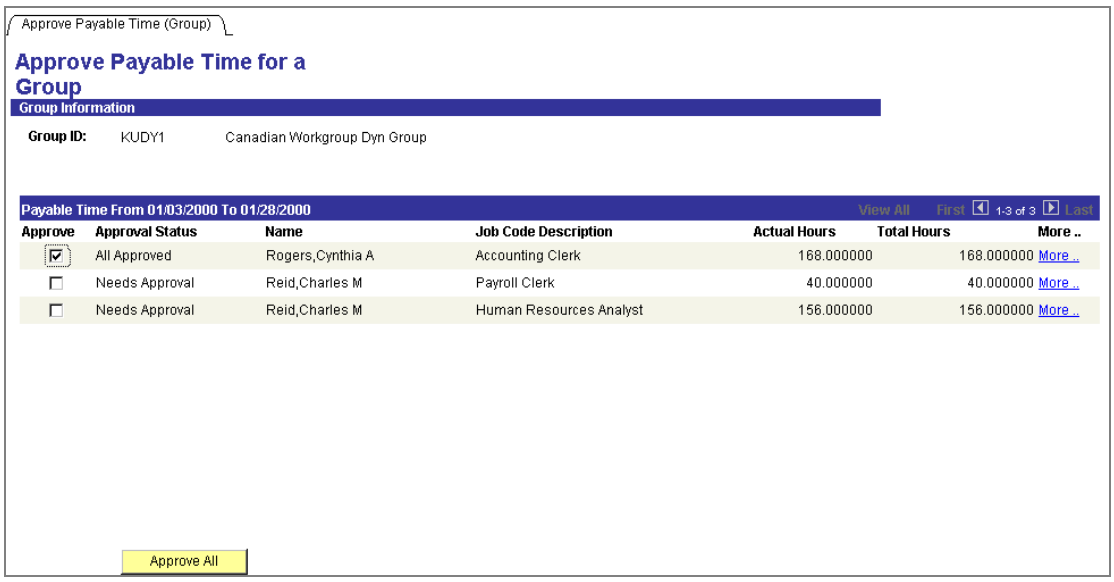
The More Payable Time Information page is accessible from the Adjust Paid Time, Approve Payable Time, and View Payable Time pages. For a description of the elements on the More Payable Time Information page, see Adjusting Time, More Payable Time Information in this section.

See Also

"Understanding Payable Time"

Approving Payable Time for a Group

Access the Approve Payable Time (Group) page.



Approve Payable Time (Group) page

Approve Select 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 Displays the approval status of the payable time that was either approved or needs approval.

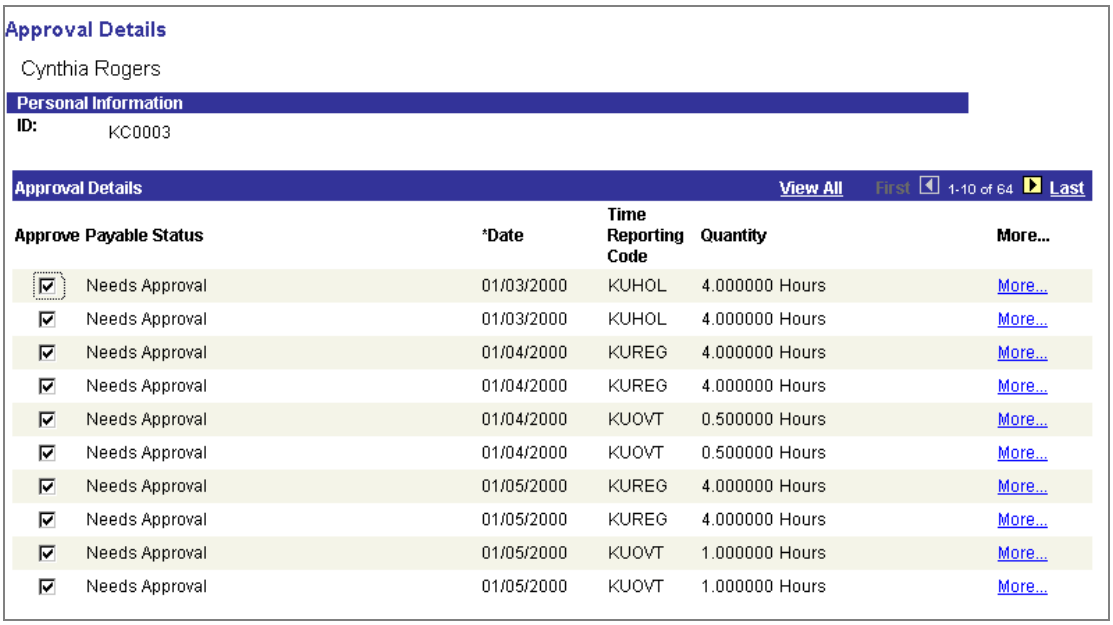
Actual Hours/Total Hours Each row of the grid displays the **Actual Hours** and **Total Hours** for a time reporter in the group. In PeopleSoft Time and Labor, you keep such things as shift differentials and shift bonuses (compensation only hours) separate from the actual hours of effort reported. The 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 reflect all the payable time that exists for the time reporter for the dates displayed.

More	Click to view the details of the time. A page appears that you can also use to approve reported time.
Approve All	Click to approve all the payable time records for this group for this date range.

Approving Reported Time Details

Access the Approval Details page.



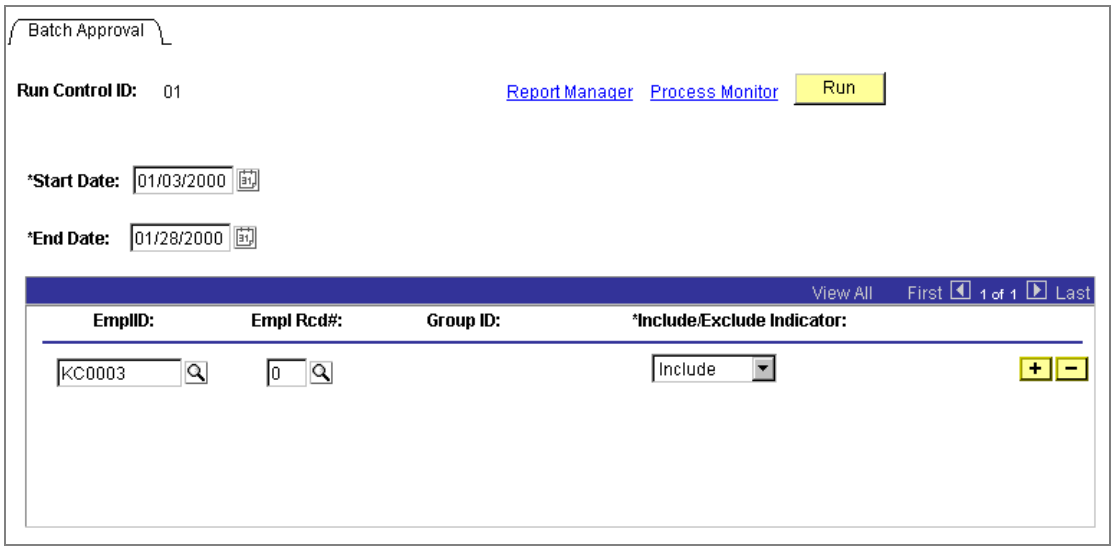
Approval Details page

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 blank.

Click the **More** link 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.

Approving Time for a Group of Employees

Access the Batch Approval page.



Batch Approval page

Start Date
End Date

Enter the start and 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 select EmplID, **Group ID** is unavailable for entry for that row.

Empl Rcd #

Displays the employee record number for the EmplID. If **EmplID** is blank, this field is 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, select ***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

This section presents an overview of managing exceptions and discusses how to:

- Manage exceptions by group.
- Sort the exceptions that display on the Manage Exceptions page.

- View exception information details.
- Manage exceptions for a specific employee.
- Filter exceptions that you do not want to view on the Manage Exceptions page.
- View exceptions that have been resolved or allowed.

Understanding Exceptions

Time Managers must resolve or allow exceptions 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 must be reviewed and the exception resolved or allowed for the system to process and generate payable time. The Time Manager's role starts when something appears incorrect with a time reporter's time. An *exception* is a condition that exists regarding reported time that requires review or attention. 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 enables you to define your own exception criteria.

Exceptions are generated when time is reported and either an aspect of the time is incorrect, or the time does not comply with a user-defined rule. Exceptions may be system-generated through validation processes or generated as a result of Time Administration rules. Each exception has an associated severity level. 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. Use the Manage Exception component to specify which exceptions to allow for a specific time reporter, or a group of time reporters.

To resolve an exception, determine if an error exists with reported time or if there is an invalid value in a setup table. If the error is due to reported time (non-setup exception), 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 must 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 does not become payable time. Exceptions with a severity level of *low* become payable time, and also remain in the Exceptions Table until the exception is resolved or allowed.

The Allow Exceptions functionality enables you to allow an exception to be processed and generate payable time without having to resolve it. This is useful 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 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.

PeopleSoft also provides a status indicator for the exception. This Exception Status can help you work with the exceptions. Possible 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, then Time Reporting modifies the status to *Changed.* When Time Validation and Time Administration run again, if the exception condition no longer exists, then the status changes to *Resolved.*

A *Changed* status may indicate that you should examine the time to validate that the exception should still be allowed. You may want to be notified that an exception you previously allowed has been changed that may affect that time. If you want to ignore that modification you can leave the exception and the selected allowed indicator remains. Or, you may want to review the time more closely.

View Exception History Information by using the Exception History page. The following conditions determine if the exception information appears on this page:

- If you set up an Exception ID with the Archive check box cleared, (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, (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, (Archive), the exception appears when you either *Resolve* or *Allow* the exception.

Note. 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) for the system to create payable time for the time reporter in these instances.

See Also

"Setting Up Basic Tables," Exceptions

Viewing Exceptions History

Defining Exception Conditions

You can define all the conditions that should 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. You focus only on the elements of reported time that are important to your organization.

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 initiates 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 should be adjusted or if a setup table value must 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.

After 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 changes 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*. After the nonsetup-related exception has been resolved and the Clean Up Exceptions button clicked, 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 click 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 must 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 initiates 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.

Note. 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.

Pages Used to Manage Exceptions

Page Name	*Object Name*	*Navigation*	*Usage*
Manage Group Exceptions	TL_MNG_EXCEPT_PNL1	Administer Workforce, Capture Time and Labor, Manage, Manage Group Exceptions	Manage exceptions by Group. Up to 100 exceptions display per page.
Filter Exceptions	TL_MNG_SORT_FILTER	Click the Filter Options link on the Manage Group Exceptions page.	Sort the exceptions that display on the Manage Exceptions page.
Exception Information	TL_MNG_EXC_SEC_PNL	Click the Exception ID link on the Manage Group Exceptions page.	View exception information details.
Manage Time Exceptions	TL_MNG_EXCEPT_PNL3	Administer Workforce, Capture Time and Labor, Manage, Manage Exceptions	Manage exceptions for a specific employee. Up to 50 exceptions display per page.
Filter Exceptions	TL_MNG_EX_FILTER	Click the Filter Options link on the Manage Time Exceptions page.	Filter exceptions that you do not want to view on the Manage Exceptions page.
Exceptions History	TL_AUD_EXCEPT_PNL	Administer Workforce, Capture Time and Labor, Inquire, View Exceptions History	View exceptions that have been resolved or allowed.
Filter Exceptions	TL_AUD_EXCEP_FLTR	Click the Filter Options link on the Exceptions History page.	Filter the exceptions you want to view.

See Also

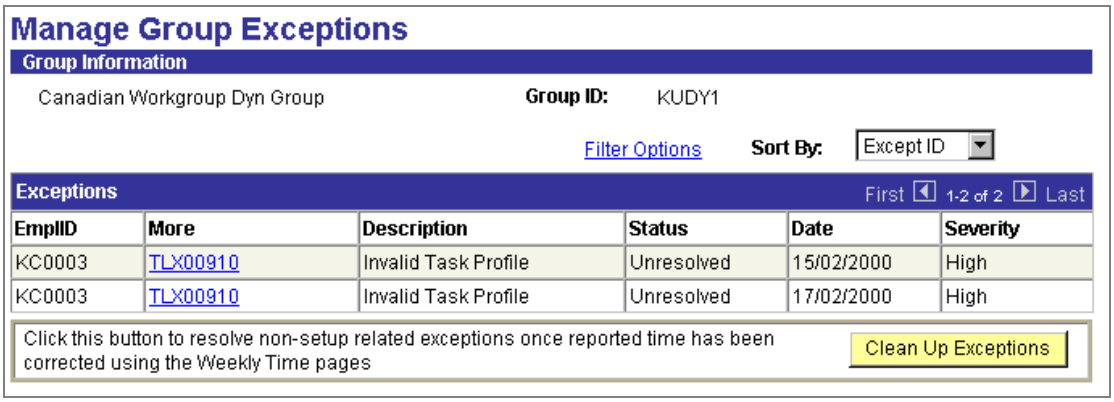
"Setting Up Basic Tables," Exceptions

Appendix B: Exceptions and Validations

"Introduction to PeopleSoft Time and Labor," Understanding Validating Time

Managing Group Exceptions

Access the Manage Group Exceptions page.



Manage Group Exceptions 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 to control which exceptions the system displays to approve or resolve. The system displays 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: ***Date*** (reported date), ***Except ID*** (exception ID), ***EmplID*** (employee ID), ***Severity,*** and ***Status.***

Allow — Select 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 are hidden.

More — Displays the Exception ID code that was delivered with the system or that you defined using the Define Exceptions page. Click the **Exception ID** link to view the Exception Information details of the exception.

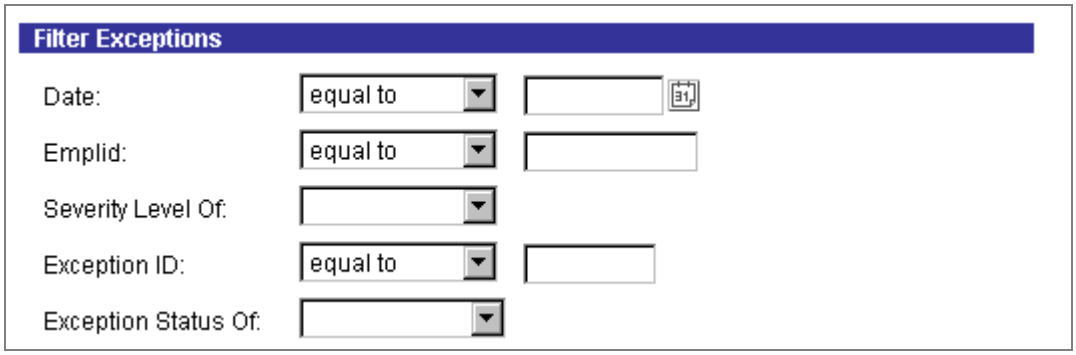
Status — Displays the status of the exception: ***Changed*** or ***Unresolved.***

Date — Displays the date of the reported time that caused the exception.

Severity	Displays the severity of the exception: ***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 to allow all the exceptions for the group. This selects the **Allow** check boxes. The exceptions can now be processed through Time Administration to create payable time. If you click this 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 are hidden.
Clean Up Exceptions	Click to resolve all exceptions created by time reporting validations (not setup-related exceptions).

Sorting the Exceptions

Access the Filter Exceptions page.

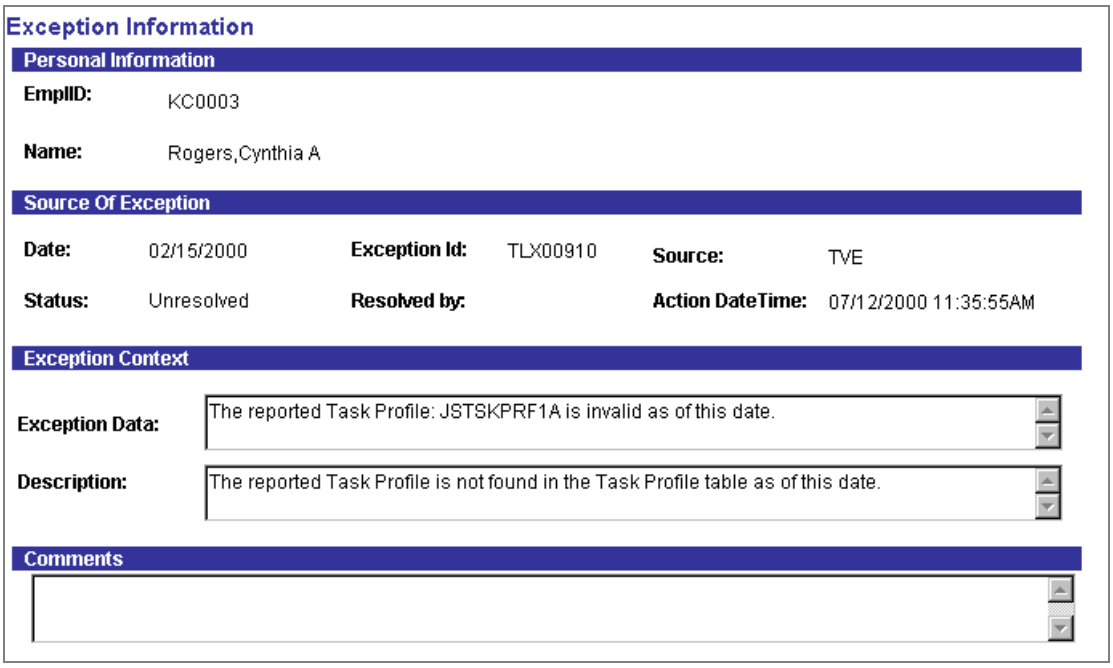


Filter Exceptions page

Date	Select a date filter for this exception: ***between, equal to, greater than,*** or ***less than.***
EmpliD	Select an EmplID filter for this exception: ***equal to, greater than, less than,*** or ***like.***
Severity Level Of	Select a severity level filter for this exception: ***High, Low,*** or ***Medium.***
Exception ID	Select an exception ID filter for this exception: ***equal to, like, not equal to, not like.***
Exception Status of	Select an exception status filter for this exception: ***Changed*** or ***Unresolved.***

Viewing Exception Information Details

Access the Exception Information page.



Exception Information page

Source of Exception

Date The date the exception was generated by the system.

Exception Id This exception could either be a system-delivered exception or one that you defined using the Define Exceptions pages.

Source The source of the process that created the exception, such as Time Administration or Time Validation.

Status Displays the current status of the exception.

Resolved by Displays the Operator ID of the person who resolved or allowed the exception.

Action Date Time Displays the date and time the exception was resolved or allowed.

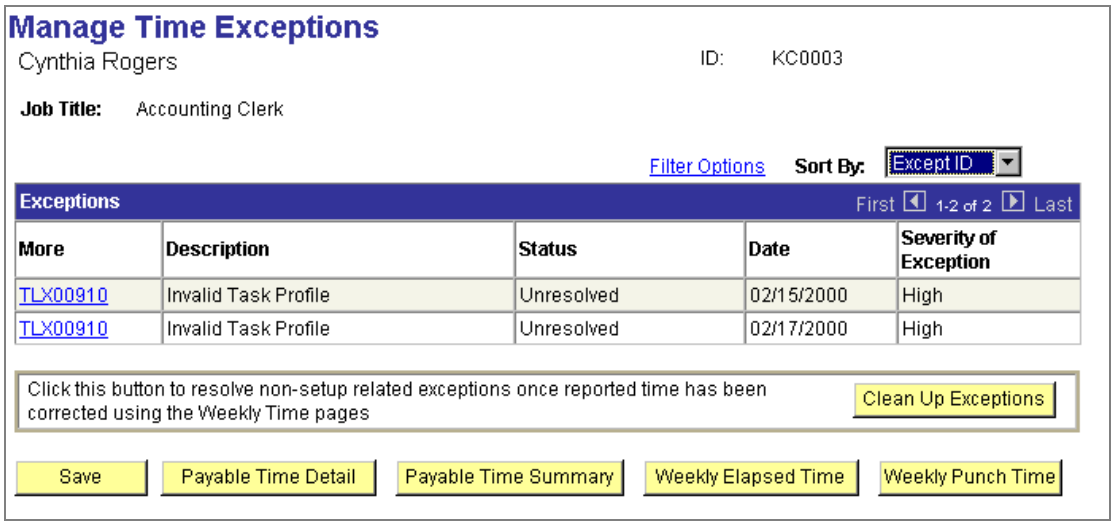
Exception Context

Exception Data Displays the message that contains the actual values that were entered that caused the exception such as “The reported TRC BNKR is invalid.”

Description	Displays more details about the exception to help you troubleshoot the problem.
Comments	Enter any comments about how or why the exception was allowed or resolved.

Managing Exceptions for an Employee

Access the Manage Time Exceptions page.



Manage Time Exceptions page

This page is similar to the Manage Group Exceptions page. You filter exceptions using the Filter Options link, and view additional information about the exception using the Exception ID link. The differences between Manage Exceptions by Group and Manage Exceptions by Employee are:

- You can view exceptions for one employee at a time.
- Manage Time Exceptions includes links to the Payable Time Detail, Payable Time Summary, Weekly Elapsed Time, and Weekly Punch Time pages.

See Also

"Using Self Service Components," Viewing Details of Payable Time

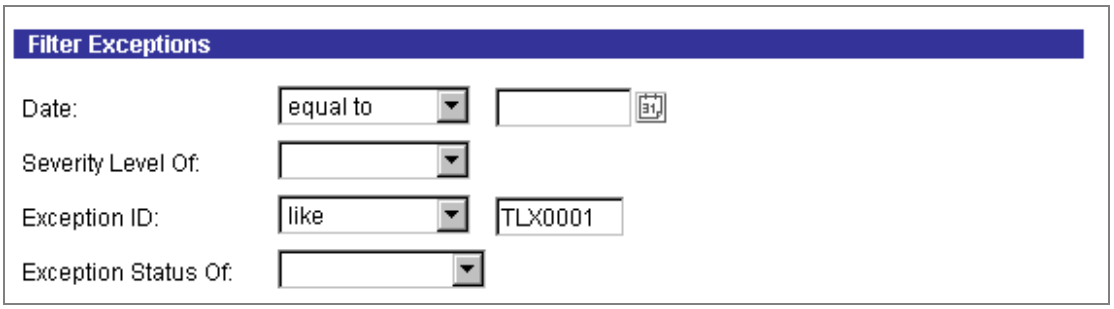
"Using Self Service Components," Viewing Forecasted Payable Time

"Using Self Service Components, " Entering, Viewing, and Changing Elapsed Time

"Using Self Service Components, " Entering, Viewing, or Changing Employees' Weekly Punch Time

Filtering Exceptions

Access the Filter Exceptions page.

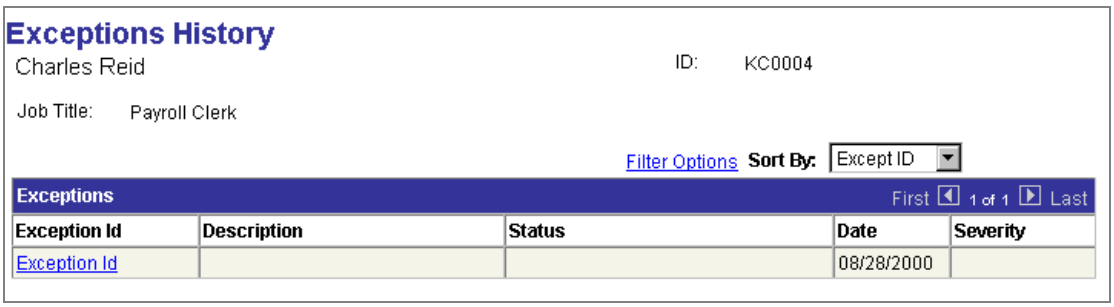


Filter Exceptions page

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 link.

Viewing Exceptions History

Access the Exceptions History page.



Exceptions History page

Exception Id Click 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 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.

Status Displays whether the exception was ***Resolved*** or ***Allowed.*** To view and allow ***Unresolved*** or ***Changed*** exceptions, see the Manage Exceptions page.

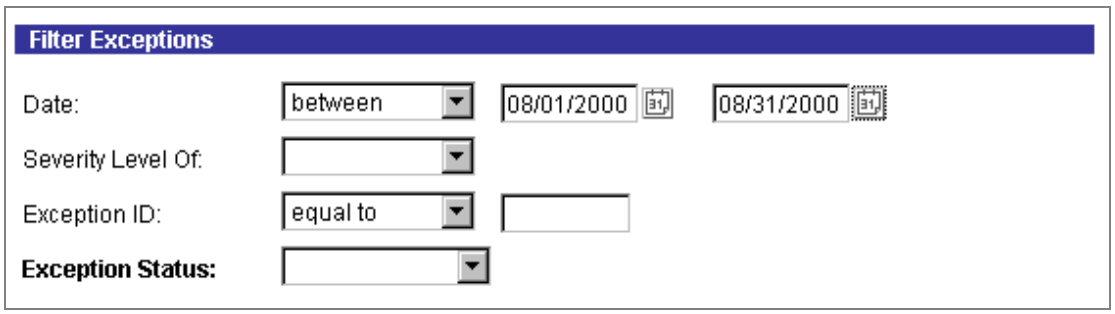
Date Displays the date for the time being reported.

Severity Displays the severity of the exception: ***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 link is the same one used to manage exceptions. See Manage Exceptions by Group, Exception Information Details for an explanation of those fields.

Important! To view a particular exception on the Exceptions History page, you must first specify that you want the exception to be archived during exception setup. To do this, go to the Define Exception page, display the specific exception of interest, and select the Archive Exception check box. When the exception is generated and is subsequently resolved or allowed, it appears on the Exceptions History page.

Filter Exceptions Page 3



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.

See Also

"Appendix B: Exceptions and Validations"

"Understanding Batch Processing in Time Administration," Step 12 - Processing Exceptions

Adjusting Time

This section provides an overview of adjusting time and discusses how to make *Record Only* adjustments for individual employees or for non-employees.

Understanding Adjustments to Payable 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 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. To keep your payroll and PeopleSoft Time and Labor systems in sync, you use PeopleSoft Time and Labor to 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 enables you to keep PeopleSoft 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 change existing payable time that has already been processed by PeopleSoft Payroll for North America 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 Adjust Paid Time page for editing. You can change any field except the Date, Payable Status, and Type fields. After you make adjustments using this page, the system does not process the time further. It does not run it through Time Administration or pass the time to Payroll. PeopleSoft Time and Labor does publish the payable time 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 payable time, the system creates Offsets because all payable time rows viewable in Adjust Paid Time are in a frozen state. The system creates 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 as in the following table:

Date	***Quantity***	***TRC***
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 you are reporting. The offsets do not display on the Adjust Paid Time page, but you can view them on the View Payable Time page.

See Also

"Integrating with PeopleSoft Financials," PeopleSoft Projects Integration

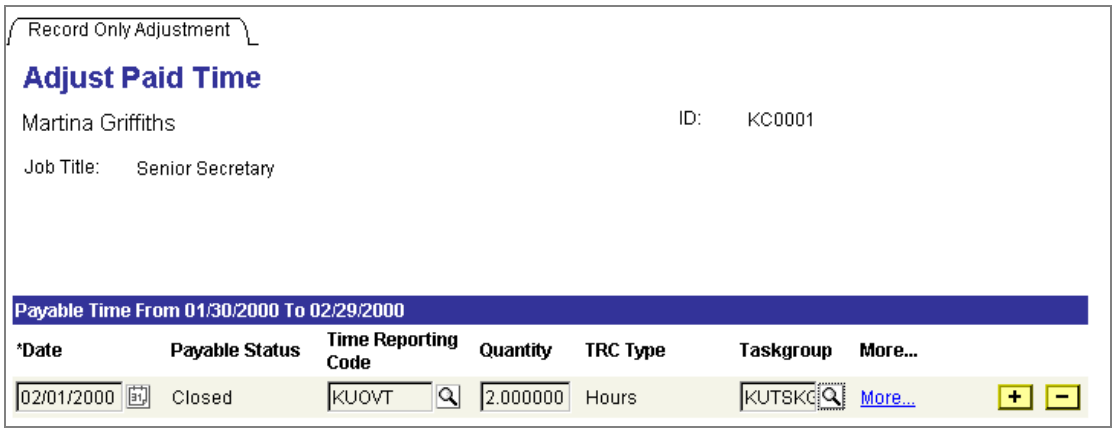
"Using Self Service Components," Reporting Time

Page Used to Adjust Time

Page Name	Object Name	Navigation	Usage
Record Only Adjustment	TL_MNG_PAT_DET_PNL	Administer Workforce, Capture Time and Labor, Manage, Adjust Paid Time	Make *Record Only* adjustments for individual employees or for non-employees.

Making Record Only Adjustments

Access the Record Only Adjustment page.



Record Only Adjustment page

Note. If you change or add Leave Time Taken, you must 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.

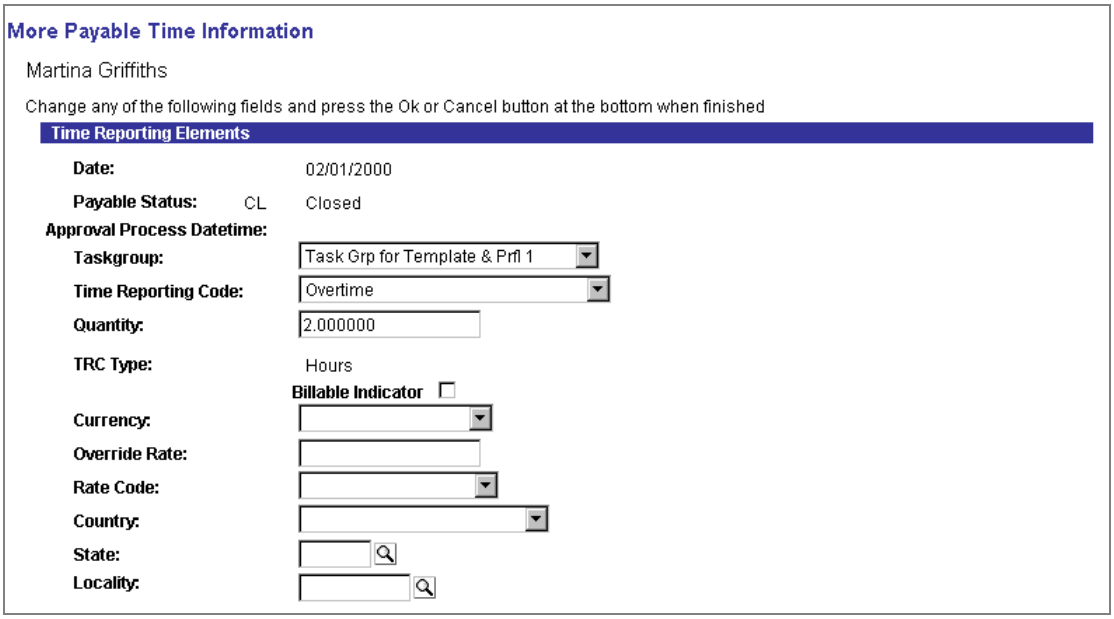
Payable Status Displays the payable status for the reported time: ***Closed, Paid-Labor Diluted,*** and ***Paid – Labor Distributed.***

Time Reporting Code Enter the Time Reporting Code (TRC) to use to adjust the time, or leave the field blank. The system uses TRCs to track time reporter's time to support all of your administrative and compensation needs, such as payroll processing, or to collect Labor Distribution information.

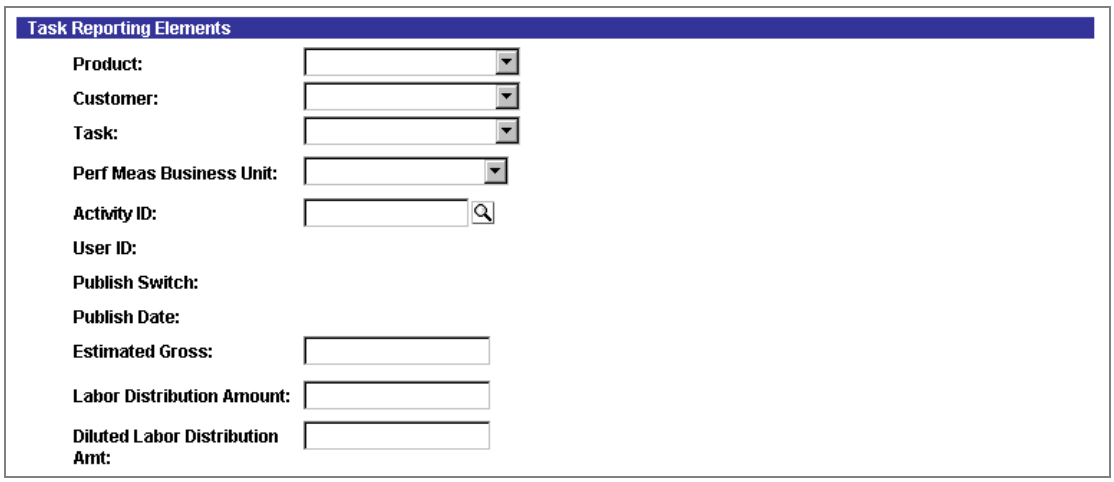
Quantity	Enter the quantity to use for the Time Reporting Code for the reported time: ***Amounts, Units,*** or ***Hours*** depending on the Time Reporting Code entered.
TRC Type	Displays the TRC Type (Amounts, Units, or Hours) based on the Time Reporting Code that you entered to adjust the time. This is a display-only element.
Taskgroup	Select the taskgroup for the time you want to adjust. The system displays the appropriate task elements on the More Payable Time Information page depending on your selection.
More	Click for details for the time you want to adjust. A page appears that you can use to adjust additional fields for the time.

More Payable Time Information

Access the More Payable Time Information page.



More Payable Time Information page (1 of 2)



More Payable Time Information page (2 of 2)

Time Reporting Elements

Date — Displays the date you entered on the Adjust Paid Time page.

Payable Status — 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 ***Closed, Paid-Labor Diluted,*** and ***Paid – Labor Distributed.***.

Approval Process Datetime — Displays the date and time this reported time was approved. This is a display-only element.

Taskgroup — Displays the taskgroup name for the taskgroup you entered on the Adjust Paid Time page, or you can select the taskgroup to use for the adjusted time here. The Task Reporting Elements defined for the taskgroup appear at the bottom of the page under Task Reporting Elements.

Time Reporting Code — 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 to adjust.

Quantity — 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 to adjust.

TRC Type — Displays the TRC Type for the TRC of the payable time to adjust.

Billable Indicator — Select to make the time 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 reporters to report a currency type code for the time being reported and if the TRC Type for the time is an ***Amount.***

Override Rate Select an override rate for the time to adjust. The rate is passed to your payroll system to use in calculating pay. Otherwise, the rate is set by default 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 uses the default for the time reporter.

State Select the state for the time being adjusted 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 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

These elements appear if the task element is defined on the taskgroup associated to the time reporter.

Company
Business Unit
Location
Department
Position
Product
Customer
Task
Project/Grant

Select an item for the time being adjusted for each applicable element.

PC Business Unit
Resource Type
Resource Category
Resource Sub Category
Perf Meas Business Unit
Activity ID
Account Code
User Field 1-5
Job Code

User ID Displays the User ID of the person who adjusted the time.

Publish Switch 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 *closed*. Time and Labor sets 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. PeopleSoft keeps the estimate as an historic record of what Time Administration calculated.
Labor Distribution Amount	Enter the adjusted labor distribution amount for the time being adjusted. You must manually determine the amount 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.

See Also

"Understanding Payable Time"

"Defining Task Reporting Requirements," Creating Task Templates

"Setting Up Basic Tables," Understanding Time and Labor Implementation

Auditing Time

This section provides an overview of auditing time and discusses how to:

- View current reported time.
- View changes made to the reported elapsed time selected.
- View details about the time reporting elements and task reporting elements reported for the time.
- View further history about the time that was originally reported then changed.

- View tracked changes that may have occurred to the originally reported time.
- View the details of the time for the date.
- View details about the reported punch time.
- View further history about the time that was originally reported then changed.

Understanding Auditing Time

PeopleSoft provides audit pages that you can use to view punch and elapsed time for history purposes. These pages enable 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 link 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 and any other changes that happened prior to the reported time that is considered current. The pages, both main and History also include a More link that you can use to view additional information about the reported time for the row. These pages eliminate the need 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.

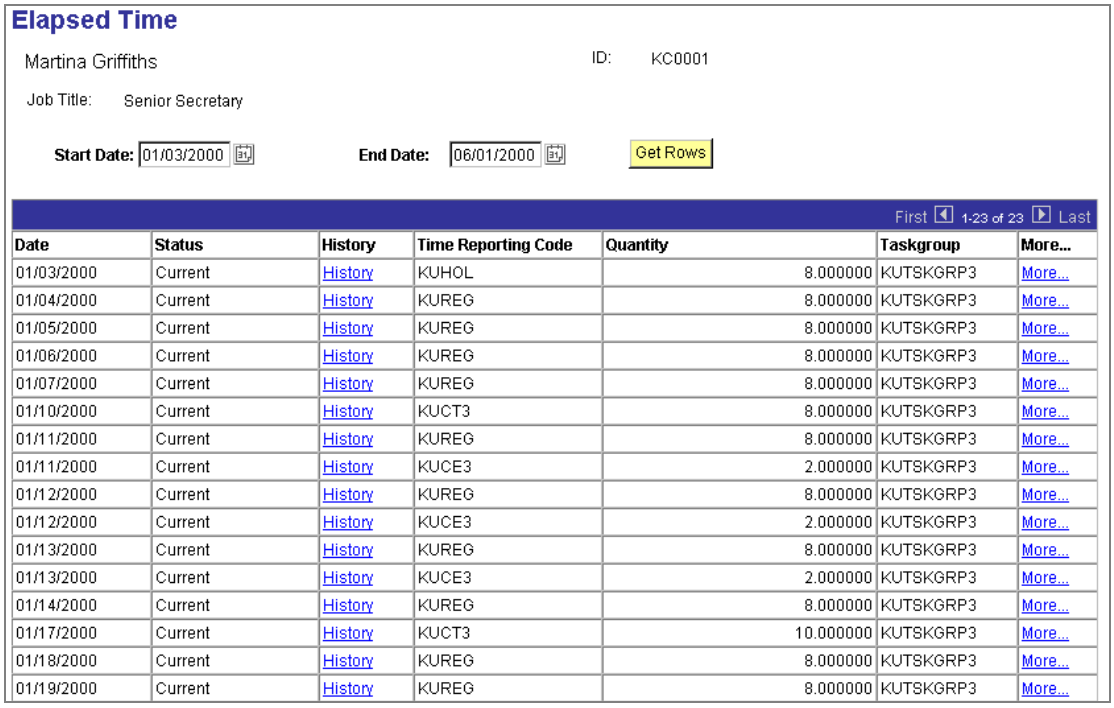
Pages Used to Audit Time

Page Name	*Object Name*	*Navigation*	*Usage*
Elapsed Time	TL_AUD_ELPTIME_PNL	Administer Workforce, Capture Time and Labor, Inquire, Elapsed Time Audit	View current reported time.
Elapsed Time Audit	TL_AUDIT_ELP_PNL	Click the History link on the Elapsed Time page.	View changes made to the reported elapsed time selected.
Elapsed Audit	TL_AUDIT_ELP_S1	Click the More link on the Elapsed Time page.	View details about the time reporting elements and task reporting elements reported for the time.
Elapsed Audit History	TL_AUDIT_ELPHIS_S1	Click the More link on the Elapsed Time Audit page.	View further history about the time that was originally reported then changed.

Page Name	*Object Name*	*Navigation*	*Usage*
Punch Time	TL_AUD_PUNTIME_PNL	Administer Workforce, Capture Time and Labor, Inquire, Punch Time Audit	View tracked changes that may have occurred to the originally reported time.
Punch Time Audit	TL_AUDIT_PCH_PNL	Click the History link on the Punch Time page.	View the details of the time for the date.
Punch Audit page	TL_AUDIT_PCH_S1	Click the More link on the Weekly Punch Time page.	View details about the reported punch time.
Punch Audit History	TL_AUDIT_PCHHIS_S1	Click the More link on the Punch Time Audit page.	View further history about the time that was originally reported then changed.

Viewing Elapsed Time

Access the Elapsed Time page.



Elapsed Time

Martina Griffiths ID: KC0001

Job Title: Senior Secretary

Start Date: 01/03/2000 End Date: 06/01/2000 Get Rows

First 1-23 of 23 Last

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

Start Date
End Date

Enter the start and end date for the time you want to view. The system populates the fields with the data for all time reported on and in-between the start and end dates.

Get Rows — Click after you enter the start and end dates. The system retrieves the data for all the current reported time, and all time that has been deleted that was reported on and between the start and end dates.

Status — Indicates whether the time is ***current*** or was ***deleted.*** If ***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 (through the Weekly Elapsed Time page).

History — Click 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; click the link to view them.

Time Reporting Code — Displays the Time Reporting Code for the reported time that has a status of either ***current*** or ***deleted.***

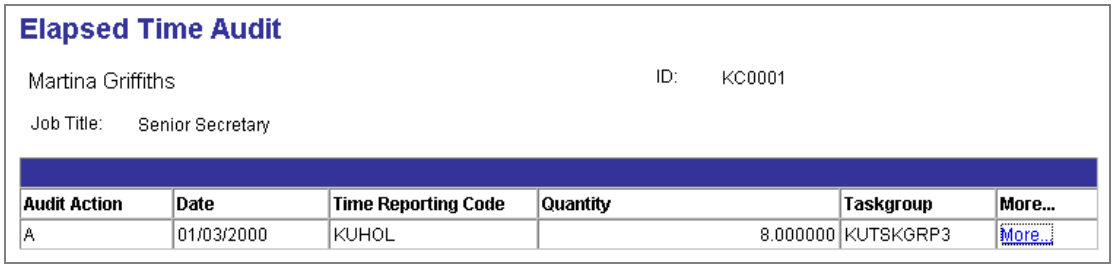
Quantity — Displays the quantity for the Time Reporting Code for the reported time that has a status of ***current*** or ***deleted***.

Taskgroup — Displays the taskgroup for the reported time that has a status of ***current*** or ***deleted***.

More — Click to see details about the ***current*** or ***deleted*** reported time.

Viewing Changes Made to Reported Elapsed Time

Access the Elapsed Time Audit page.



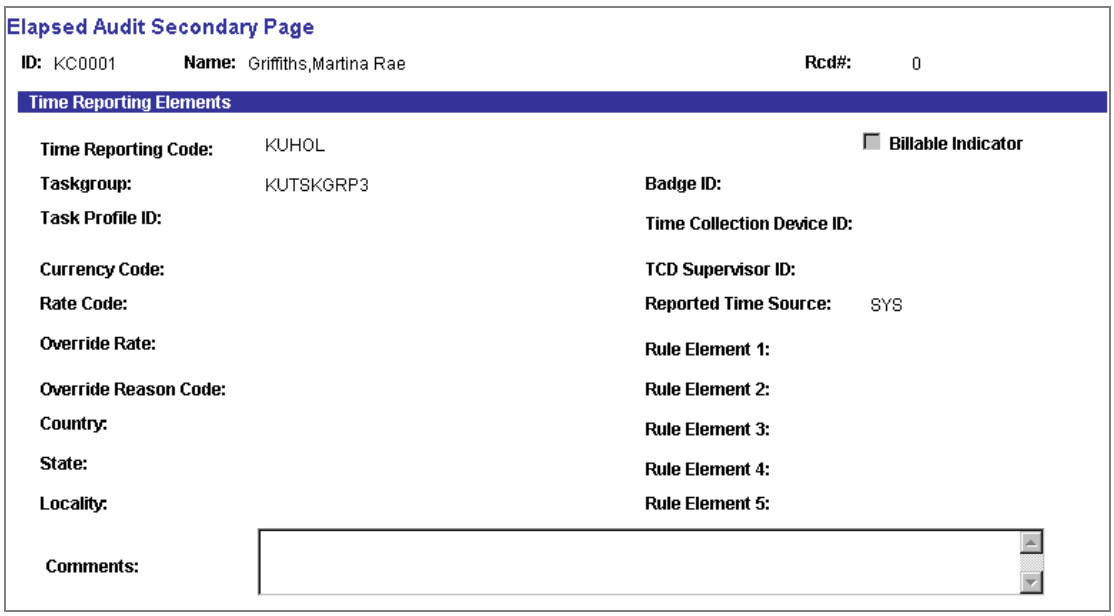
Elapsed Time Audit page

Audit Action — Displays the Audit Action for the reported time: ***A,*** (Add), ***C*** (Change), ***D*** (Delete), ***K*** (Key Change Old Key), and ***N*** (Key Change New Key).

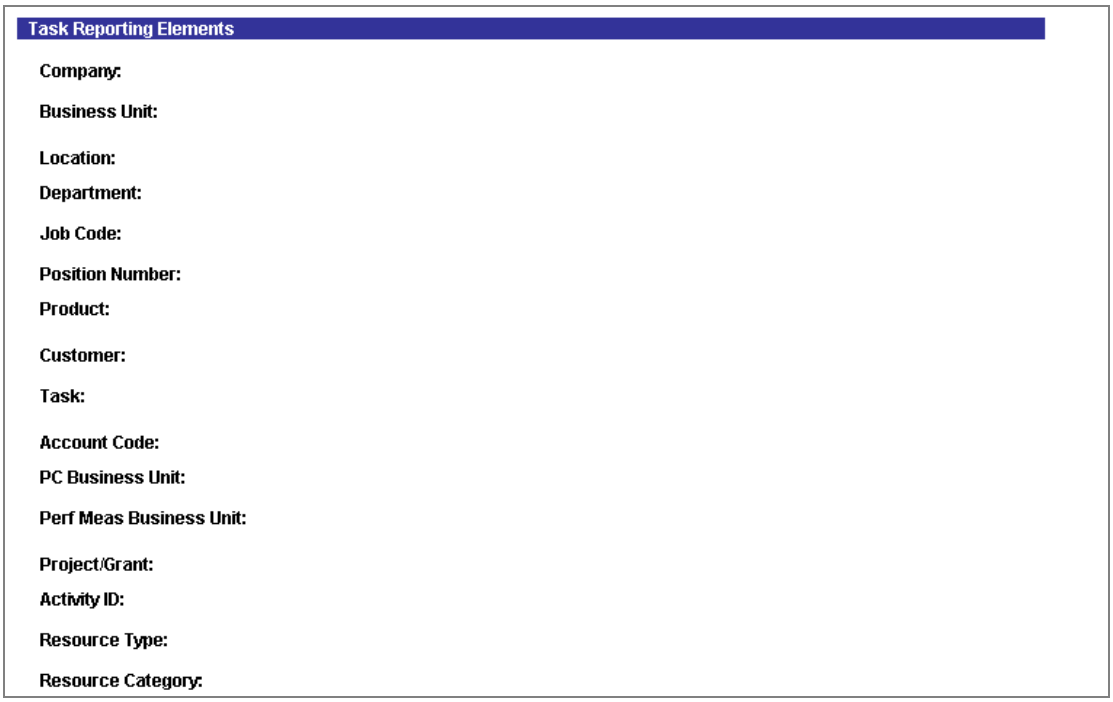
Date **Time Reporting Code** **Quantity** **Taskgroup**	Displays the date, time reporting code, quantity, and taskgroup for the reported time that was originally reported then changed.
More	Click to see details about the time that was originally reported then changed.

Viewing Elapsed Time Audit Details

Access the Elapsed Audit page.



Elapsed Audit page (1 of 3)



Elapsed Audit page (2 of 3)



Elapsed Audit page (3 of 3)

Time Reporting Elements

Badge ID Displays the Badge ID number for the reported time if you require a Badge number to be used when reporting time.

Task Profile ID	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	Displays the ID of the Supervisor assigned to the time reporter for the reported time.
Time Collection Device ID	Displays the ID of the Time Collection Device to which the time was reported.
Reported Time Source	Displays the source of where the reported time was generated, such as Time Administration or Time Validation.
Override Reason Code	Displays the code for the reason the reported time was overridden.
Rule Element 1-5	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

This section describes 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.

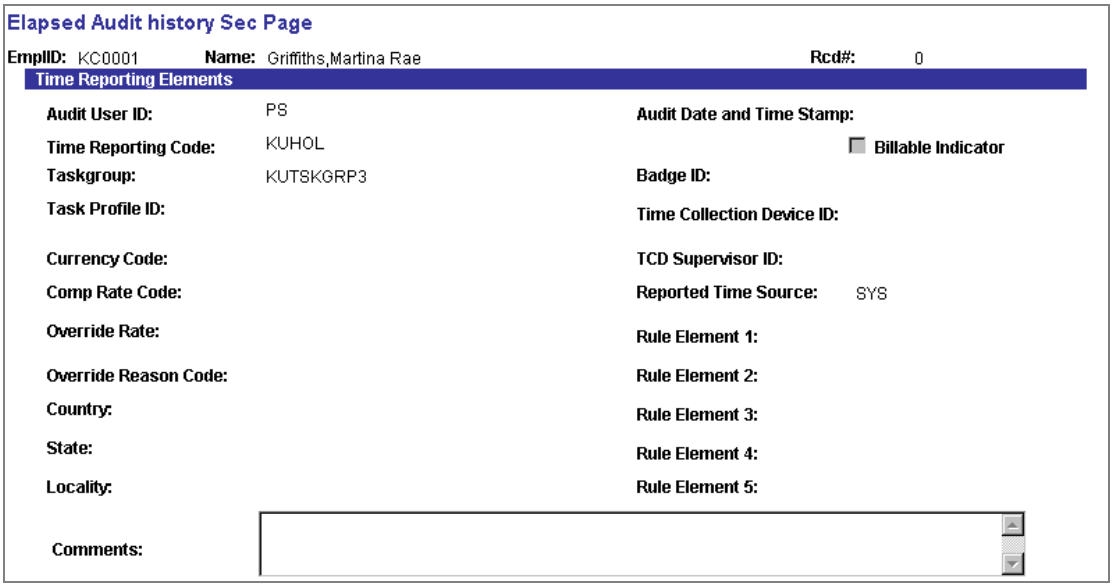
Department SetID	Displays the department setID for the reported time. The system resolves the HR Business Unit setID to enable you to enter values into your Job Code, Department, and Location fields.
Resource SetID	Displays the resource setID for the reported time. The system resolves the PC Business Unit setID to enable you to enter values into your Project Resource fields.
Activity SetID	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.
Position Number	Displays the position number for the time reporter.
Job Code Set ID	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 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.

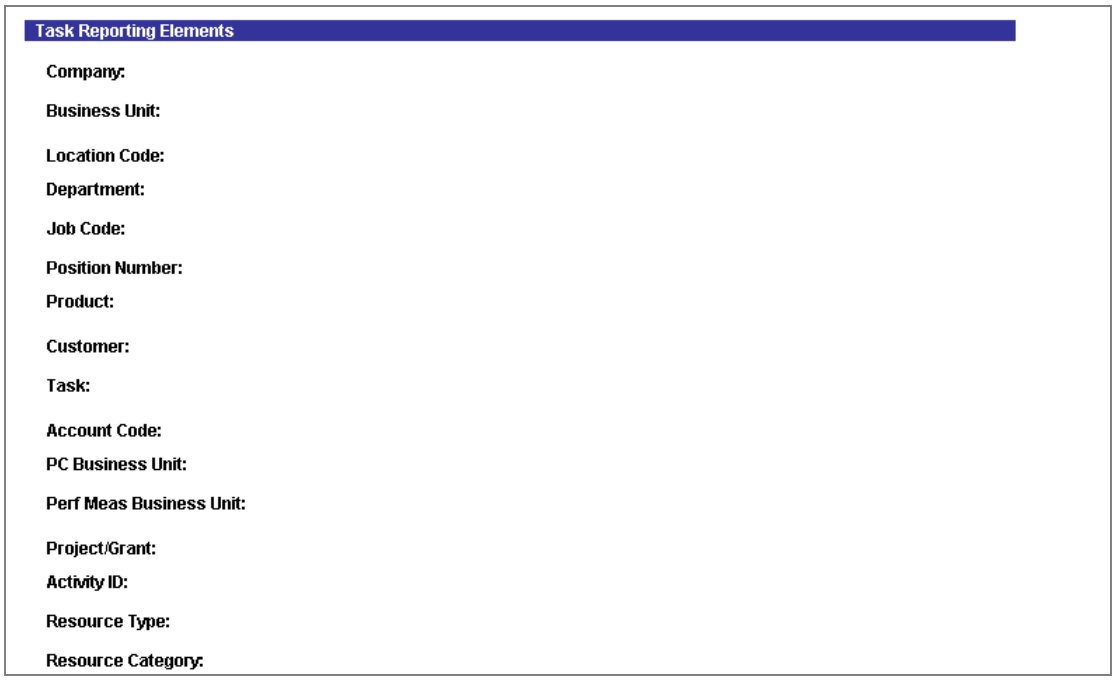
The rest of the elements displayed on the page are documented under Adjusting Time, More Payable Time Information.

Viewing Further Elapsed Audit History

Access the Elapsed Audit History page.



Elapsed Audit History Sec page (1 of 3)



Elapsed Audit History Sec page (2 of 3)



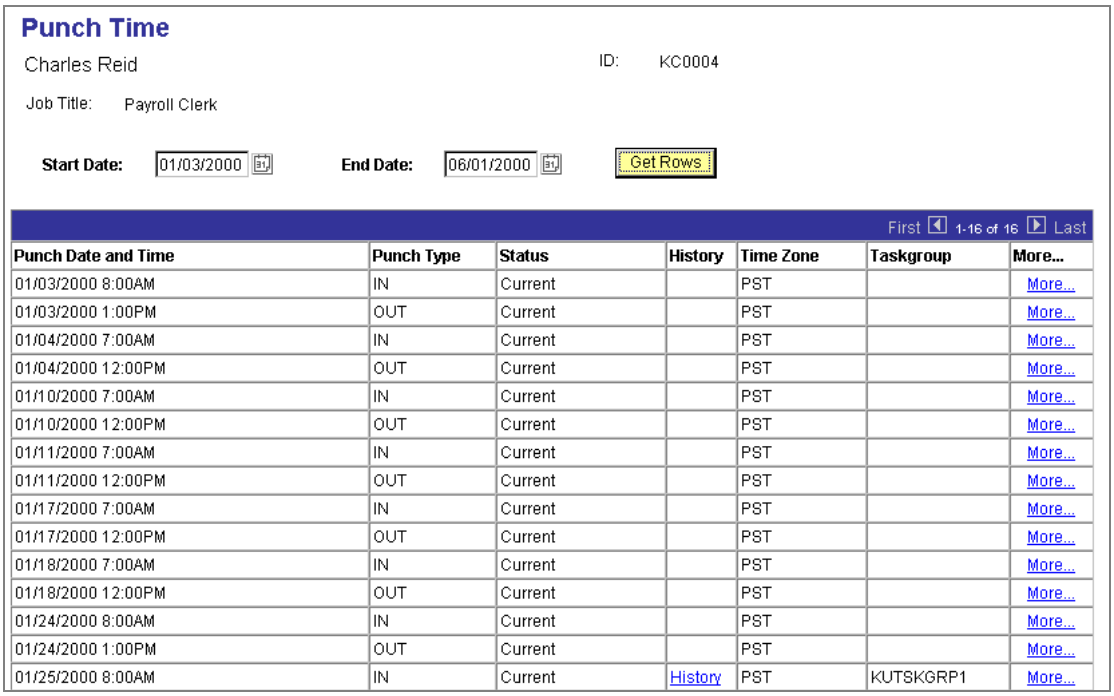
Elapsed Audit History Sec page (3 of 3)

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.

Viewing Punch Time Audit Changes

Access the Punch Time page.



Punch Time

Charles Reid ID: KC0004

Job Title: Payroll Clerk

Start Date: 01/03/2000 End Date: 06/01/2000 Get Rows

First 1-16 of 16 Last

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

Start Date
End Date
Enter the start and end date for the time that you want to view. The system populates the fields with the data for all time reported between the start and end dates.

Get Rows
Click after you enter the start and end dates. The system retrieves the data for all the reported time, including changes, that were reported on and between the start and end dates.

Punch Date and Time
Displays the date and time the punch was reported.

Punch Type
Displays the type of punch for the reported time.

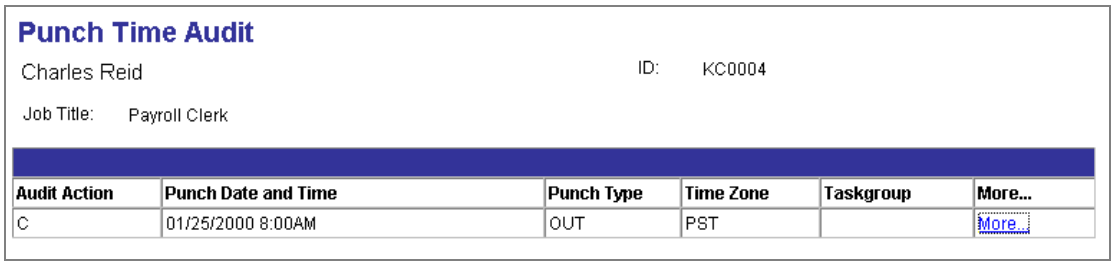
Status
Displays whether the time is ***current*** or was deleted. If the status is ***current***, the system displays either the originally reported time, the latest change to the originally reported time, or time that has been added since the time was originally reported. If the status is ***deleted***, the system displays the time that was deleted.

History
Click 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 link and available, then changes have occurred to the time, and you can view them by clicking on this link.

Taskgroup	Displays the Taskgroup ID for the reported time that is considered current.
More	Click to see details about the ***current*** or ***deleted*** reported punch time.

Viewing Punch Time Audit Details

Access the Punch Time Audit page.



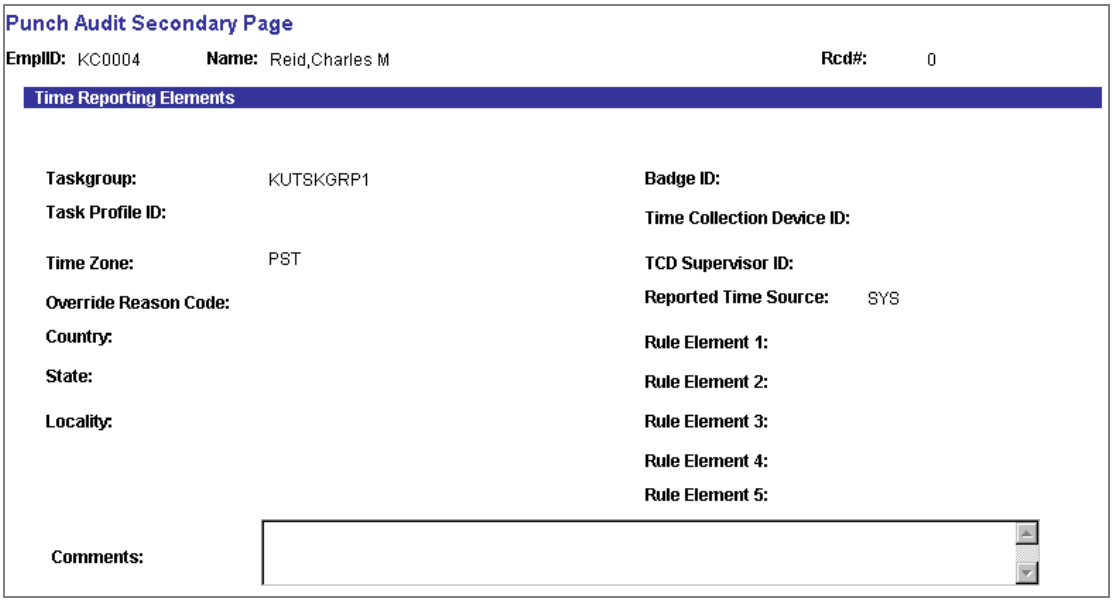
Punch Time Audit page

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.

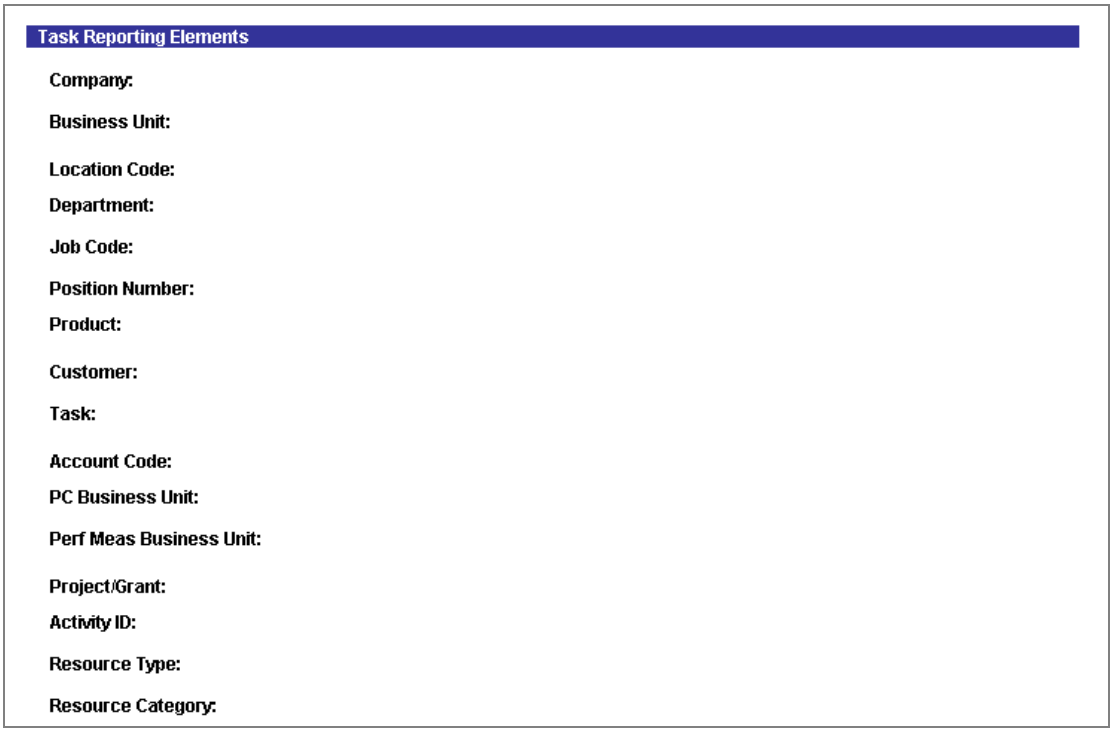
See the Elapsed Time Audit Secondary page for an explanation of the other elements.

View Details About Reported Punch Time

Access the Punch Audit page.



Punch Audit page (1 of 3)



Punch Audit page (2 of 3)



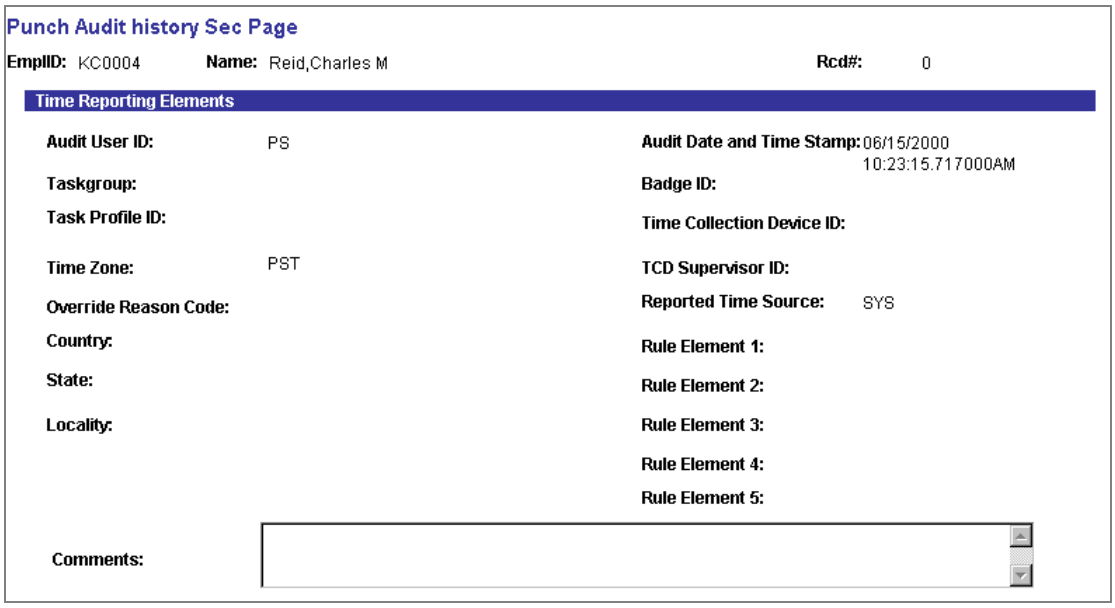
Punch Audit page (3 of 3)

The elements for the Punch Audit Secondary page are the same as the ones that appear on the Elapsed Audit Secondary page.

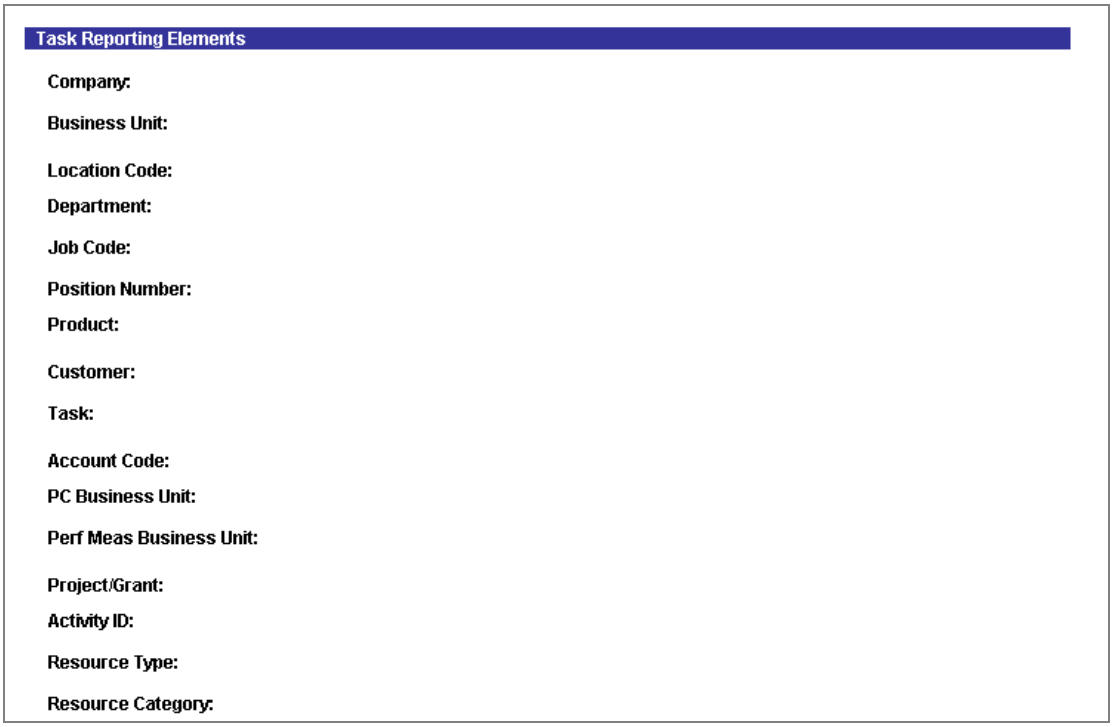
See the Elapsed Audit Secondary page for an explanation of these elements.

Viewing Further History About Time Changes

Access the Punch Audit History page.



Punch Audit History Sec page (1 of 3)



Punch Audit History Sec page (2 of 3)



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 these elements.

Overriding Rules for a Day

This section discusses how to override rules for a time reporter for a day. The Override Rules page tells the system to bypass rules processing for the day for the time reporter. Time Administration sends 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 extracts 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.

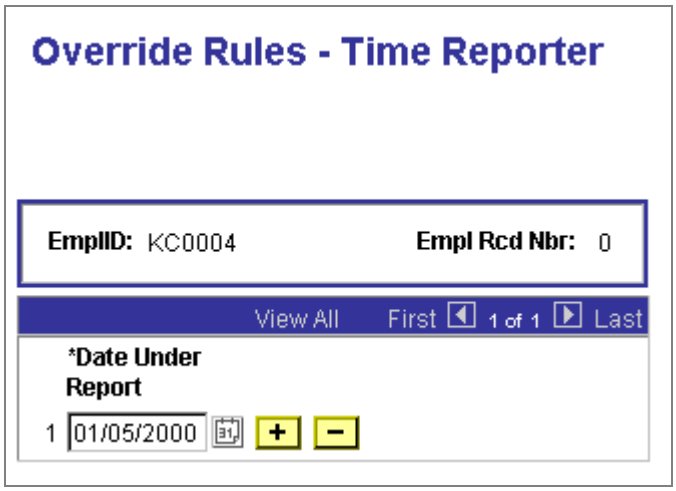
Note. You must enter time exactly how you want your time reporter to get paid, including overtime hours, using one of the time reporting pages when you want to override rules for a day.

Page Used to Override Rules for a Day

Page Name	*Object Name*	*Navigation*	*Usage*
Override Rules - Time Reporter	TL_RULES_OVR_PAGE	Administer Workforce, Capture Time and Labor, Manage, Override Rules - Time Report	Stop Time Administration from processing any rules against the time for the day.

Stopping Rules Processing for a Day

Access the Override Rules - Time Reporter page.



Override Rules - Time Reporter page

Date Under Report Enter the date of the day for which you want Time Administration to bypass rules processing.

See Also

"Creating Rules in Time Administration"

"Understanding Batch Processing in Time Administration"

CHAPTER 17

Integrating With Payroll Applications

PeopleSoft Time and Labor transmits the 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 compensates time reporters for their payable time and—at the end of the pay run—sends labor-related costs back to Time and Labor, where they are distributed across payable time and made available to PeopleSoft Projects and other applications.

This chapter provides an overview of payroll integration and discusses how to:

- Integrate PeopleSoft Time and Labor with PeopleSoft Payroll for North America.
- Integrate PeopleSoft Time and Labor with PeopleSoft Global Payroll.

See Also

"Understanding Payable Time"

Overview of Payroll Integration

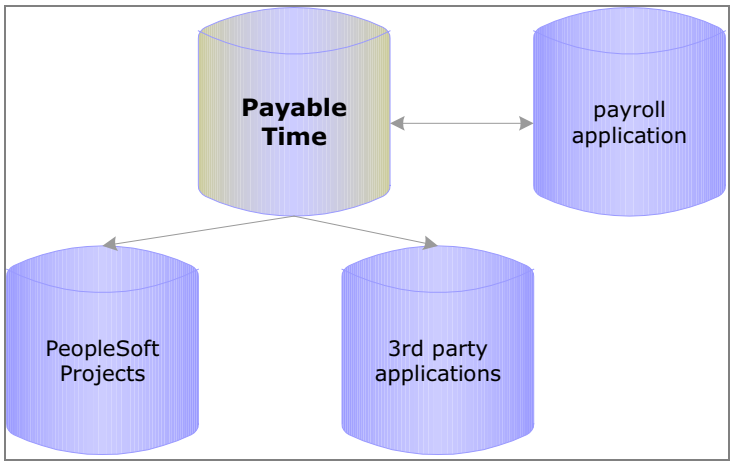
Before using your payroll system to pay employees for time reported in PeopleSoft Time and Labor, you must integrate your systems. This entails:

- Mapping time reporting codes (TRCs) to your payroll system's earnings codes
- Selecting 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 for other products to use. 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.

Note. 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 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 runs the Time Administration process to create payable time for the work groups with time reporters to pay.

2. In the payroll system, a user sets up the calendars and run IDs for the payroll process.

   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 sent to the payroll system.

   The first time this occurs, all payable time that meets the selection criteria is sent. 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.

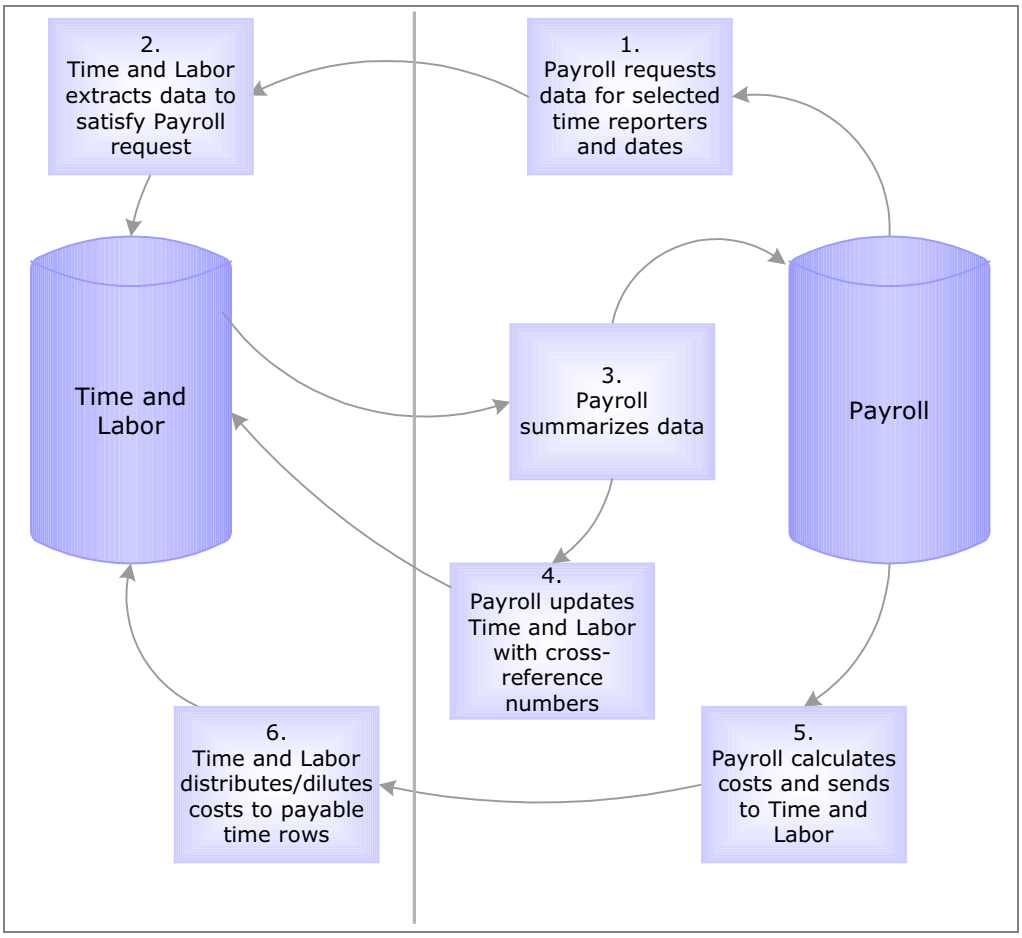
   Summarization consists primarily of totaling reported hours, units, or amounts at the earnings code or task code level. Each payroll system has its own rules for summarizing data. Pay calculations are run and the payroll cycle is completed.

5. The payroll system sends cost data generated by the pay run back to PeopleSoft Time and Labor.

6. The Labor Distribution and Dilution processes are invoked in PeopleSoft Time and Labor if you have selected these features.

- The Labor Distribution process attaches the costs calculated by your payroll system to the corresponding payable time entries in PeopleSoft Time and Labor
- The Labor Dilution process 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 of the Time and Labor self-service component. The following diagram illustrates the process flow.



Process flow when PeopleSoft Time and Labor is integrated with a payroll application

See Also

Understanding Payable Time

Using Self Service Components

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 for additional processing.

Allocating costs back to payable time is *labor distribution.* Labor distribution is an optional feature of PeopleSoft Time and Labor that you can select on the Payroll System page. Select one of two options.

- Labor distribution only.

  This option enables you to allocate payroll costs back to the tasks for which payable time was originally reported, provided you defined the 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: Effect 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

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 10.00 USD per hour; overtime is paid a rate of 19.00 USD per hour. Payroll sends the costs back to PeopleSoft 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

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 equitable, given that the time reporter could have worked on the projects in any order.

The Labor Dilution process distributes costs more evenly. 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.

Date	Hours	Rate	TRC	Project	Diluted Cost
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

- The Labor Distribution process allocates costs back to payable time entries according to the level of detail supported by the payroll system.

  The criteria that 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, the Labor Distribution process:

  - Allocates the amounts that were originally reported back to TRCs with an amount type.
  - 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) populates 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) used to calculate estimated gross populates 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

Integrating PeopleSoft Time and Labor with PeopleSoft Payroll for North America comprises the following tasks:

1. Preparing PeopleSoft Time and Labor data.
2. Loading PeopleSoft Time and Labor data.
3. Running the payroll process.
4. Extracting costs after a pay run.
5. Adjusting payable time.
6. Refreshing data.
7. Correcting errors generated during the load and extract processes.
8. Configuring PeopleSoft Time and Labor for use with PeopleSoft Payroll for North America.

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 PeopleSoft Time and Labor to create payable time for the time reporters 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 PeopleSoft Payroll and send to PeopleSoft 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 PeopleSoft Time and Labor. All other interactions are initiated through PeopleSoft Payroll for North America.

Preparing Time and Labor Data for Payroll for North America

Before a payroll user starts the payroll process, you must run the Time Administration process for the population of time reporters to be paid.

Note. PeopleSoft Payroll for North America uses pay groups to define the population of employees to be paid. Before a pay run, verify that the Time Administration process has run for all members of the pay groups to be paid.

See Also

"Understanding Batch Processing in Time Administration," Launching the Time Administration Process

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 PeopleSoft Payroll for North America.
- Running the preliminary Pay Calculation process.

  This option is available only if you've configured PeopleSoft Human Resources for automatic loading.
- Requesting a final check or online check.

If your payroll department prepares paysheets several days before 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 be quickly loaded into the paysheets when you run the preliminary Pay Calculation process, assuming that the automatic load feature is enabled.

The load process consists of several steps:

- Selecting payable time entries in PeopleSoft Time and Labor.
- Passing payable time entries to payroll.

- Consolidating payable time entries.
- 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, Time and Labor 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 PeopleSoft Time and Labor to load payable time 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)

  * 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. PeopleSoft Time and Labor loads payable time for closed entries if the Pay System flag is set to *NA*. Closed entries are first set to *RP* by the refresh request and are then reselected. Refresh requests should be used only when payable time data has become corrupted or lost.

  Time with a payable status of *NA* (needs approval) is never selected.
- 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.
- The currency used in PeopleSoft Time and Labor matches the currency defined for the pay group in PeopleSoft Payroll for North America when the reported quantity is an amount.

How PeopleSoft 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* for payable time entries that have a payable status of *ES*, *AP*, or *RP*.

  If the entry has already been labor-distributed or labor-diluted, it retains its current payable status of *PD* or *DL*. If the entry currently has a payable status of *CL* , 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 PeopleSoft Payroll, PeopleSoft Time and Labor sets the payable status to *RP*.

Note. 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

Paysheets are the pages and tables that contain all current payroll information—earnings, deductions, hours, taxes, and other accounting data—for the specified employees and pay period. When payable time entries are loaded into PeopleSoft Payroll for North America, they are summarized according to the 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 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, or state.

Note. If PeopleSoft Time and Labor passes an override rate to PeopleSoft Payroll for North America, and a rate already exists on the earnings code definition, the rate on the earnings code definition takes 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 takes precedence.

PeopleSoft Payroll for North America keeps track of how it consolidates payable time and tracks the combined entries by passing back a payroll cross-reference (XREF) number to PeopleSoft Time and Labor for each Time and Labor sequence number. At the same time, the system:

- Updates entries with a payable status of *SP* to *TP, RP,* or *CL* if labor distribution is not enabled.

  When payable status is set to *CL,* 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.

See Also

"Understanding Payable Time"

Configuring for Integration with PeopleSoft Payroll for North America

Configuring PeopleSoft Time and Labor and PeopleSoft Human Resources

Refreshing Data

PeopleSoft Payroll for North America PeopleBook, "Defining Your Organizational Framework" and "Administering Interfaces," Preprocessing Time and Labor Interface

Running the Payroll Process

After creating paysheets, it's time to run the payroll. A payroll user runs the Pay Calculation and the Pay Confirmation processes as usual.

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, PeopleSoft Payroll for North America changes the payable status of PeopleSoft Time and Labor entries from *TP* to *RP* and resets the payroll request number to *0.* Entries with a payable status of *PD* or *DL* retain their payable status, but the payroll request number is set to *0.* Resetting the payroll request number enables Payroll for North America to reselect the time. (Only time that has a payroll request number of *0* is selected.)

Extracting Costs After a Pay Run

After loading payable time into PeopleSoft Payroll for North America and running and confirming the payroll calculation process, extract costs from the payroll system into PeopleSoft Time and Labor. Payroll for North America extracts cost data that was generated through:

- On-cycle and off-cycle pay runs.
- Check reversal or adjustment. (The cost associated a reversal will be zero.)

- Final check.
- Online check.

Run the Extract process, which is initiated in PeopleSoft Payroll for North America, at any time, as long as the pay run is 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 PeopleSoft Time and Labor as follows:

- If the payable time is distributed, but not diluted, the Extract process changes the payable status to *PD*.
- If the payable time is distributed and diluted, the Extract process changes the status to *DL*.
- If the time is neither distributed nor diluted, the Extract process sets the status *CL*.
- Provides the cross-reference (XREF) numbers generated during the consolidation process, the calculated costs, and percentages that represent how payroll consolidated the payable time rows.

The system uses percentages when the consolidation process is not clean.

- Triggers the Labor Distribution and Labor Dilution processes in PeopleSoft Time and Labor, if applicable.
- Sets the publish date and publish switch.

Example: Percentages Returned by the Extract Process

Of a time reporter's total hours, 75 percent are subject to New York state tax and 25 percent are subject to Connecticut state tax. In this case, the consolidation process creates two pay earnings rows for the individual—one for each state. The Extract process would return the percentages along with the resulting costs, so PeopleSoft Time and Labor can distribute the costs during the Labor Distribution process.

Distributing and Diluting Costs

Costs are always distributed across payable time for the current period, prior period adjustments, and advance payments. You can view distributed and diluted costs on the Payable Time Detail page in the Time and Labor self service transactions.

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 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 that are closed, paid, diluted, or distributed are published automatically to Projects after running the extract job.

See Also

"Integrating With PeopleSoft Financials"

Adjusting Payable Time

Normal Adjustments

Normal adjustments to payable time are changes or additions to payable time using any of the time reporting pages. If you make normal adjustments after loading payable time into PeopleSoft Payroll for North America, run the Time Administration process again so that the changes are sent to PeopleSoft 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 *AP, CL,* or *SP*), 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 and a row that offsets the original entry. Both the new and offsetting rows are sent to PeopleSoft Payroll when you next load payable time.

Record-Only Adjustments

Record-only adjustments entered on the Record Only Adjustment page are not passed to PeopleSoft Payroll for North America; however, they can affect the results of the 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 rerun Labor Distribution, no cost is distributed for the adjusted record.

  An error message will display the sequence number of the payable time entry that isn't redistributed.

- 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 are copied to both the offset row and the new row.

  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 *CL*.

See Also

"Managing Time," Adjusting Time

"Integrating With PeopleSoft Financials"

Refreshing Data

A Refresh Request option in PeopleSoft Payroll for North America enables users to reselect all payable time 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 *ES, CL, SP,* or *RP*. 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.

See Also

Payroll for North America PeopleBook, Administering Interfaces

Correcting Errors Generated During the Load and Extract Processes

Load Process Errors

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 in the following table. In all cases, PeopleSoft Payroll changes the payable time status to *RP*. Correct the error, run the Time Administration process again, if necessary, and advise the payroll clerk to rerun the Paysheet Update process.

Error	*Action*
Invalid Mapping of TRC to NA Earnings Code	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	Correct the currency on the TRC page. PeopleSoft Time and Labor does not perform any currency conversion.

Other reasons that payable time can be rejected are:

- A time reporter is not active in JOB.
- A time reporter has changed paygroups in the pay period that is being processed.
- The TRC in payable time is mapped to an earnings code in PeopleSoft Payroll for North America that is not in the time reporter's earnings program.
- You run PayUnsheet and all payable time is set to a payable status of *Rejected*.
- Reported state and locality overrides are not found in the Employee Tax Data tables.

Note. 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.

Extract Process Errors

Error	*Action*
Multiple currencies cannot be distributed.	Depending on the source of the error, adjust the currency for the reported time in PeopleSoft Time and Labor or change the currency for the entry in PeopleSoft Payroll for North America.

Configuring for Integration 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.

To configure PeopleSoft Time and Labor for integration with Payroll for North America:

1. On the Payroll System page, select the distribution features to use for PeopleSoft Payroll for North America.

   By default, Labor Distribution is selected and Labor Dilution is not.

2. On the TRC1 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 don't occur.

Note. 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 PeopleSoft Payroll for North America.

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 nonemployees.

To configure PeopleSoft Human Resources for integration with PeopleSoft Payroll for North America:

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* (exception hourly) or *H* (hourly).

   If the Employee Type field on the Job Data - Payroll Page is set to *S (*salaried*),* any hours mapped to the default REG earnings code aren't loaded to paysheets. However, costs are labor-distributed across these hours if the Distribute Costs option is selected for the TRC. Select *E* or *H.* This enables the system to send updated costs for prior period adjustments to payroll and your general ledger application. If you set up employees with *S,* PeopleSoft Time and Labor populates the labor distribution amount and the diluted gross amount with an estimated gross for these entries. These entries are available as actual costs to publish to PeopleSoft Projects, but don't flow through PeopleSoft Payroll for North America to your general ledger application.

3. On the Product Specific page, in the Installation Table component, select the PeopleSoft Time and Labor and PeopleSoft Payroll for North America paysheet options.

   We recommend that you:

   - Select the Refresh on Job Change and Load in Preliminary Calc (load in preliminary calculations) options.

     These options enable the system to automatically load 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, pay group, or employee status) causes the system to reload payable time into the payroll system when rebuilding the paysheet.

     If you select the Load in Preliminary Calc option, PeopleSoft Payroll for North America automatically loads PeopleSoft Time and Labor data each time that 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 control whether users can make paysheet changes to data retrieved from PeopleSoft Time and Labor. Any changes made directly to the paysheets isn't transmitted back to PeopleSoft Time and Labor.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Setting Up Implementation Defaults

PeopleSoft Payroll for North America PeopleBook, "Administering Interfaces," Preprocessing Time and Labor Interface

Integrating With PeopleSoft Global Payroll

Integrating PeopleSoft Time and Labor with PeopleSoft Global Payroll comprises the following tasks:

1. Planning which rules each system applies.
2. Retrieving absence data from PeopleSoft Global Payroll for use as criteria within the rules processed by Time Administration.
3. Preparing PeopleSoft Time and Labor data for PeopleSoft Global Payroll.
4. Loading PeopleSoft Time and Labor data.
5. Correcting errors generated by payable time.
6. Updating payable time after a pay run.
7. Sharing work schedules with PeopleSoft Global Payroll.
8. Configuring PeopleSoft Time and Labor for use with PeopleSoft Global Payroll.

Note. When using PeopleSoft Global Payroll with PeopleSoft 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 to be paid.

3. Run the payroll process.

   This automatically loads payable time from PeopleSoft Time and Labor.

4. Finalize the pay run.

5. Run the Time and Labor process to distribute payroll costs to payable time rows in Time and Labor.

   You can run both Labor Distribution and Labor Dilution, based on the settings on Time and Labor's Pay System page.

Perform steps 1 and 2 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* 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 PeopleSoft Global Payroll, 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, record the absence through Absence Entry page in PeopleSoft Global Payroll. This creates a row of data in the GP_ABS_EVT_WRK table, which gets loaded into PeopleSoft 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 PeopleSoft Global Payroll.

Note. Although PeopleSoft Time and Labor can use absences reported in PeopleSoft 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 only view absences reported through Global Payroll using the Weekly Elapsed Time page.

After the Time Administration process has run, a payroll user can start 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 starts 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.

Note. If you use the validation set delivered with PeopleSoft Time and Labor, absences entered before a time reporter's hire date 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 capable of executing some of the same types of rules. Before integrating the two products, 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.

Decide on a strategy for mapping time reporting codes to earnings elements. Consider the following options:

- Define one earnings element that accumulates to gross.

  This is the earnings element the payroll process uses 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 other costs (such as an employer-paid health insurance premium). 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.

  Time from Time and Labor can be reported in hours, units or amounts, based on TRC type. When mapping TRCs to earnings elements, consider how the TRC type corresponds to the calculation rule defined for the element.

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 PeopleSoft 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 partial hours for absences that are less than a full day (when applicable). 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. 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 the system from processing rules for the time reporter for the dates indicated in the table.

- Starts the Submit process, which converts the absence data to reported time.

- Starts the Time Administration process, which converts the reported time to payable time.

Absence data cannot be altered in PeopleSoft 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.

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.

Note. Absence data that is sent to PeopleSoft 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.

Example: Absence Data

Assume a time reporter is scheduled to work 8 hours a day, Monday through Friday. An absence event is entered in PeopleSoft 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

PeopleSoft 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.

See Also

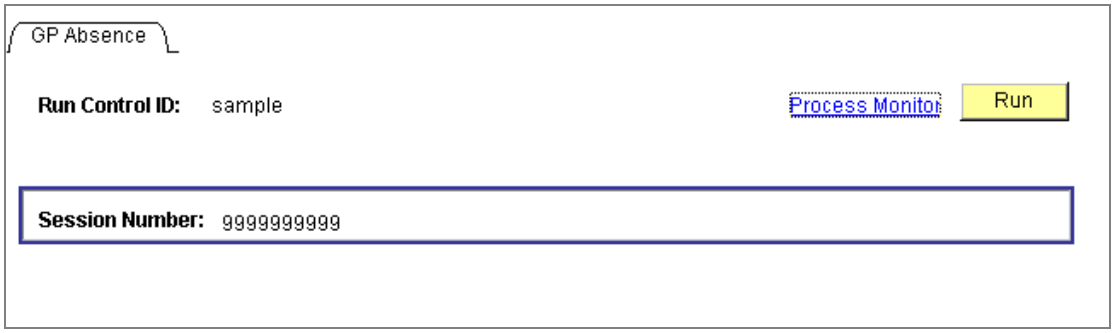
Sharing Work Schedules With PeopleSoft Global Payroll

Page Used to Retrieve Absence Data

Page Name	Object Name	Navigation	Usage
GP Absence	TL_RCTRL_AGG	Administer Workforce, Capture Time and Labor, Process, Global Payroll Absence	Initiate a batch process that retrieves absence data from PeopleSoft Global Payroll.

Retrieving Absence Data

Access the GP Absence page.



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 Displays the session number the system automatically assigns to the batch process.

Run Click to run this request. Process Scheduler runs the TLAGGUPDATE process at user-defined intervals.

See Also

PeopleTools PeopleBook: Process Scheduler

Preparing Time and Labor Data for PeopleSoft Global Payroll

Before a payroll user starts a 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 use the Payroll/Absence Run Control page to initiate loading payable time into PeopleSoft Global Payroll.

When a user starts the Identify phase of the payroll process, it identifies the time reporters who have payable time during the time period defined by pay calendar.

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
    - AP
    - SP
    - RP
    - For retro periods entries, any payable status *except*:
        - NA
        - *CL* when the Pay System field is not set to *GP*.
- The employee has been set up for payroll processing and the TRC associated with the payable time has been mapped to an earnings or absence take element.
- The TRC is mapped to the calendar's run type (on Global Payroll's Run Type page.)

PeopleSoft Global Payroll also updates each payable time entry as follows:

- For payable time entries loaded into PeopleSoft Payroll:
    - Sets the payable status to *SP*, unless it already reads *PD* or *DL*.
    - Sets the PeopleSoft Time and Labor Pay System flag to *GP*.
- For payable time entries not accepted by PeopleSoft Payroll:
    - Sets the payable status to Rejected by Payroll.

      The Time Administration process 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* and *NA*.

      When Time and Labor creates an offset as the result of an adjustment to payable time, Global Payroll ignores the original row of payable time and the offset row and processes the newly created row. The adjustment generates a retro trigger in

PeopleSoft Global Payroll, which causes the pay period to be recalculated and corrected in either the current pay period or in a forwarding period.

- 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.

Note. 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 passes to PeopleSoft Time and Labor 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 user starts 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.

When a Pay Run is Canceled

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* unless the following are true:

- Payable status is *PD, DL,* or *TP.*
- 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 PeopleSoft Time and Labor back into its generated positive input table. Payable time that was adjusted in Time and Labor has 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.

See Also

Configuring PeopleSoft Time and Labor and PeopleSoft Human Resources

"Understanding Payable Time"

Correcting Errors Generated by Payable Time

After a preliminary pay run is complete, review the Payable Status report for payable time entries that PeopleSoft Global Payroll rejected. Errors that are most likely to occur result from incorrect TRC mapping to Global Payroll earnings and deduction elements. Because Global Payroll rejects incorrectly mapped entries during the calculate phase of processing, you see the rejected items on the Payable Status report—not 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. Other reasons that payable time may be rejected by Global Payroll include the use of the wrong or no Time and Labor processing period; an employee being inactive in the pay entity; cancellation of the pay run, or the TRC being omitted from the run type.

Correct discrepancies that are caused by Time and Labor data in the 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 PeopleSoft Time and Labor. The actions that the batch process performs depend on whether the Labor Distribution and Labor Dilution features are enabled in Time and Labor.

Labor Distribution and Labor Dilution Disabled

During the batch process, PeopleSoft Global Payroll does the following:

- Changes the payable status to *CL* for each entry coded *SP* 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,* unless the record was previously sent to another payroll system.

Global Payroll doesn't process a payable time entry when a user manually enters positive input for the same earnings or deduction element. User-entered positive input always takes precedence.

For each entry with a payable status of *SP* that was successfully processed, the batch process:

- Changes the payable status to *TP*.
- Sets the Pay System flag to *GP*.
- Sets the Frozen flag to *Yes* and the frozen date to the current date.

PeopleSoft Global Payroll also sends the cost data associated with payable time entries to PeopleSoft Time and Labor. It also returns the original Time and Labor sequence number for each payable time entry and the corresponding cross-reference numbers that Global Payroll generated during the bundling process. The cross-reference numbers indicate 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.

See Also

"Setting Up Basic Tables," Payroll System Options

Sharing Work Schedules With PeopleSoft Global Payroll

PeopleSoft Time and Labor and PeopleSoft Global Payroll use many of the same pages and records for schedule setup and assignment. In some cases, the page names vary slightly. If you're using both applications, you need to create and assign schedules only once. However, the information displayed on the scheduling pages may vary somewhat, depending on which application you access them with:

- When you access the Assign Schedule page through PeopleSoft Time and Labor, you don't 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 appears 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 in PeopleSoft Global Payroll.

In PeopleSoft Time and Labor, a payee's default schedule is based on a work group; in PeopleSoft Global Payroll, the default schedule is based on paygroup. The page views differ when a payee is set up to use the default schedule, and the paygroup and workgroup have different default schedules.

See Also

"Setting Up Time Reporters," Assigning Schedules

"Defining Work Schedules," Creating Work Schedules, Schedule Templates, and Schedule Definitions

"Using Self Service Components," Managing Employees' Schedules, Overriding an Employee's Schedule

Configuring PeopleSoft Time and Labor and PeopleSoft Human Resources

To set up PeopleSoft Time and Labor:

1. For each type of payable time to send to PeopleSoft Global Payroll, map the TRC to the appropriate earnings, deduction, or absence take element defined in Global Payroll.

   Use the TRC 1 page to map TRCs to elements. The system selects the Send to Payroll option on the TRC Setup page 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 PeopleSoft Global Payroll to send costs generated by a pay run back to PeopleSoft Time and Labor so that 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, verify that the Payroll System field on the Payroll page is set to *PeopleSoft Global Payroll.*

2. Repeat step 1 for nonemployees if you want to send their payable time to the payroll system.

See Also

"Establishing Time Reporting Codes"

"Setting Up Basic Tables," Payroll System Options

"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data

PeopleSoft Global Payroll PeopleBook, "Working With Interfaces"

CHAPTER 18

Integrating With PeopleSoft Financials

This chapter provides an overview of integrating PeopleSoft Time and Labor with PeopleSoft financial applications and discusses how to:

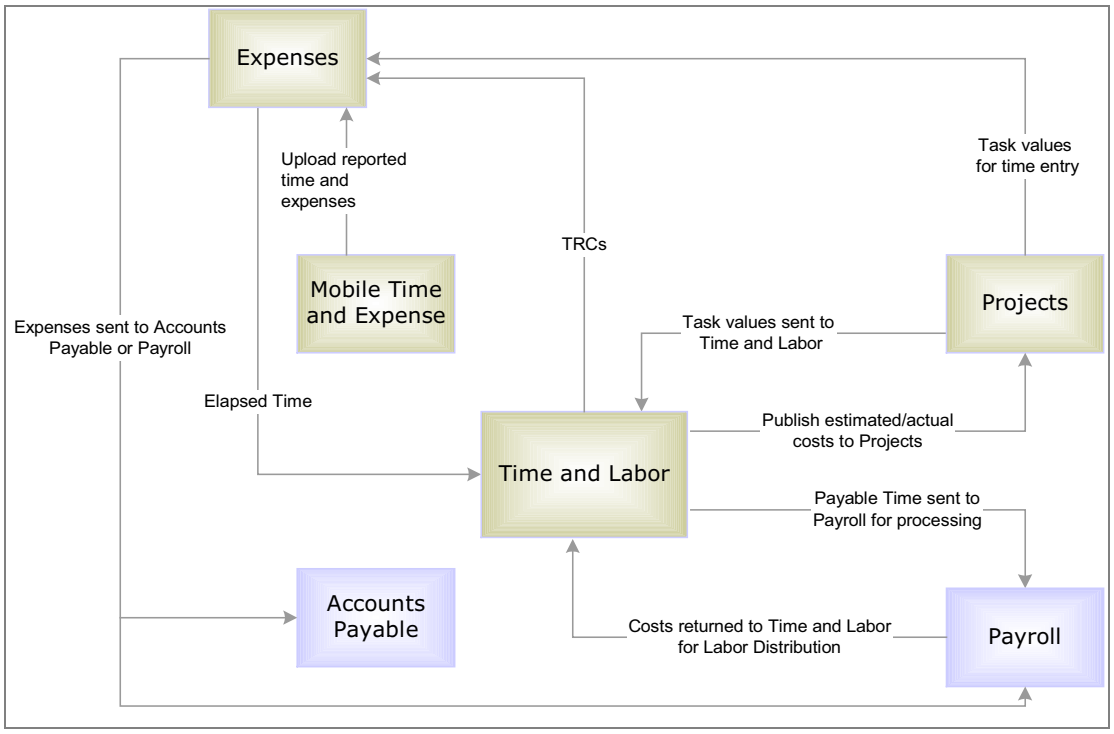
- Integrate with PeopleSoft Projects.
- Use Commitment Accounting functionality with task reporting to track labor costs at the ChartField level.
- Enable time reporters to report time to the business units and activities defined in PeopleSoft Enterprise Performance Management (EPM).
- Integrate with PeopleSoft Mobile Time and Expense through PeopleSoft Expenses.

See Also

"Defining Task Reporting Requirements"

Understanding Integration

The following illustration shows how you might integrate PeopleSoft Time and Labor with other PeopleSoft applications to provide an enterprise-wide solution for time collection, project costing, and compensation.



Integrating PeopleSoft Time and Labor with PeopleSoft Financials applications

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 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.

Note. Integration with PeopleSoft Financials uses additional EIPs that are controlled by the Financials applications.

The Enterprise Integration Points (EIPs)

Time and Labor Actual Time

Time and Labor Estimated Time

Time and Labor TRC Information

Note. To research the technical details of any EIP used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of the Customer Connection website.

See Also

PeopleTools PeopleBook

PeopleSoft Projects PeopleBook

PeopleSoft Expenses PeopleBook

PeopleTools PeopleBook: Integration Tools

PeopleSoft Projects Integration

This section provides an overview of PeopleSoft Projects integration and discusses how to set up PeopleSoft Time and labor with PeopleSoft Projects.

Understanding PeopleSoft Projects Integration

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 the PeopleSoft Time and Labor task reporting functionality and integrate Time and Labor with Projects, you can:

- 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 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.

You can also 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.

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 and 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; *Y* if the time is sent to a payroll system.

See Also

PeopleSoft Projects PeopleBook, "Gathering Time and Labor Costs"

Commitment Accounting

Understanding Payable Time

Setting Up Time and Labor for Use With PeopleSoft Projects

To integrate PeopleSoft Time and Labor with PeopleSoft Projects, you:

- 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. PeopleSoft recommends 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.

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.

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.

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.

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.

Note. 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. (SETID messages published from the PeopleSoft Financials database to the HRMS database add to, rather than delete existing data in HRMS.)

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.

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.

See Also

PeopleSoft Projects PeopleBook, "Setting Up Projects"

"Understanding Batch Processing in Time Administration," Step 9 - Performing Post Rules Processing, Calculate Estimated Gross

"Setting Up Time Reporters"

"Defining Task Reporting Requirements," Understanding Task Reporting Requirements, Understanding Task Reporting with PeopleSoft Financials

"Creating Rules in Time Administration"

Publishing Estimated and Actual Cost Data to PeopleSoft Projects

This section presents an overview of publishing estimated and actual cost data to PeopleSoft Projects and discusses how to:

- Publish estimated payable time.
- Publish actual payable time.

Understanding Sending 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.

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. 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. In this case, PeopleSoft Time and Labor publishes only closed payable time records that will not be run through the Labor Distribution process.

- 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 in the following section.

When PeopleSoft Time and Labor is integrated with PeopleSoft 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 started 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, modify payable time, and then rerun the payroll, you can start the Extract process again. This process publishes all payable time that has a payable status of *Closed, Paid – Labor Distributed*, or *Paid – Labor Diluted*.

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 initiated automatically at the end of the update process that you start through the Time and Labor Run Control page in Global Payroll. This process also publishes all payable time that has a payable status of *Closed, Paid–Labor Distributed*, or *Paid –Labor Diluted.*

Pages Used to Send Estimated and Actual Costs Data to PeopleSoft Projects

Page Name	*Object Name*	*Navigation*	*Usage*
Publish Estimated Payable Time	TL_RUN_PUB_TIME	Administer Workforce, Capture Time and Labor, Process, Publish Est Payable Time	Initiate the transmission of estimated costs if the version of PeopleSoft Projects you are using retrieves data through flat files. Also 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.
Publish Actual Payable Time	TL_RUN_PUB_ACTUALS	Administer Workforce, Capture Time and Labor, Process, Publish Act Payable Time	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.)

Publishing Estimated Payable Time

Access the Publish Estimated Payable Time page.

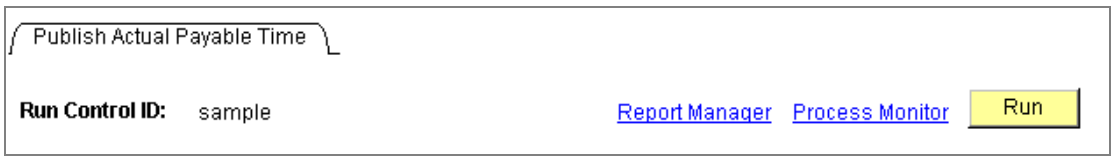


Publish Estimated Payable Time page

Run Click to initiate the TL_PUB_TM_AE process.

Publishing Actual Payable Time

Access the Publish Actual Payable Time page.



Publish Actual Payable Time page

In PeopleSoft Payroll for North America, you must confirm the pay run before publishing cost data.

Run Click to initiate the TL_PY_PUB_TM process.

See Also

"Understanding Batch Processing in Time Administration," Step 9 - Performing Post Rules Processing, Calculate Estimated Gross

PeopleSoft Projects PeopleBook, "Understanding Integration with PeopleSoft Time and Labor"

"Integrating With Payroll Applications"

PeopleTools PeopleBook: Process Scheduler

Commitment Accounting

Commitment accounting, part of the Commitment Control feature in PeopleSoft Financials, 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 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 enables 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.

See Also

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting

PeopleSoft 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 defined for commitment accounting.

When time reporters enter their time, they must provide an account code, and 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

Note. 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.

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.

See Also

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting, "Commitment Accounting Processing Control Tables," Setting Up Valid Account Codes

Setting Up Time and Labor for Use With Commitment Accounting

To integrate PeopleSoft Time and Labor with the commitment accounting functionality, you must:

- 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 in this section.

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.

When you then 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.

Use the task reporting pages in PeopleSoft Time and Labor to create:

- 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.

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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Companies, Agencies, and Locations," Maintaining Departments

"Defining Task Reporting Requirements"

"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data TLcomB05.doc - PBT_0415010249360000000000000084753

Distributing Costs after a Pay Run

After you confirm a pay run in Payroll for North America, run the Actuals Distribution process with PeopleSoft Time and Labor. This process, which you start 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 after they reach the frozen state. You can then use the data within your financial analyses.

See Also

"Setting Up Basic Tables," Setting Up System Defaults and Loading Dates

PeopleSoft Expenses With Mobile Time and Expense

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.)

Note. Both PeopleSoft Time and Labor and Expenses can send reported time directly to PeopleSoft Projects. To avoid sending the same data twice, PeopleSoft recommends 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.

Note. 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 adjustments to prior time periods.

See Also

PeopleSoft Mobile Time and Expense PeopleBook

Setting Up Time and Labor for Use With Mobile Time and Expense

To integrate PeopleSoft Time and Labor with Mobile Time and Expense, perform the following actions:

- Ensure that remote users are set up as time reporters in PeopleSoft Time and Labor.
- Publish TRC information to the PeopleSoft Financials database.

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*.

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 though 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.

Note. 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.

See Also

PeopleSoft Mobile Time and Expense PeopleBook

"Setting Up Time Reporters," Entering and Maintaining Time Reporter Data

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 published to Time and Labor.

After the entries in the staging table are ready for publication, PeopleSoft Expenses uses the same application programming interface (API) as used for the TCD interface to publish the time entries to PeopleSoft Time and Labor.

See Also

PeopleSoft Expenses PeopleBook

CHAPTER 19

Using Self Service Components

This chapter provides an overview of self service components and discusses how to:

- Use Time and Labor Launch Pad pages.
- Manage employees' schedules.
- Report time.
- Manage time.

Understanding 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:** 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:** Enables the manager to view employees' work schedules or enables employees to view their own schedules.
- **Override Scheduled Workday:** Enables the manager to make an ad hoc change to an employee's schedule at the day level.
- **Weekly Punch Time:** Enables the employee or the manager to report new punch time or view or change existing time.
- **Weekly Elapsed Time:** Enables the employee or the manager to report new elapsed time or view or change existing time.
- **Mass Time Reporting:** 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.
- **Compensatory Time Balance:** Enables the employee or the manager to view compensatory time balance and compensatory time expiration information.
- **Payable Time Summary:** 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:** Enables the employee or the manager to view details about the payable time.

- **Forecasted Time Summary:** 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:** 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; therefore, we deliver definitions for these roles and define a menu for each role.

Note. In this chapter, 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 that the user can access by default. Create user profiles on the Maintain Security page in the User Profile component. 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, modify the access control list for the user's role. Define which data the user can access in the user profile.

Both the Time and Labor Launch Pad and the Mass Time Reporting pages display a list of employees. 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 static groups that you have created.

3. If you decide not to 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 is derived by determining your Department ID and then investigating who you have access to in your department, as well as 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 that 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

PeopleTools PeopleBook: Security, "Understanding PeopleSoft Security"

Using Time and Labor Launch Pad pages

In this section, we discuss using Time and Labor Launch Pad pages and explain how to:

- Specify employee information.
- View employee hours.
- Set up application items.
- View detailed calendar information.

Pages Used to Specify Time and Labor Launch Pad Information

Page Name	*Object Name*	*Navigation*	*Usage*
Time and Labor Launch Pad Search	TL_LPAD_MSS_EE	Self Service, Manager, View, Time and Labor Launch Pad	Specify the employee for whom you want to view information. View 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.

Page Name	*Object Name*	*Navigation*	*Usage*
Time and Labor Launch Pad	TL_LAUNCH_PAD	• 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	View 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 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.
Application Suite	TL_APP_SUITE_PNL	Define Business Rules, Define Time and Labor, Suites, Application Suite	Set up the application items that are available to both managers and time reporters via the Go field on the Time and Labor Launch Pad Page.
Details	TL_LAUNCH_PAD_DLY	Click the date link on the Time and Labor Launch Pad Page to access the Details page.	View detailed calendar information for each day.

Specifying Employee Information

Access the Time and Labor Launch Pad Search page.



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
Danny Johnson	HRMS Analyst	KU001	KUWRKGRP5	KUTSKGRP2	KU0042	1
Danny 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

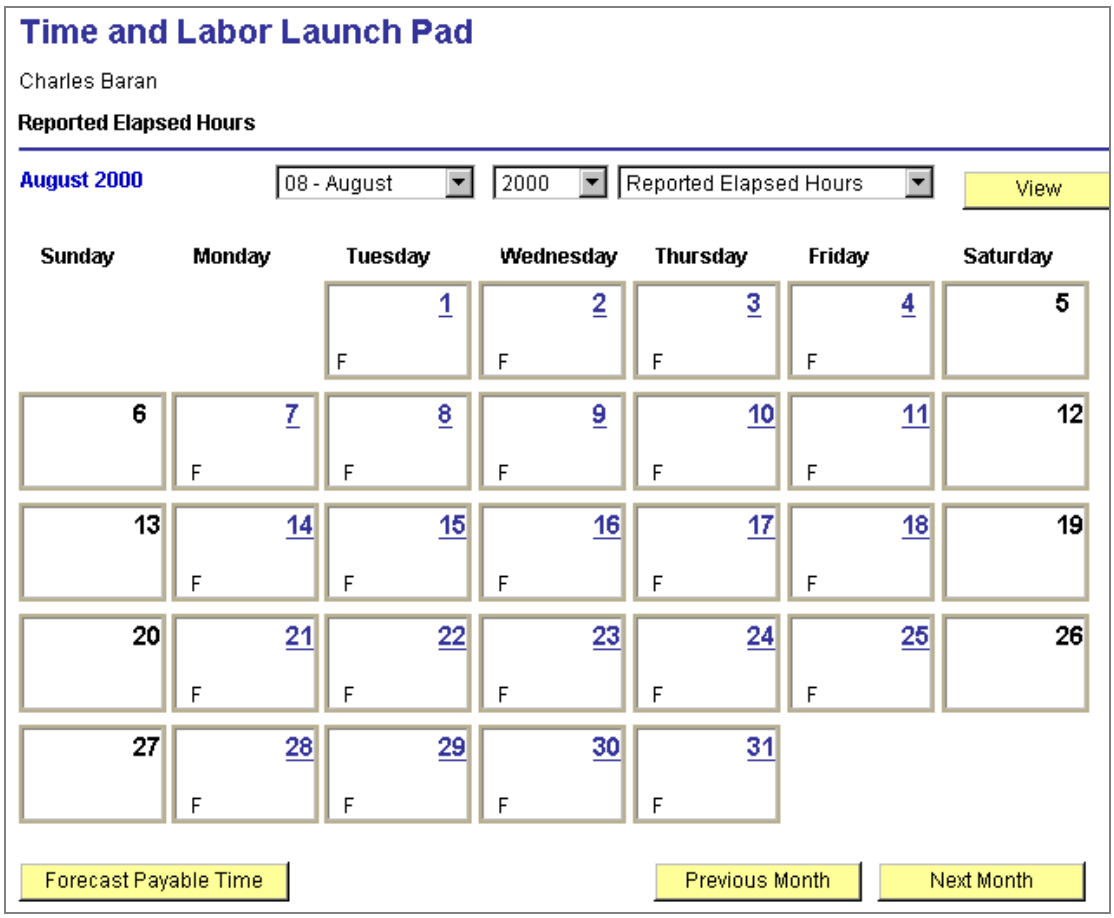
Click on an employee's name to transfer to their calendar

Time and Labor Launch Pad Search page

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, navigate to the Time and Labor Launch Pad page.

Viewing Employee Hours

Access the Time and Labor Launch Pad page.



Time and Labor Launch Pad page

When you first enter the Launch Pad page, it displays the current month and year by default. Going forward, it opens in the same state in which you last left it.

View — Select the information that you want to appear—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—and click this button.

The calendar view changes depending on what you select. For example, suppose that you select the ***Scheduled Hours*** view option and 8.00 appears for one of the days in the calendar. This means that the employee is scheduled to work 8 hours on that day.

Previous Month and **Next Month** — Use these buttons to skip to the preceding or next month.

At any given time, any day in the calendar may display the following valid values: ***X, P, E, $, F***, or ***R.*** These values indicate that there is information regarding reported time for that day.

For example, suppose ***E*** appears for one day on the calendar. This means that the employee has elapsed time reported for that day. If ***$*** appears, it means that payable time exists for that day. See the bottom of the Launch Pad page for a 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.

Forecast Payable Time Start the Forecasted Payable Time process that calculates forecasted payable time for the employee by clicking this button.

The system looks at the employee's schedule and 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 that 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, use the Go field at the bottom of the page. Select the application item that you want to navigate to from the drop-down list, click the Go button, and navigate to the feature that you selected. Depending on how the application suites are set up, different options are available for the Go field.

Setting Up Application Suites

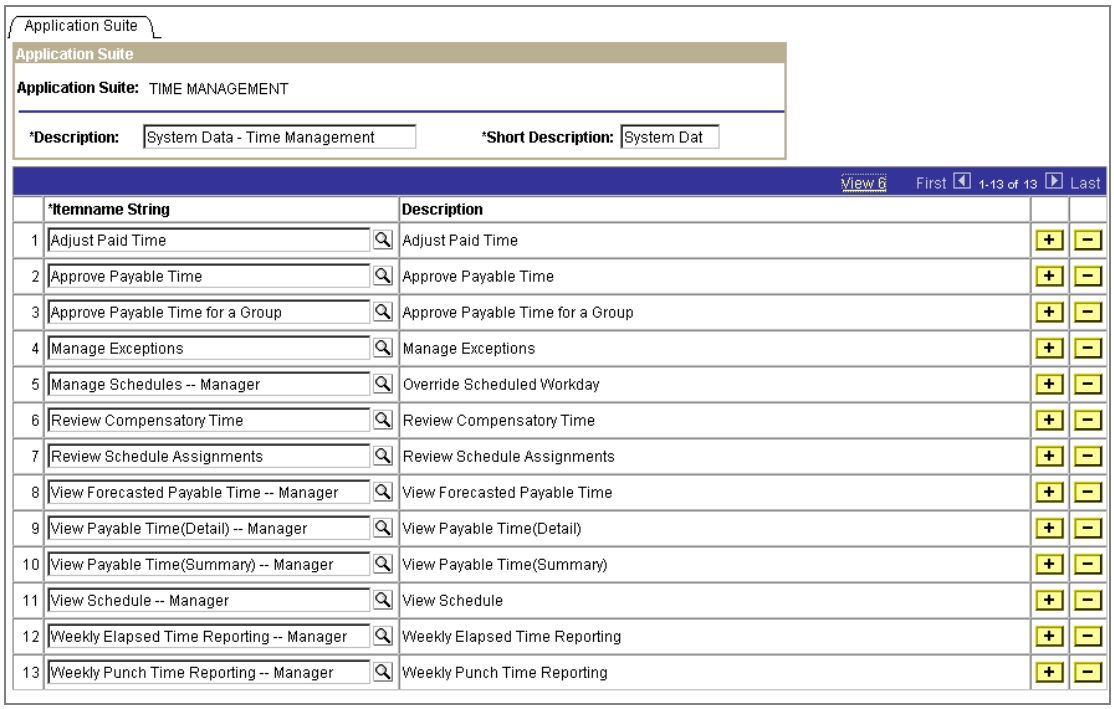
Access the Application Suite page.

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 the Go field on the Time and Labor Launch Pad page for managers. Likewise, the Time Reporting Application Suite is used to set up the Go field on the Time and Labor Launch Pad page for employees. Both suites are delivered with the system. For each one you set up, specify which application items the users (managers or employees) can access via the Go field in the Time and Labor Launch Pad page.

Note. Only the items for which the user has Permission List access are available in the Go drop-down list box. 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 box.

Application Items for Managers

The following 13 application items are available to managers through the Time Management application suite:



Application Suite page: List of all application items available to Managers

Itemname String Use to 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.

Adjust Paid Time Select to make record-only adjustments to time that has already been paid or closed. The changes that you make aren't processed through payroll again. This feature is used to update the PeopleSoft Time and Labor system; the information does not get passed on to payroll.

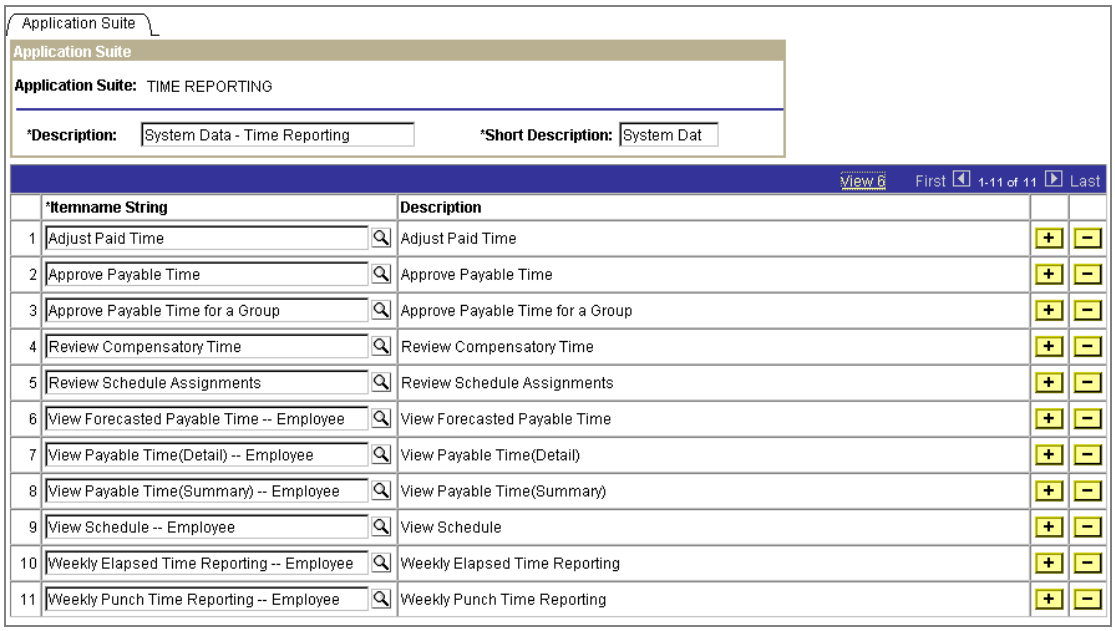
For example, you may mistakenly report eight hours of regular time for an employee, but later you realize that it should have been eight hours of vacation time. It was fixed in PeopleSoft Payroll, but now you need to fix it in Time and Labor. In this scenario, you do not want the hours to get processed 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.

Approve Payable Time Select to approve the employee's time for payroll.

Approve Payable Time for a Group	Select to approve time for payroll for a group of employees.
Manage Exceptions	Select to view and allow exceptions.
Manage Schedules – Manager	Select to override an employee's schedule.
Review Compensatory Time	Select to view an employee's compensatory time.
Review Scheduled Assignments	Select to review an employee's scheduled assignments.
View Forecasted Payable Time – Manager	Select to view an employee's forecasted payable time.
View Payable Time (Detail) – Manager	Select to view an employee's payable time details.
View Payable Time (Summary) – Manager	Select to view a summary of the employee's payable time.
View Schedule – Manager	Select to view the employee's weekly schedule.
Weekly Elapsed Time Reporting – Manager	Select to view, report, or change the employee's reported weekly elapsed time.
Weekly Punch Time Reporting – Manager	Select to view, report, or change the employee's weekly elapsed time.
Save	Select application items for an Application Suite and click the **Save** button to make the application items appear in the Go function's drop-down list box in the Time and Labor Launch Pad page.

Application Items for Time Reporters

The following 11 application items are available to time reporters through the Time Reporting application suite:



Application Suite page: List of all application items available to the Time Reporter

Itemname String Use to 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.

Adjust Paid Time Select to make record-only adjustments to time that has already been paid or closed. The changes that you make aren't processed through payroll again. This feature is used to update the PeopleSoft Time and Labor system; the information does not get passed on to payroll.

Approve Payable Time Select to approve the employee's time for payroll.

Approve Payable Time for a Group Select to approve time for payroll for a group of employees.

Manage Exceptions Select to view and allow exceptions.

Manage Schedules – Manager Select to override an employee's schedule.

Review Compensatory Time Select to view an employee's compensatory time.

Review Schedule Assignments	Select to review an employee's scheduled assignments.
View Forecasted Payable Time – Employee	Select to view an employee's forecasted payable time.
View Payable Time (Detail) – Employee	Select to view an employee's payable time details.
View Payable Time (Summary) – Employee	Select to view a summary of the employee's payable time.
View Schedule – Employee	Select to view the employee's weekly schedule.
Weekly Elapsed Time Reporting – Employee	Select to view, report, or change the employee's reported weekly elapsed time.
Weekly Punch Time Reporting – Employee	Select to view, report, or change the employee's weekly elapsed time.
Save	Select application items for an Application Suite and click the **Save** button to make the application items appear in the Go function's drop-down list box in the Time and Labor Launch Pad page.

See Also

"Managing Time", Adjusting Time

"Managing Time", Approving Time

"Managing Time", Managing Exceptions

Overriding an Employee's Schedule

Viewing Compensatory Time and Expiration

"Setting Up Time Reporters", Assigning Schedules

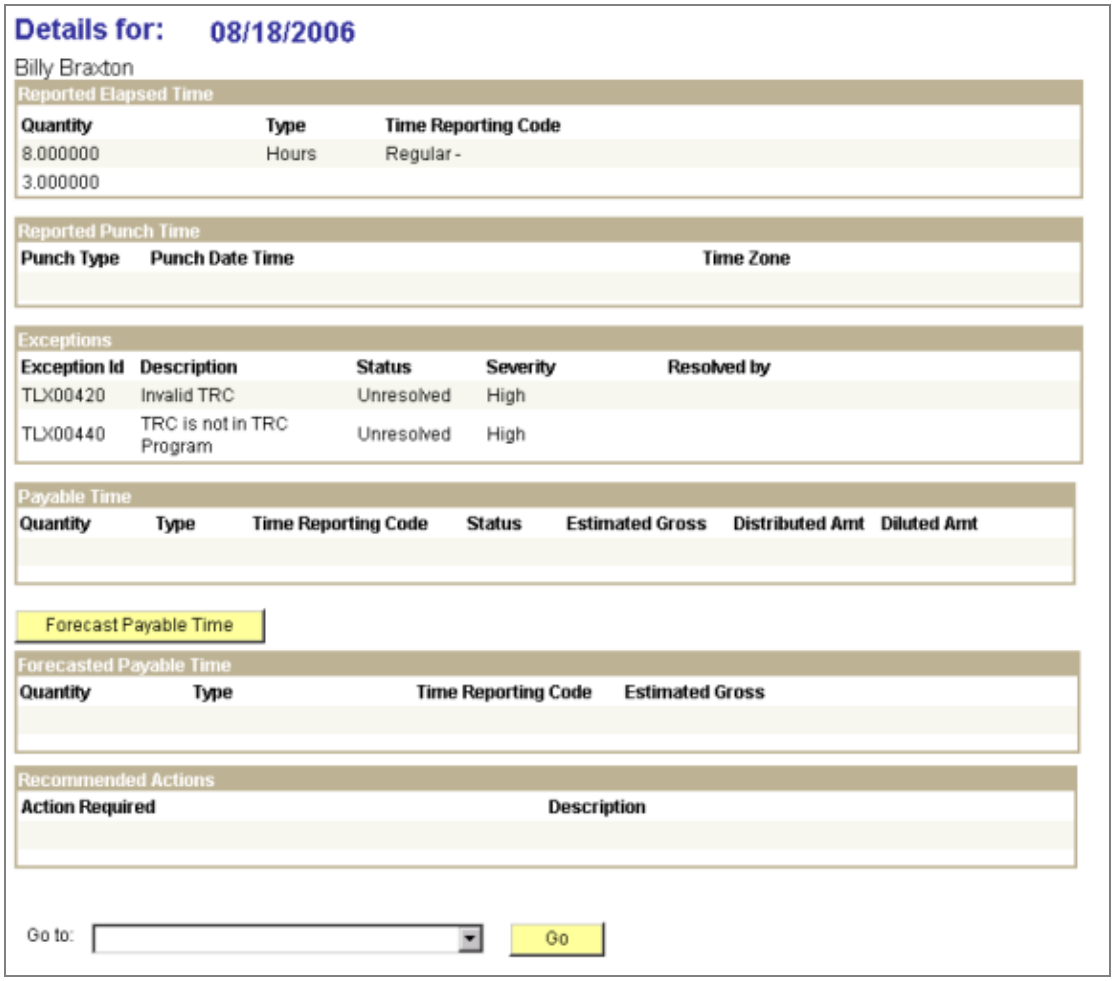
Viewing Forecasted Payable Time

Viewing an Employee's Work Schedule

Entering, Viewing, and Changing Elapsed Time

Viewing Detailed Calendar Information

Access the Details page.



Details page

The Details page displays information that exists for that day. It shows elapsed hours, punch hours, exceptions with associated recommended actions, payable time, and forecasted payable time, if they exist. The values *X, P, E, $, F,* or *R* that are on the Time and Labor Launch Pad page indicate 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. 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.

Managing Employees' Schedules

In this section, we discuss managing employees' schedules and how to:

- View an employee's work schedule.
- View detailed information on a shift.
- View holidays for the employee.
- Override an employee's schedule.
- View schedules.

See Also

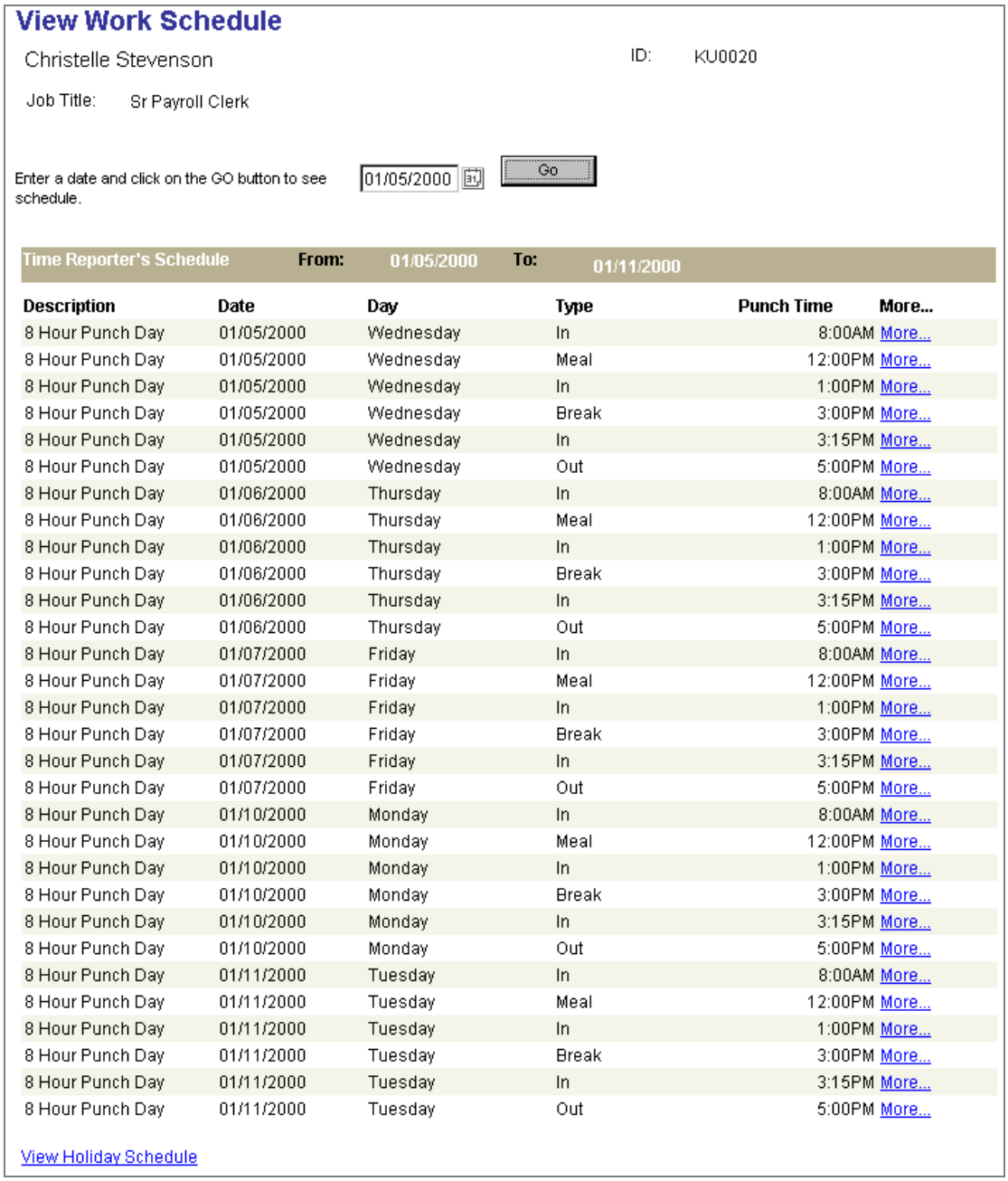
"Defining Work Schedules"

Pages Used to Manage Employees' Schedules

Page Name	*Object Name*	*Navigation*	*Usage*
View Work Schedule	SCH_VIEW_SCH_PNL	• For manager access: Self Service, Manager, View, Work Schedule • For employee access: Self Service, Employee, View, Work Schedules	View an employee's schedule at the day level.
Shift Details	SCH_VIEW_SEC_PNL1	Click More… on the View Work Schedule Page.	View detailed information on a shift.
Holiday Schedule	SCH_HOLDAY_SCH_SEC	Click the View Holiday Schedule on the View Work Schedule Page.	View holidays for the employee.
Override Workday	SCH_MNG_SCH_PNL	For manager access: Self Service, Manager, Tasks, Override Scheduled Workday	Override an employee's schedule for a single workday. This page is for managers only.
View Schedules	SCH_VIEW_SCH_PNL1	Click View Schedules on the Override Scheduled Workday Page.	View schedules.

Viewing an Employee's Work Schedule

Access the View Work Schedule page.



View Work Schedule

Christelle Stevenson ID: KU0020

Job Title: Sr Payroll Clerk

Enter a date and click on the GO button to see schedule. 01/05/2000 Go

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

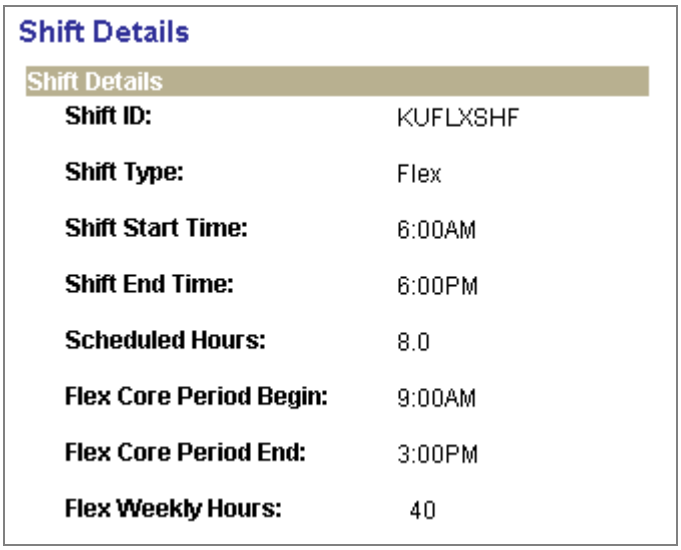
View Work Schedule page

Go 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.

More…	Appears when you select an employee who has a punch or flex schedule. Click **More…** if you want to see the Shift Details Page.
View Holiday Schedule	Click to see the Holiday Schedule Page.

Viewing Detailed information on a Shift

Access the Shift Details page.

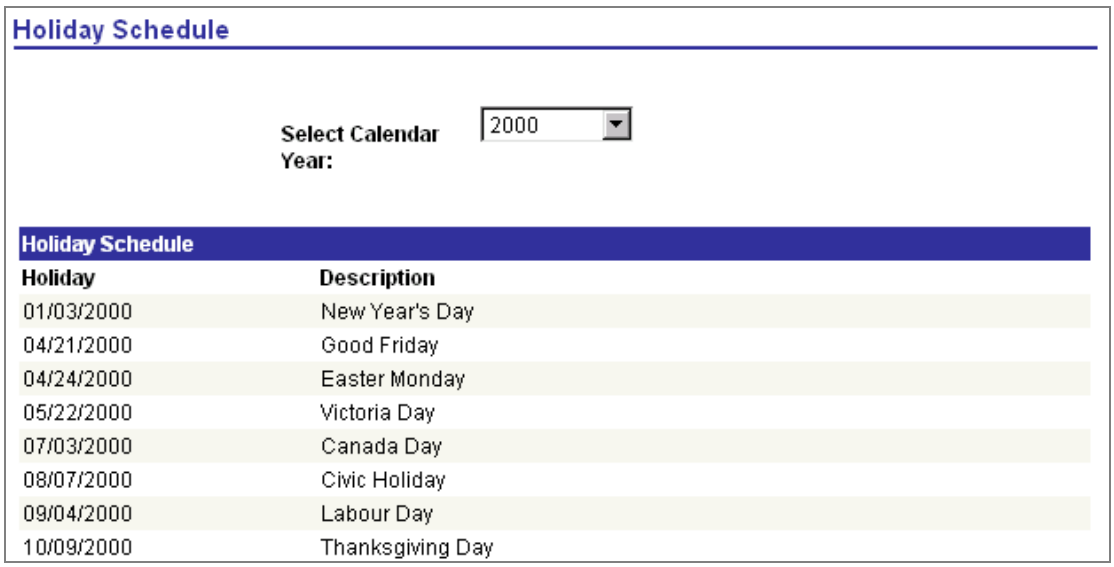


Shift Details page

Return	Click this button to return to the View Work Schedule Page.

View Holidays for the Employee

Access the Holiday Schedule page.



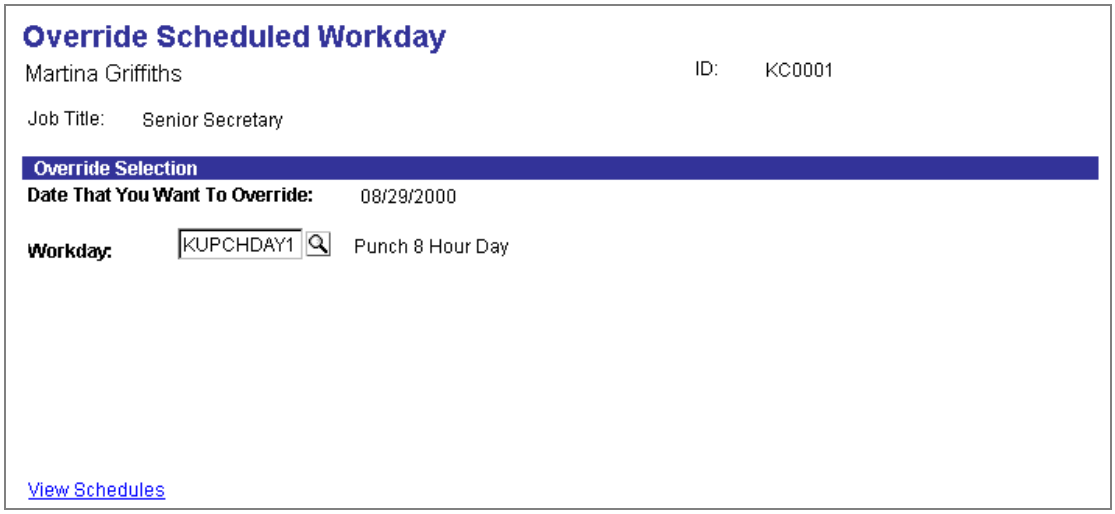
Holiday Schedule page

Select the calendar year for which you want to view the holiday schedule. The system displays dates and descriptions of the holidays that are defined on the Holiday Schedule Table Page that are associated with the employee.

Note. The Holiday Schedule page is for your reference. The system does not include these holidays in employee's schedules.

Overriding an Employee's Schedule

Access the Override Workday page.



Override Workday page

Note. 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.

Date That You Want To Override	This field displays the date that you entered to access the page. This is the date that you want to override in the schedule.
Workday	Enter the new workday that should replace the originally scheduled workday; this is the day that you want the employee to work. The system displays a description of the workday that you have selected.
View Schedules	Click 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.

Note. 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.

Note. 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.

  If you want an employee to work a split shift, 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 that 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

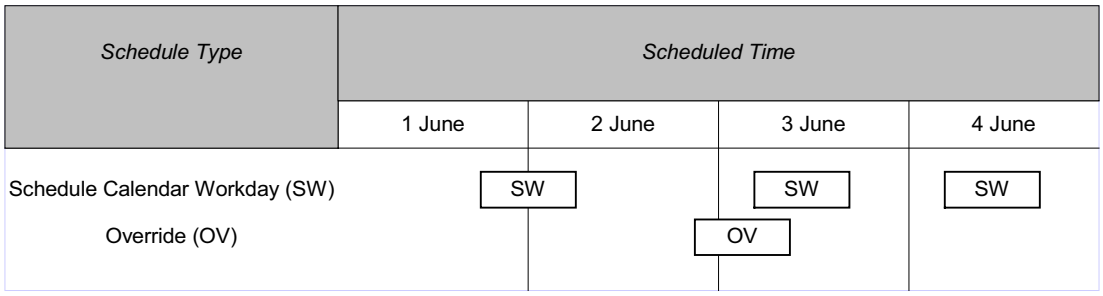
3 June: 6:00-15:00

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

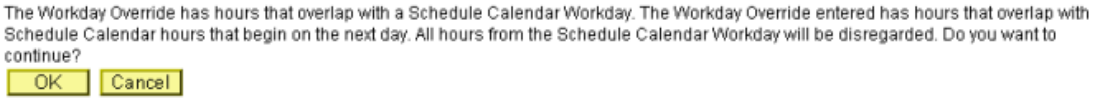
This workday override conflicts with the Schedule Calendar workday 3 June. The workday override ends at 8:00, however, the Schedule Calendar workday is supposed to begin at 6:00 on the same day.



Override overlaps with hours in a Schedule Calendar workday that begins the next day

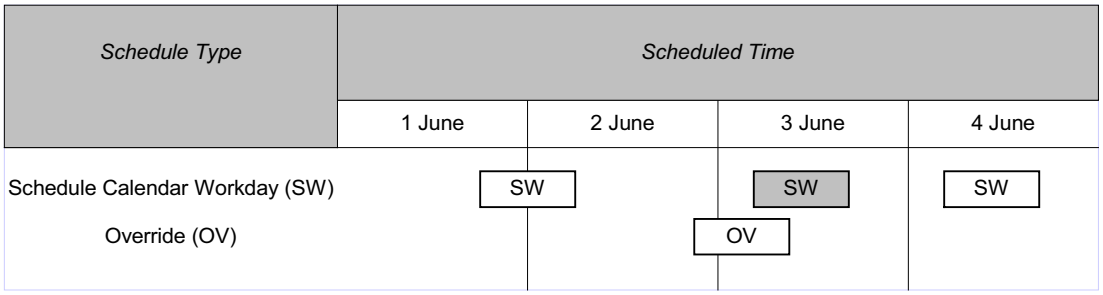
System's Resolution for Scenario 1, Example A:

Because the workday override has hours that overlap with Schedule Calendar workday hours that begin on the next day, the following warning will appear:



Next Day Warning

If the manager selects **OK**, then Schedule Resolve will present the scheduled override *and* disregard all 3 of June's Schedule Calendar workday hours.



Resolution to Scenario 1, Example A

Note. White boxes indicate schedules 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

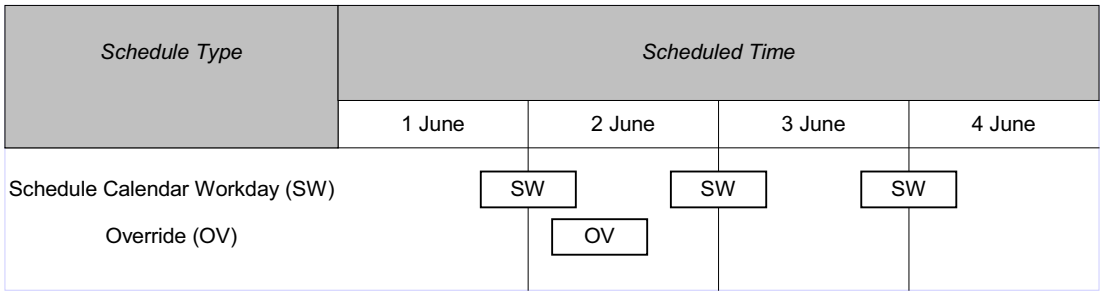
2 June: 23:00-8:00

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

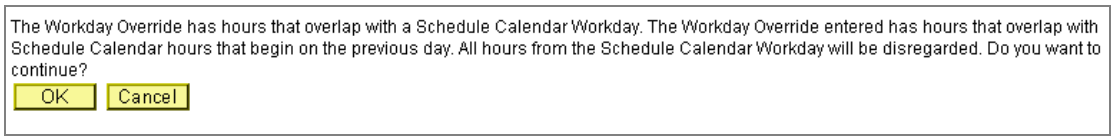
This workday override conflicts with the Schedule Calendar workday 1 June. The workday override begins at 6:00, however, the Schedule Calendar workday is supposed to end at 8:00 on the same day.



Override overlaps with hours in a Schedule Calendar workday that begins the previous day

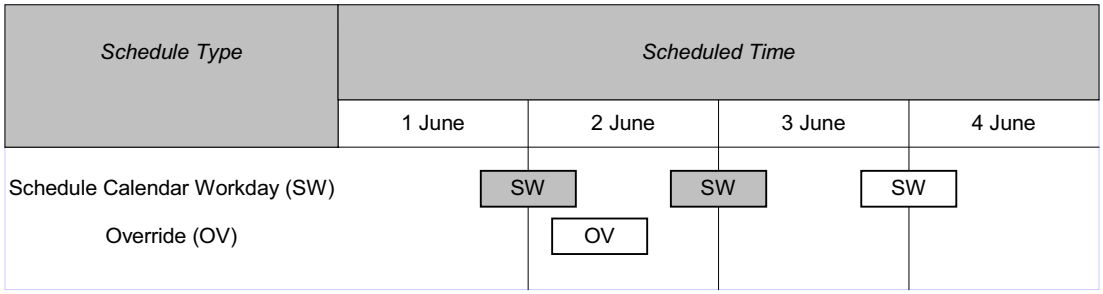
System's Resolution for Scenario 1, Example B:

Because the workday override has hours that overlap with Schedule Calendar workday hours that begin on the previous day, the following warning will appear:



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.



Resolution to Scenario 1, Example B

Note. White boxes indicate schedules 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 are as follows:

1 June: 17:00-23:00

2 June: 17:00-23:00

3 June: 17:00-23:00

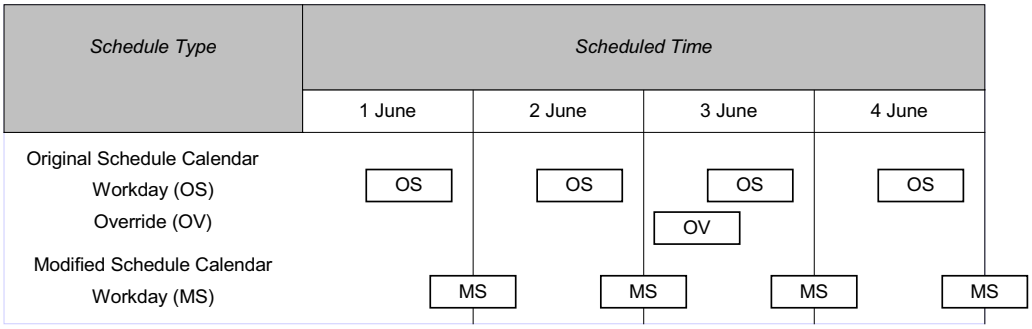
4 June: 17:00-23:00

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 now changes. The shift used in the Schedule Calendar is 22:00-7:00 instead of 17:00-23:00.

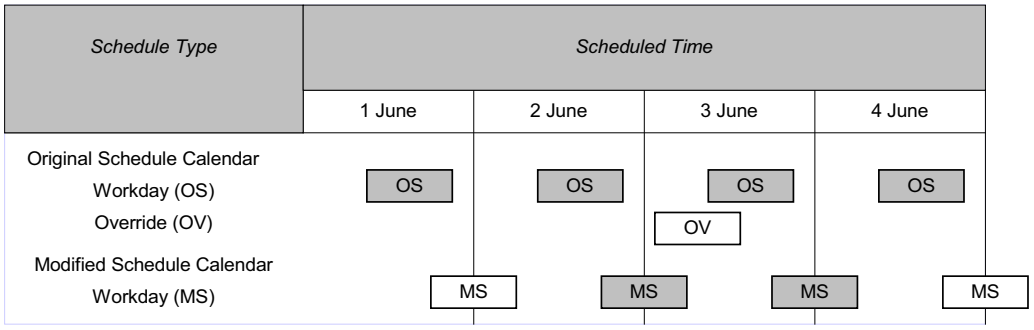
When changes are made to the Schedule Calendar, all original Schedule Calendar workday information is disregarded and the modified Schedule Calendar workday information is presented. The workday override overlaps with the modified Schedule Calendar workday 2 June.



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.



Resolution to Scenario 2, Example C

Note. White boxes indicate schedules that will be presented. Grey boxes indicate schedules that will be disregarded.

Scenario 2, Example D:

Employee D's Schedule Calendar workdays are as follows:

1 June: 14:00-23:00

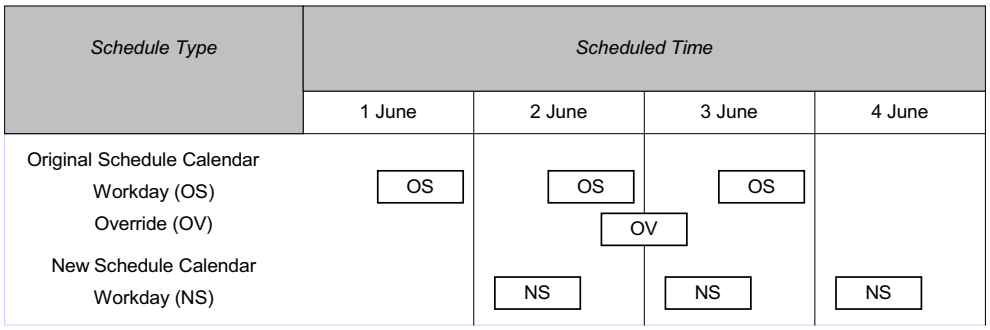
2 June: 14:00-23:00

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

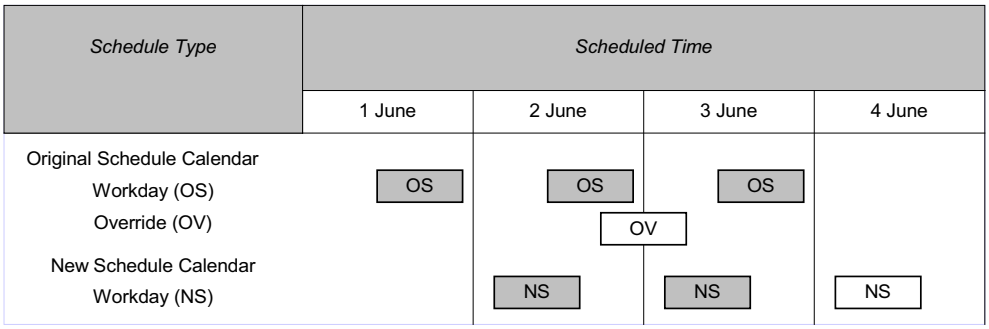
After the override is entered, the manager changes the employee's schedule assignment so that the employee's shift is from 6:00-14:00 instead of 17:00-23:00.



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.



Resolution to Scenario 2, Example D

Note. White boxes indicate schedules 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 are as follows:

1 June: 17:00-23:00

2 June: 17:00-23:00

3 June: 17:00-23:00

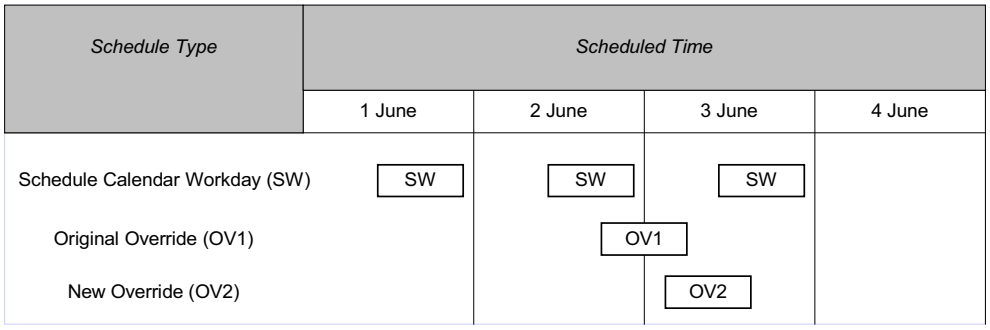
The manager makes an online workday override. The manager makes the following workday override:

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

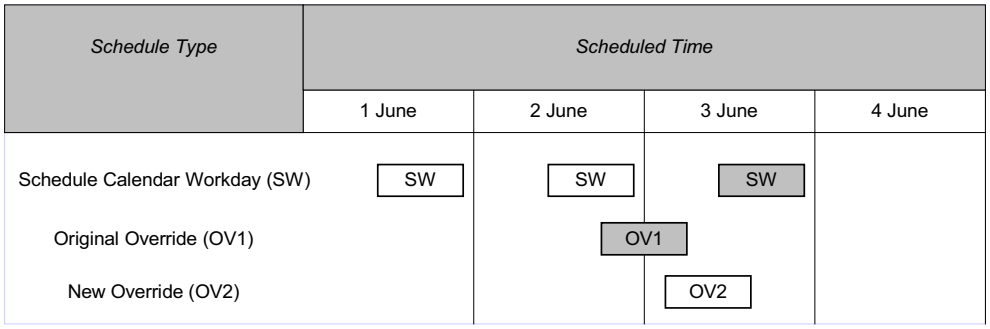
The second workday override has hours that overlap with hours from the first workday override that begins the day before.



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 uses the most recent override and disregards the previous overrides. 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. Schedule Resolve will also present the new workday override.



Resolution to Scenario 3, Example E

Note. White boxes indicate schedules that will be presented. Grey boxes indicate schedules that will be disregarded.

Scenario 3, Example F:

Employee H's Schedule Calendar workdays are as follows:

1 June: 14:00-23:00

2 June: 14:00-23:00

3 June: 14:00-23:00

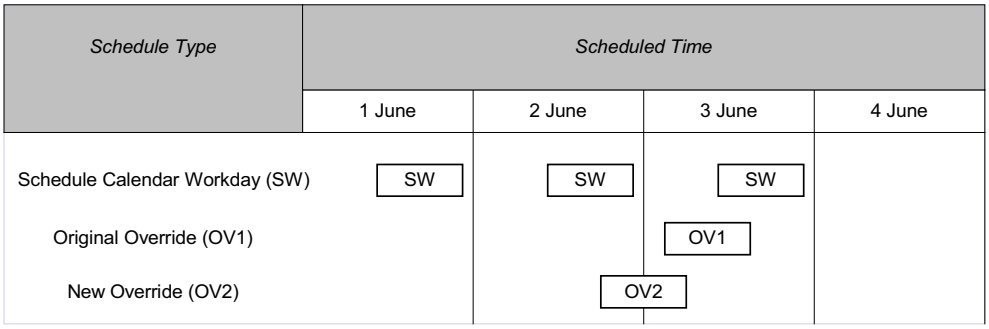
The manager makes an online workday override. The manager makes the following workday override:

3 June: 6:00-15:00

However, the manager decides to make an additional override. The manager makes the following new workday override:

2 June: 22:00-7:00

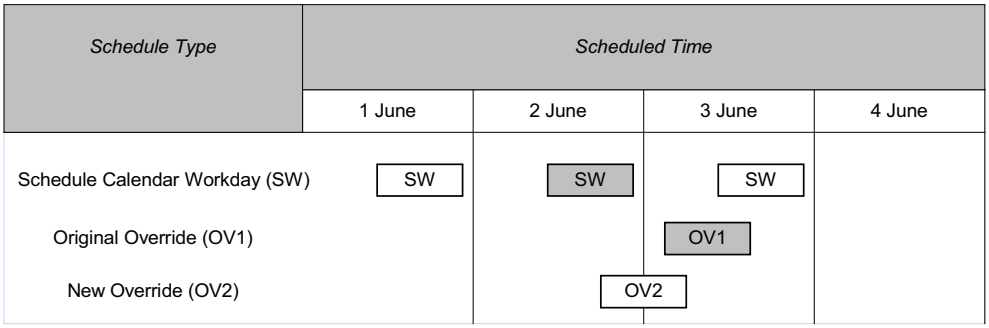
The second workday override has hours that overlap with hours from the first workday override that begins the next day.



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 uses the most recent override and disregards the previous overrides. Thus, Schedule Resolve disregards the original override and presents the new override. There is no longer a conflict with Schedule Calendar workday 3 June. Hence, Schedule Calendar workday 3 June is no longer disregarded.

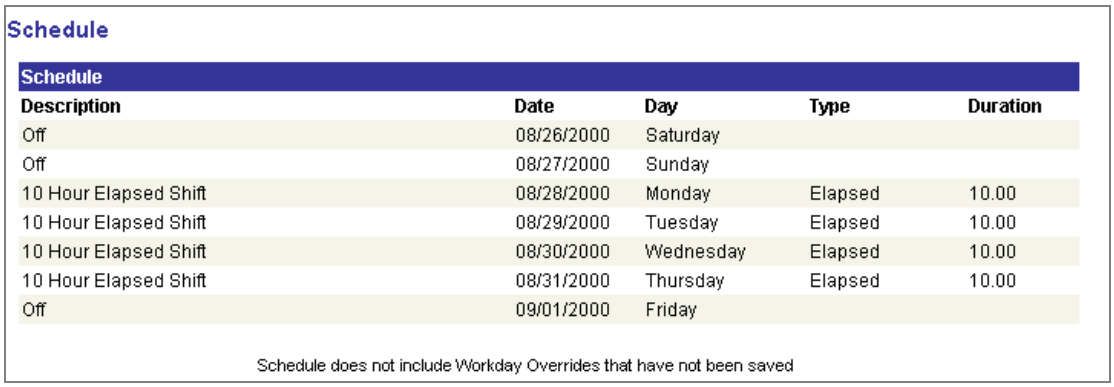


Resolution to Scenario 3, Example F

Note. White boxes indicate schedules that will be presented. Grey boxes indicate schedules that will be disregarded.

Viewing Schedules

Access the View Schedules page.


Schedule

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

Description, Date, Day, and **Type** 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.

Reporting Time

In this section, we discuss reporting time and how to:

- Enter, view, and change employees' weekly punch time.
- Enter additional information about a punch time.
- Enter, view, and change elapsed time.
- Enter additional information about elapsed punch time.
- Use mass time reporting.
- Select employees for mass time reporting.
- Specify dates and method for mass time reporting.
- View compensatory time and expiration.

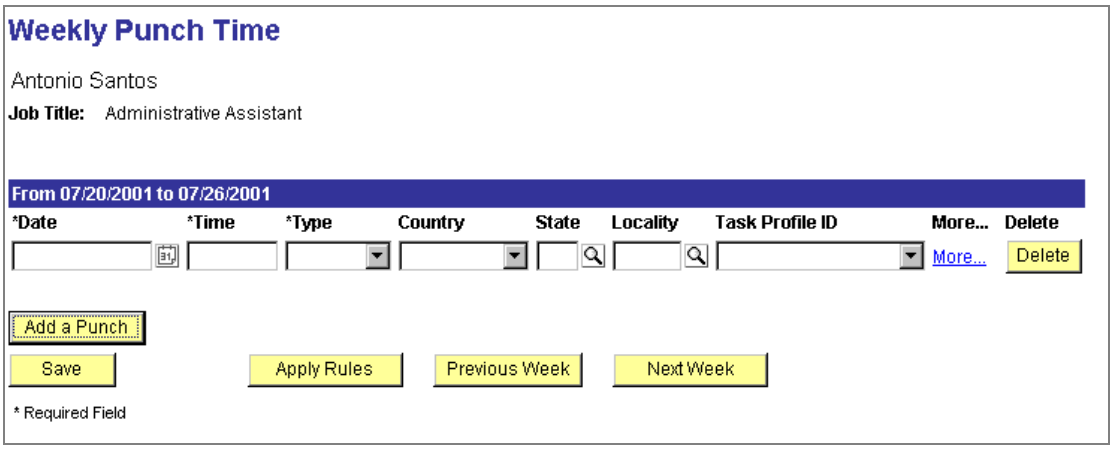
Pages Used in Reporting Time

Page Name	*Object Name*	*Navigation*	*Usage*
Weekly Punch Time	TL_TR_PUNCH_ADM	• For manager access: Self Service, Manage, Tasks, Weekly Punch Time • For employee access: Self Service, Employee, Tasks, Weekly Punch Time	Enter, view or change weekly punch time for employees.
Weekly Punch Time Detail	TL_TR_PUNCH_S1	Click the More on the Weekly Punch Time Page.	Enter additional information about a punch time.
Weekly Elapsed Time Reporting	TL_TR_WEEKLY	• For manager access: Self Service, Manage, Tasks, Weekly Elapsed Time • For employee access: Self Service, Manage, Tasks, Weekly Elapsed Time	Enter, view, or change elapsed time for the employee.
Weekly Elapsed Time Detail	TL_TR_WEEKLY_S1	Click More on the Weekly Elapsed Time Page.	Enter additional information about elapsed punch time.
Mass Time Reporting - Select Group	TL_MASS_WHO	For manager access: Self Service, Manage, Tasks, Mass Time Reporting	Select employees for mass time reporting.

Page Name	Object Name	Navigation	Usage
Mass Time Reporting	TL_MASS_TIME_SELF, TL_MASS_TIME_MSS, TL_MASS_SELF_SAVE, TL_MASS_MORE_SEC	• 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 • Click the Next button on the Mass Time Reporting Page (page 1 of 2). • Click More on the Mass Time Reporting Page (page 2b of 2).	Specify the range of dates and the method for reporting time. Indicate additional attributes about the time that you are reporting. Report additional Time Reporting Elements and Task Elements.
Review Compensatory Time	TL_COMPTIME_PNL	• For manager access: Self Service, Manage, View, Compensatory Time Balance • For employee access: Self Service, Manage, View, Compensatory Time Balance	View compensatory time balance and expiration information for employees.

Entering, Viewing, or Changing Employees' Weekly Punch Time

Access Weekly Punch Time page.



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.

Add a Punch Click to add additional time punches.

Delete Click to delete a row of punch time.

More Click to report additional time reporting or task element information. The system opens the Weekly Punch Time Detail page.

Save Click this button after you enter or change punch time information to save the information and submit the time for processing.

During this phase, the system validates the data that you entered and records any invalid entries into an exceptions table that the manager can review on the Managing Exceptions page.

Apply Rules This button appears only if the Run On-line Rules feature is activated on the TL Installation page. Click the button to save your data and launch the Apply Online Rules process, which immediately applies the online rules for the time reporter to the time you entered on this page.

If any exceptions are generated, the Manage Exceptions page automatically appears after the process is finished.

If no exceptions occur and payable time is created, the View Payable Time Summary page appears with the rows of estimated time that were created from the online rules.

Previous Week Displays the data entry page for the previous week.

Next Week Displays the data entry page for the next week.

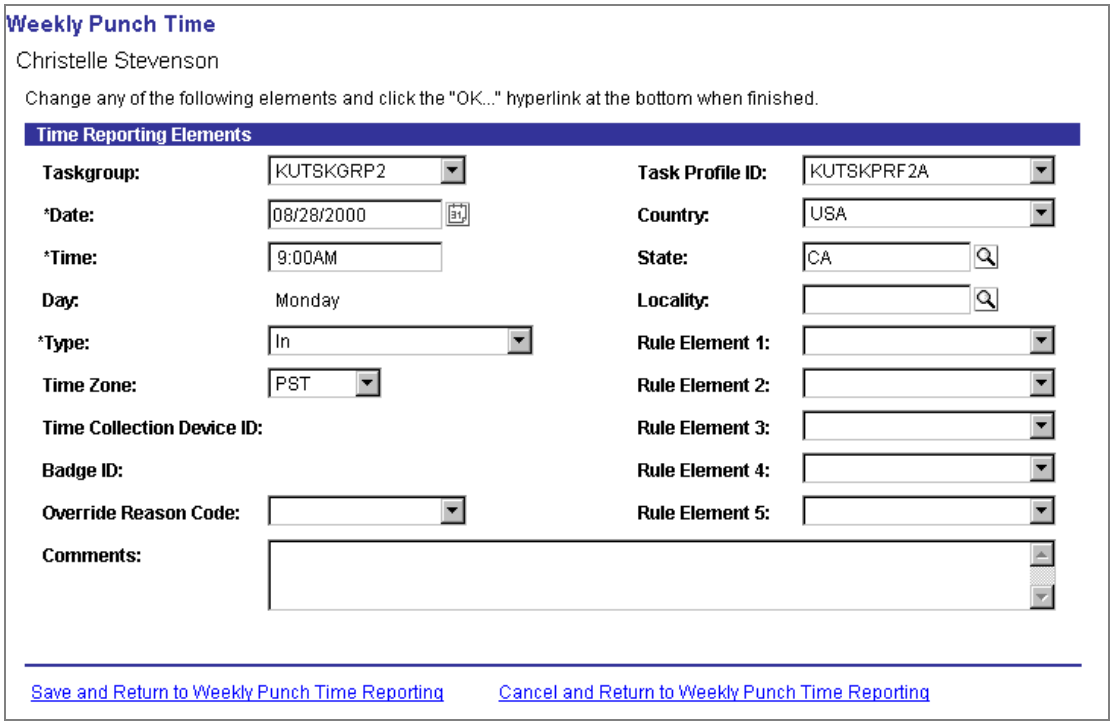
See Also

”Reporting Time”, Creating Time Reporting Templates

“Creating Rules in Time Administration,” The Online Processing Component

Entering Additional Information About Punch Time

Access the Weekly Punch Time Detail page.



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, suppose 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.

Note. If you clear the Edit Prior Period Time check box on the Row Security Permission List page and try to enter time 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, suppose 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 mid-period adjustment has occurred and the page cannot be saved.

If you select the Edit Prior Period Time check box on the Row Security Permission List page, you may use the Days Grace Allowed feature. By using this feature, you may limit the period of time during which users can enter prior period adjustments.

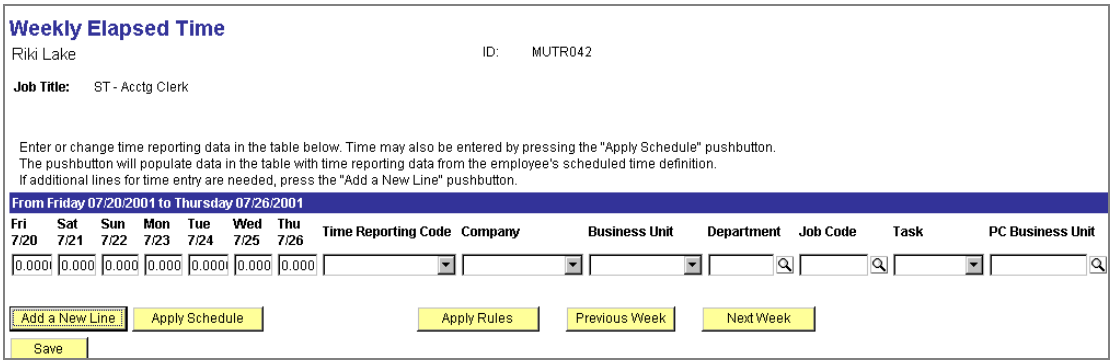
See Also

"Understanding Batch Processing in Time Administration", Step 2 - Combining Time Reporters Into Batches

"Reporting Time", Creating Time Reporting Templates

Entering, Viewing, and Changing Elapsed Time

Access the Weekly Elapsed Time Reporting page.



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 system only 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 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.

Add a New Line

Click this button to add a row to report additional time.

If you want to delete a row of reported time, click the **Delete** button at the end of the row. 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.

Apply Schedule

Click this button 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.

Apply Rules

Click to save your data and launch the Apply Online Rules process, which immediately applies the online rules for the time reporter to the time you entered on this page. This button appears only if the Run On-line Rules feature is activated on the TL Installation page.

If any exceptions are generated, the Manage Exceptions page automatically appears after the process is finished.

If no exceptions occur and payable time is created, the View Payable Time Summary page appears with the rows of estimated time that were created from the online rules.

Previous Week

Displays the data entry page for the previous week.

Next Week

Displays the data entry page for the next week.

Save

After you enter time, save the page. The time is now submitted for processing. During this phase, the system validates the data that you've entered and records any invalid entries into an exception table that a manager can review on the Manage Exceptions pages.

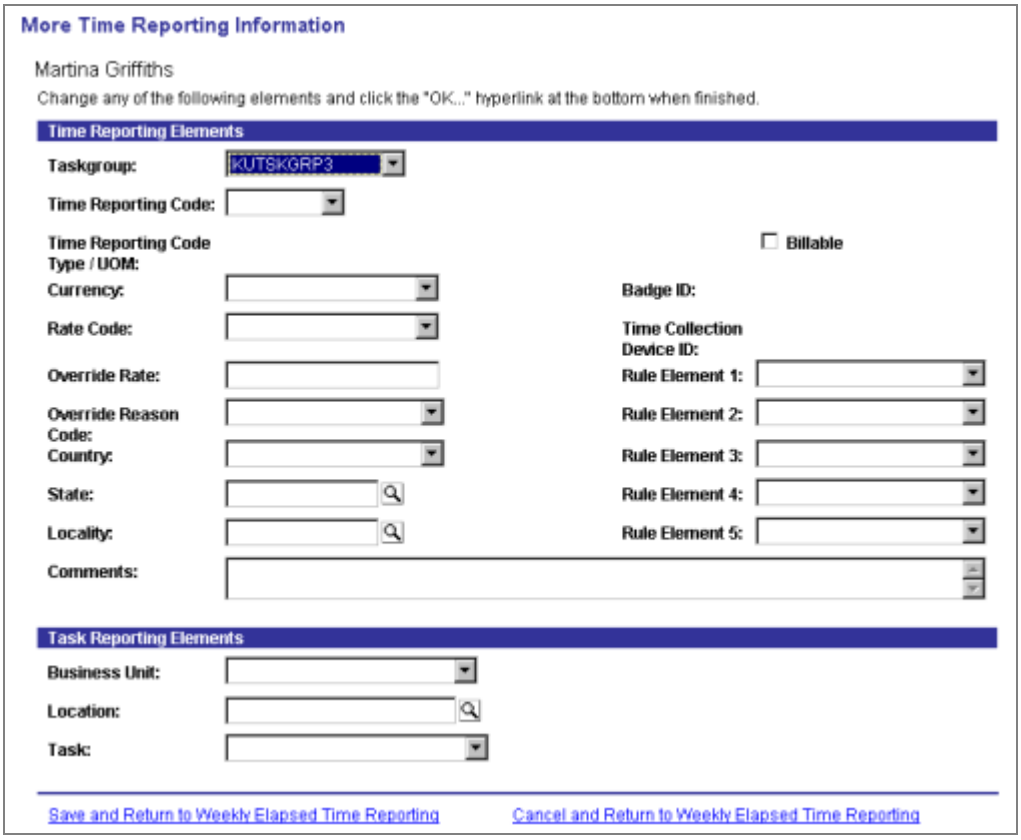
More Click to access the Weekly Elapsed Time Detail page, where you can report additional time reporting or task element information.

See Also

"Creating Rules in Time Administration," The Online Processing Component

Entering Additional Information About Elapsed Time

Access the Weekly Elapsed Time Detail page.



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 on 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.

Note. If you have the Edit Prior Period Time check box 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, suppose 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. Open up a new session starting on 5 August 2000, in order to report time for 5 August 2000 and beyond.

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, suppose the Days Grace Allowed field is set to 7 days, you 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 opens up with all the fields in the grid in display-only mode.

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 is manually entered by the time reporter or automatically entered by the system during time reporting.

Currency Select a currency code for the time that 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 that 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 that you want to adjust. Otherwise, the system uses the default value for the time reporter.

State Select the state for the time that 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 that 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, Customer, Task, Perf Meas Business Unit (Performance Measurement Business Unit)**, Activity ID, Business Unit,** and **Department**	Select values in these fields for the time that you want to adjust. These elements appear if these task elements are defined on the task group associated with the employee.
Job Code and **Position**	Select a job code and position. These elements appear if this task element is defined on the task group associated to the time reporter.
Billable	Select if you want the time to be marked as billable for PeopleSoft Projects.

See Also

”Understanding Batch Processing in Time Administration”, Step 2 - Combining Time Reporters Into Batches

”Reporting Time”, Creating Time Reporting Templates

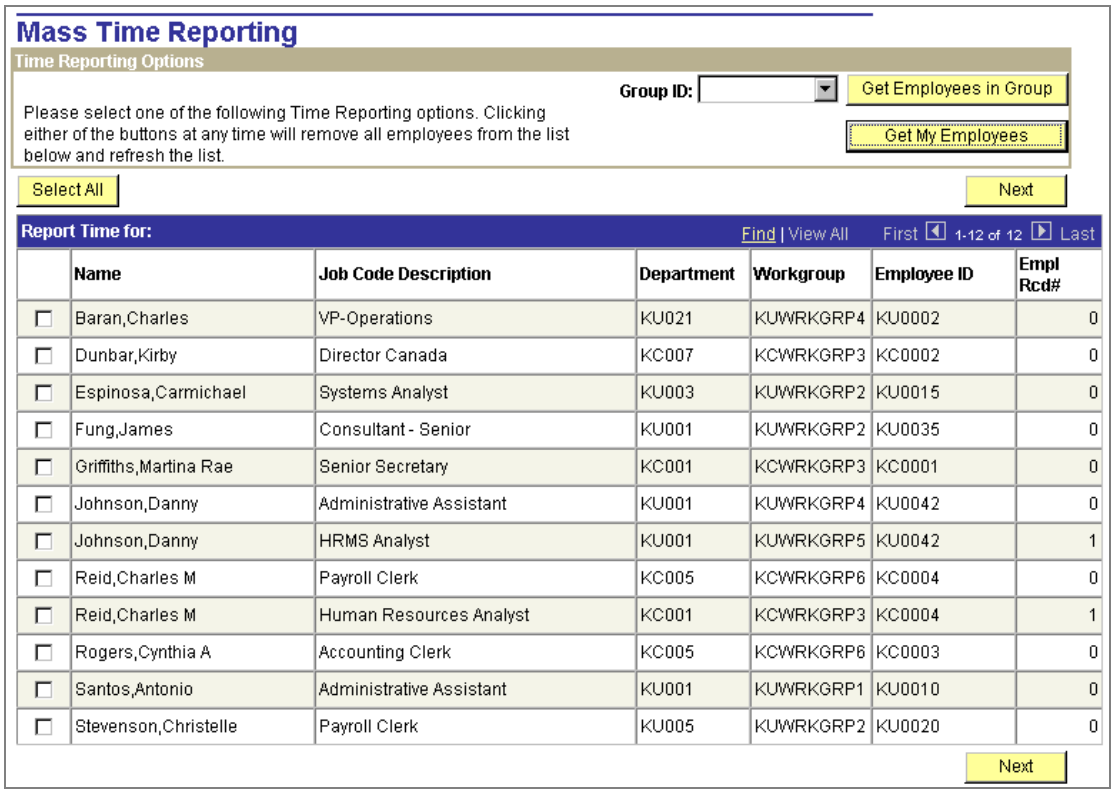
Using Mass Time Reporting

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.

Selecting Employees for Mass Time Reporting

Access the Mass Time Reporting - Select Group page.



Mass Time Reporting - Select Group page

Managers can use this page to report time for employees whether they report directly to them or not. 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, suppose that 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.

Get Employees in Group 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.

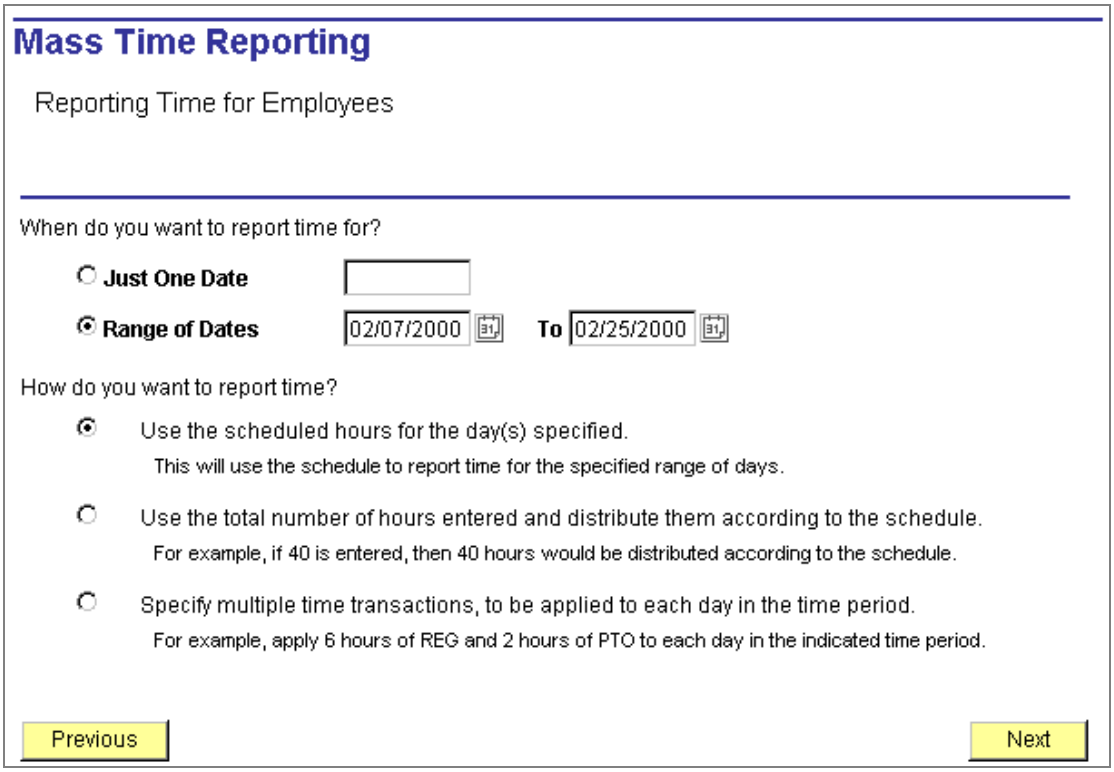
Get My Employees If, instead of a group, you want to select the employees that report directly to you, click the **Get My Employees** button. The system displays a list of all the employees that report directly to you. The system determines this information based on the time manager's row security class and a view called PS_TL_ADM_SRCH_VW.

Select All Select the employees for whom you want to report time by selecting the check box beside their names once the list appears. You can also click the **Select All** button to indicate that you want to report time for all of the employees on the list.

Next Click this button to go to the next segment of the page, the Mass Time Reporting Page (page 1 of 2) when you have finished selecting your employees.

Specifying Dates and Method for Reporting Mass Time Reporting

Access the Mass Time Reporting page.



Mass Time Reporting page (page 1 of 2)

Just One Date To report time for just one day, select and fill in the date.

Range of Dates To report time for a range of dates, select 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 your schedule lists for the dates that you specified. For example, suppose that you want to report taking vacation for two weeks, 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 employees must be assigned to a schedule in order for reported time to be generated using this option.

Note. 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, suppose that 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 distributes 80 hours of REG over the two weeks according to how your schedule is set up.

   Note. The employee must be assigned to a schedule to use this feature. Also, the system doesn't distribute the total number of hours 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 are applied to the last day.

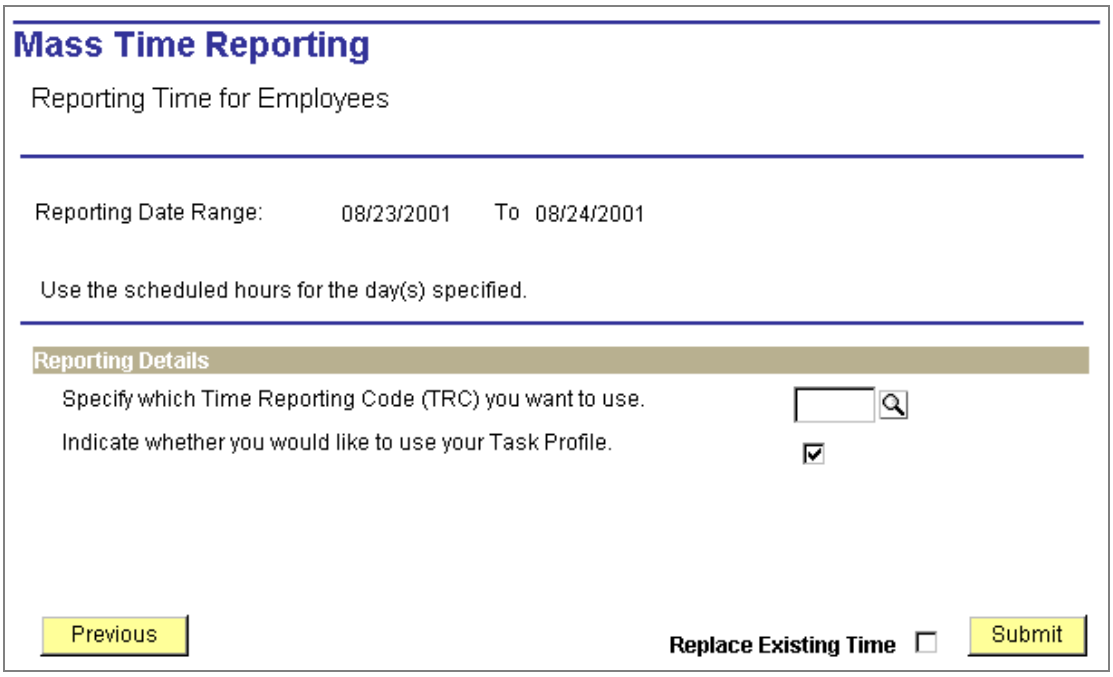
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3. Specify multiple time transactions to be applied to each day in the time period.

   Use this option to report time and specify multiple transactions for the system to apply to the specified date or date range. For example, suppose 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, 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 that you specified. You do not need to be assigned to a schedule in order to report time using this option.

   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, suppose that 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.

   The next page opens up after selecting one of the first two options on the Mass Time Reporting page (page 1 of 2) and clicking on the **Next** button.



Mass Time Reporting page (page 2a of 2)

Specify which Time Reporting Code (TRC) you want to use

Specify a time reporting code in this 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. 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're reporting a lump sum of time to be distributed according to your schedule, enter the total number of hours that you want distributed in the **Specify how much you want to report** box.

Indicate whether you would like to use your Task Profile

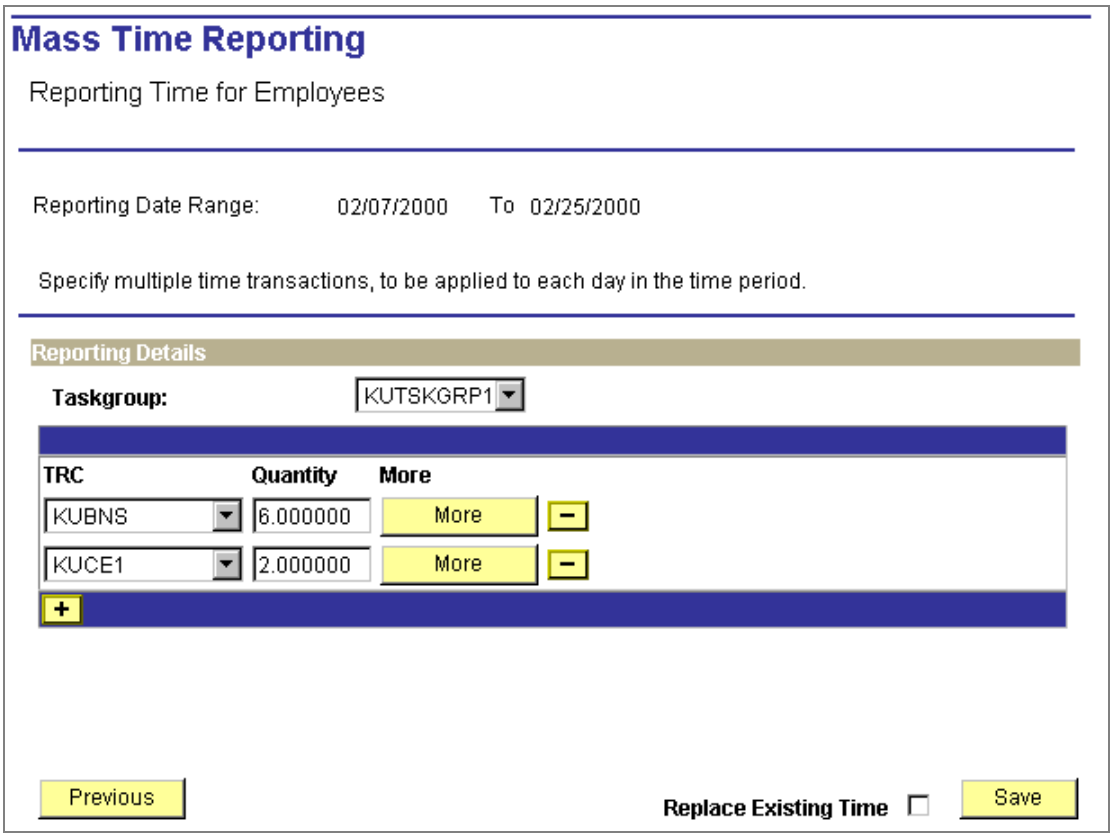
Select to apply the task profile information, that is assigned on your Time and Labor Employee Data record, to this instance of reported time.

Replace Existing Time

Select to overwrite any existing data for the dates that 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 code (RT_SOURCE) equal to "SYS."

	The system will replace all elapsed and punch time for an employee on the specified dates that originated from either the Mass Time Reporting or Rapid Entry pages. If you do not select this check box, the system adds the time in this entry to any previous data. For example, suppose that 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.
Submit	Click 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.

Note. 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.



Mass Time Reporting Page (page 2b of 2)

Taskgroup (Optional) If this 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 for which you are reporting.

If a different Taskgroup is selected other than the default, this will be considered Taskgroup borrowing. When the time is submitted, it uses the task reporting elements associated with that borrowed Taskgroup. If selecting a Taskgroup, this drives the fields shown after clicking the **More** button.

TRC

Specify all the transactions that the system is to report for each of the days in the specified date range. Select a time reporting code in the Specify which Time Reporting Code (TRC) that 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. 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 the time is submitted.

Quantity

Enter the number of hours.

Add

Click this button to add additional transactions.

Replace Existing Time

Select this check box if you want to overwrite any existing data for the dates that you specified. This will replace any time generated through Rapid Time Entry or Mass Time Entry, or that has a reported time source code (RT_SOURCE) equal to "SYS." The system replaces all elapsed and punch time for an employee on the specified dates that originated from either the Mass Time Reporting or Rapid Entry pages. If you do not select this check box, the system adds the time in this entry to any previous data.

For example, suppose that 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.

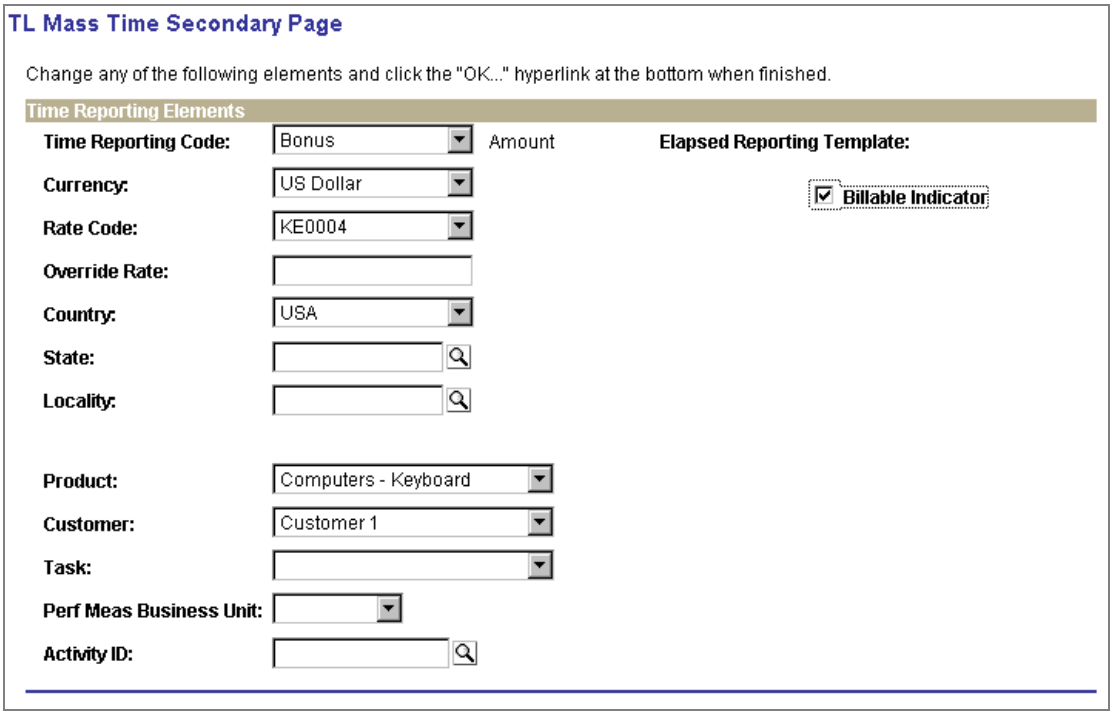
Save

Click this 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 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 creates payable time.

More

Click this button to access the Mass Time Detail Page, where you can report additional time reporting elements.

Note. 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.



Mass Time Detail page

See Also

Entering Additional Information About Elapsed Time

"Reporting Time", Creating Time Reporting Templates

Viewing Compensatory Time and Expiration

Access the Review Compensatory Time page.



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.

Show Time Expiring in Select how far out you want to view compensatory time expiration information. Once you make a selection, the system displays all compensatory time that has an expiration date and that meets those criteria.

For example, suppose that 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.

Expiration Date 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.

Number of Hours Expiring Displays the number of compensatory hours that were originally reported and are set to expire on the date specified in the **Expiration Date** field.

Balance at End of Day Displays the compensatory time balance at the end of the date specified in the **Expiration Date** field once the hours have expired.

Managing Time

In this section, we discuss managing time and how to:

- View a summary of payable time.
- View details of payable time.
- Display time and task reporting details for payable time.
- View forecasted payable time.
- Display time for 30 days.
- Display time and task reporting details for forecasted payable time.

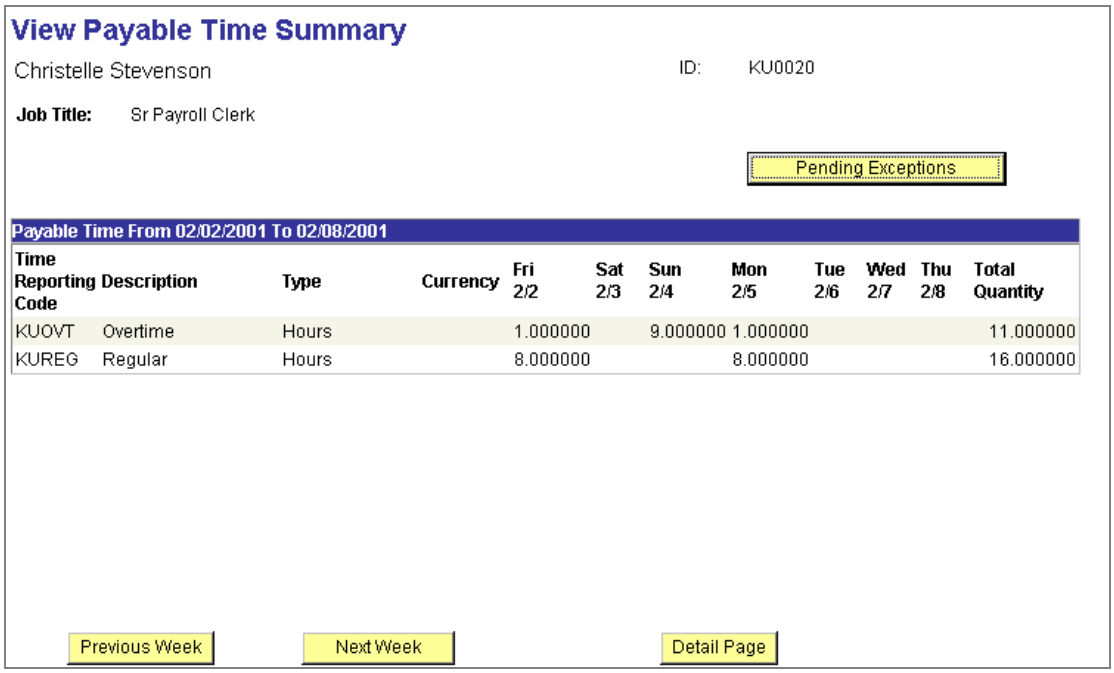
Pages Used to Manage Time

Page Name	*Object Name*	*Navigation*	*Usage*
Payable Time Summary	TL_TM_MPAY_SUMM	• For manager access: Self Service, Manage, View, Payable Time Summary • For employee access: Self Service, Employee, View, Payable Time Summary	View the week-by-week summary of payable time by time reporting code using this display-only page.
Payable Time Detail	TL_MNG_PAY_DET_VW	• For manager access: Self Service, Manage, View, Payable Time Details • For employee access: Self Service, Employee, View, Payable Time Details • Click the Detail Page button on the View Payable Time Summary page.	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.
More Payable Time Information	TL_MNGP_DETAIL_S1	Click **More** on the Forecasted Payable Time Details page.	Display the time reporting and task reporting element details for the payable time.

Page Name	Object Name	Navigation	Usage
Forecasted Payable Time (Summ) (summary)	TL_TMSPAY_SUMM	• For manager access: Self Service, Manage, View, Forecasted Time Summary • For employee access: Self Service, Manage, View, Forecasted Time Summary	View forecasted payable time in summary. The summary forecast payable time page shows the forecast time by employee and by TRC.
Forecasted Payable Time Details	TL_MNG_SPAY_DET_PN	• For manager access: Self Service, Manage, View, Forecasted Time Detail • For employee access: Self Service, Manage, View, Forecasted Time Detail	View forecasted payable time details. This page displays the time in detail for 30 days starting from the day the user selects.

Viewing a Summary of Payable Time

Access Payable Time Summary page.



Payable Time Summary page

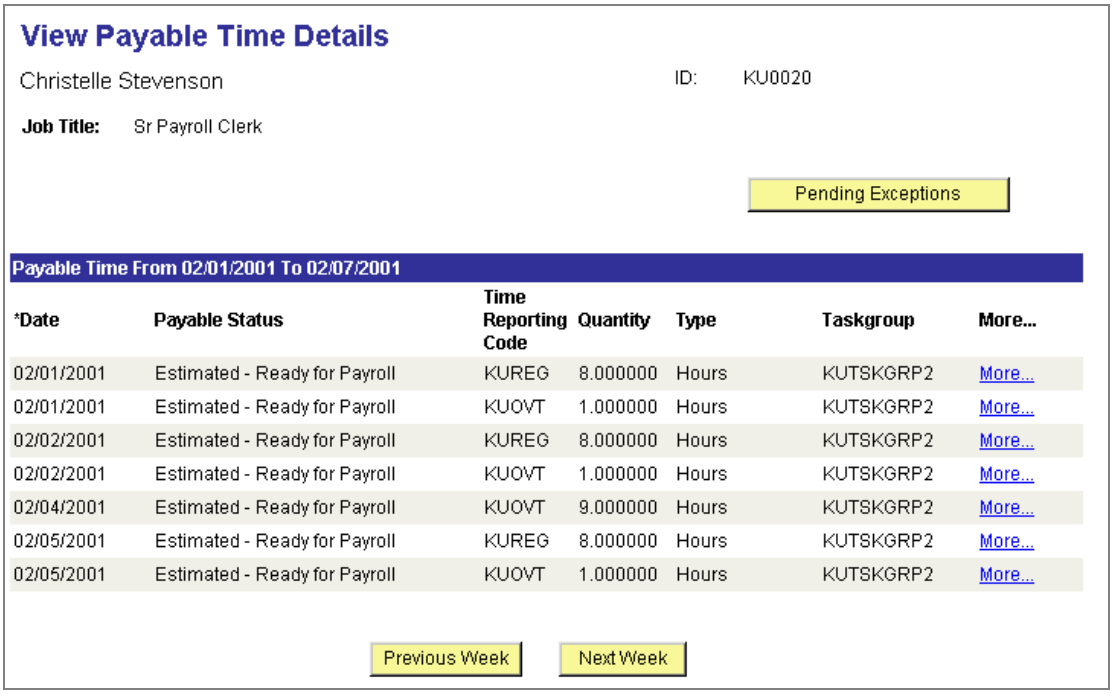
The Payable Time Summary page displays one week's payable time. The time is broken up by date, then by TRC, and then by task. For example, suppose your task profile specifies that your time should be allocated 50 percent to one task and 50 percent to another, then you would see 2 rows for the same date and TRC. However, by going to the Payable Time Details page you can view the details on how it is broken up.

Pending Exceptions	This button appears if exceptions were generated. Click to access the Manage Exceptions page.
Previous Week and **Next Week**	Click to view a different week's summary of payable time.
Detail Page	Click to access the Payable Time Details page.

Note. Time that has generated exceptions does not appear on this page because it is not considered payable time.

Viewing Details of Payable Time

Access the Payable Time Detail page.



View Payable Time Details

Christelle Stevenson ID: KU0020

Job Title: Sr Payroll Clerk

Pending Exceptions

Payable Time From 02/01/2001 To 02/07/2001

*Date	Payable Status	Time Reporting Code	Quantity	Type	Taskgroup	More...
02/01/2001	Estimated - Ready for Payroll	KUREG	8.000000	Hours	KUTSKGRP2	More...
02/01/2001	Estimated - Ready for Payroll	KUOVT	1.000000	Hours	KUTSKGRP2	More...
02/02/2001	Estimated - Ready for Payroll	KUREG	8.000000	Hours	KUTSKGRP2	More...
02/02/2001	Estimated - Ready for Payroll	KUOVT	1.000000	Hours	KUTSKGRP2	More...
02/04/2001	Estimated - Ready for Payroll	KUOVT	9.000000	Hours	KUTSKGRP2	More...
02/05/2001	Estimated - Ready for Payroll	KUREG	8.000000	Hours	KUTSKGRP2	More...
02/05/2001	Estimated - Ready for Payroll	KUOVT	1.000000	Hours	KUTSKGRP2	More...

Previous Week Next Week

Payable Time Detail page

This page displays each day's payable time, including the time reporting code for the time. The employee can manually enter the TRC or the system can generate 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.

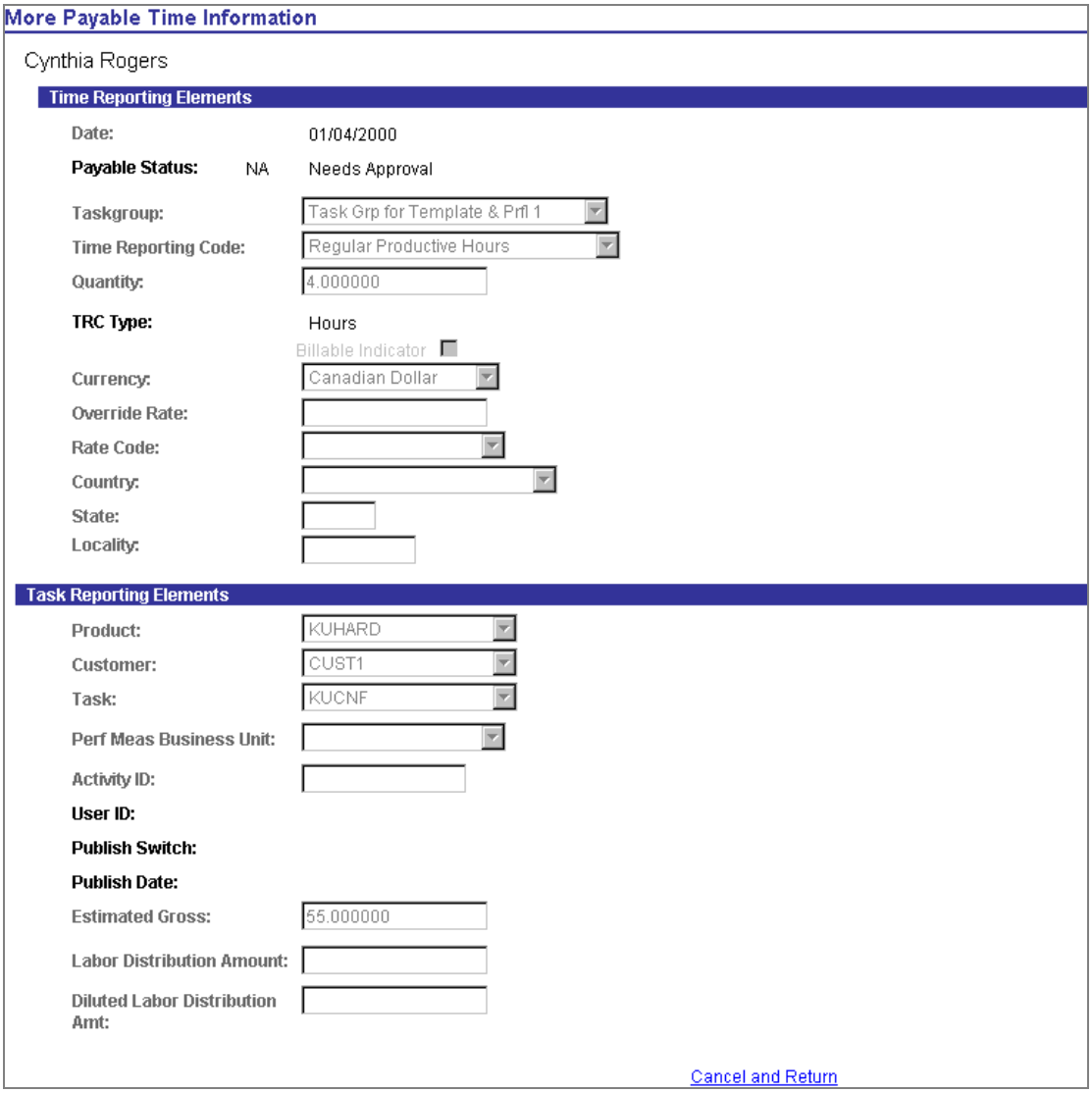
Pending Exceptions	This button appears if exceptions were generated. Click to access the Manage Exceptions page.
Previous Week and **Next Week**	Click to view a different week's summary of payable time.
More	Click to access the More Payable Time Information page.

See Also

"Understanding Payable Time," Understanding Payable Time Fields

Displaying Time and Task Reporting Details for Payable Time

Access the More Payable Time Information page.



More Payable Time Information page

See Also

Entering Additional Information About Elapsed Punch Time

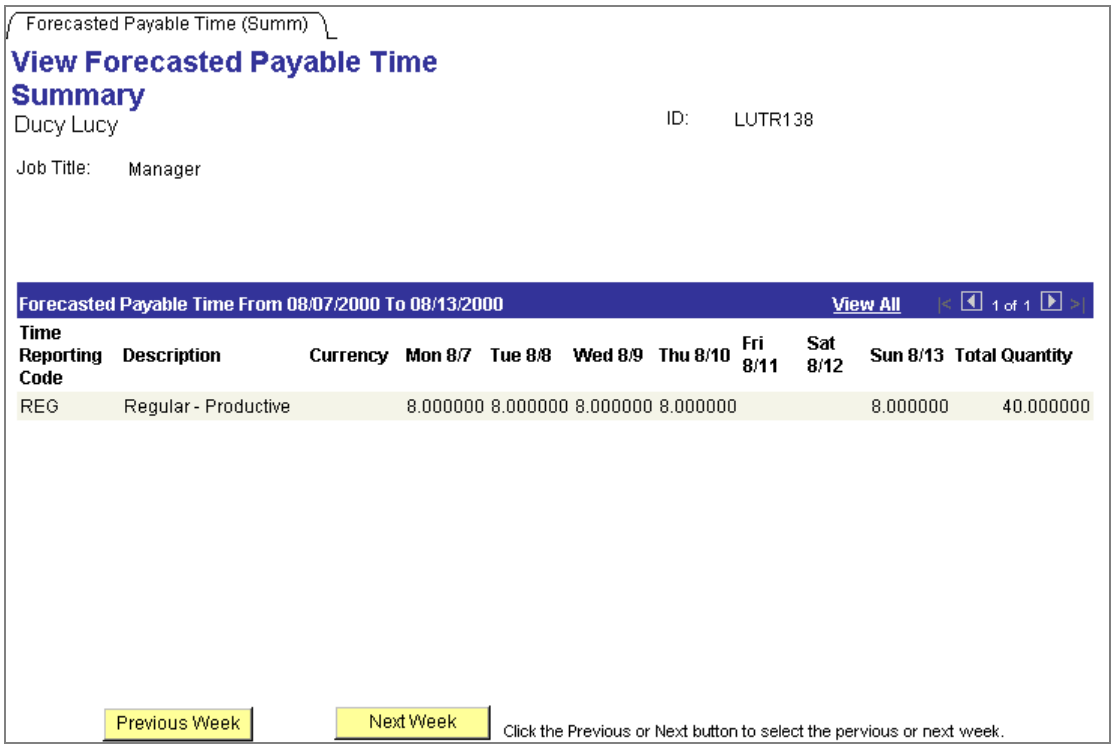
"Reporting Time", Creating Time Reporting Templates

Viewing Forecasted Payable Time

Access the Forecasted Payable Time (Summ) page.

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, you are probably concerned about the number of employees you have working overtime. You may want to get an estimate of what 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.



Forecasted Payable Time (Summ) page

There are three ways to forecast payable time:

- Forecast time for a month or for a specific day using the Time and Labor Launch Pad.
- Forecast time for a period using the Time Administration Run Control.
- Forecast time for the time period associated with the Process Date by clicking the Forecast Payable Time button on the Time Administration Run Control page.

Note. 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.

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.

Previous Week and **Next Week** — Click these buttons to view a different week's summary of payable time.

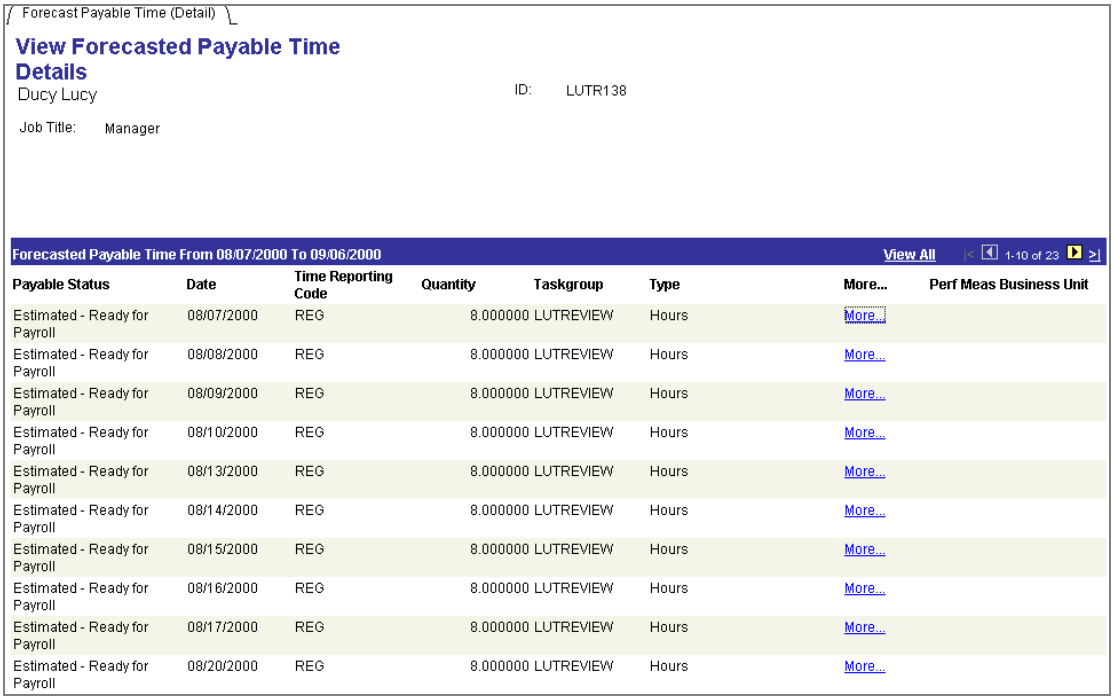
Detail Page — Click this button to access the Forecasted Time Detail page.

See Also

"Understanding Batch Processing in Time Administration", Launching the Time Administration Process

Displaying Time for 30 Days

Access the Forecasted Payable Time Details page.



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

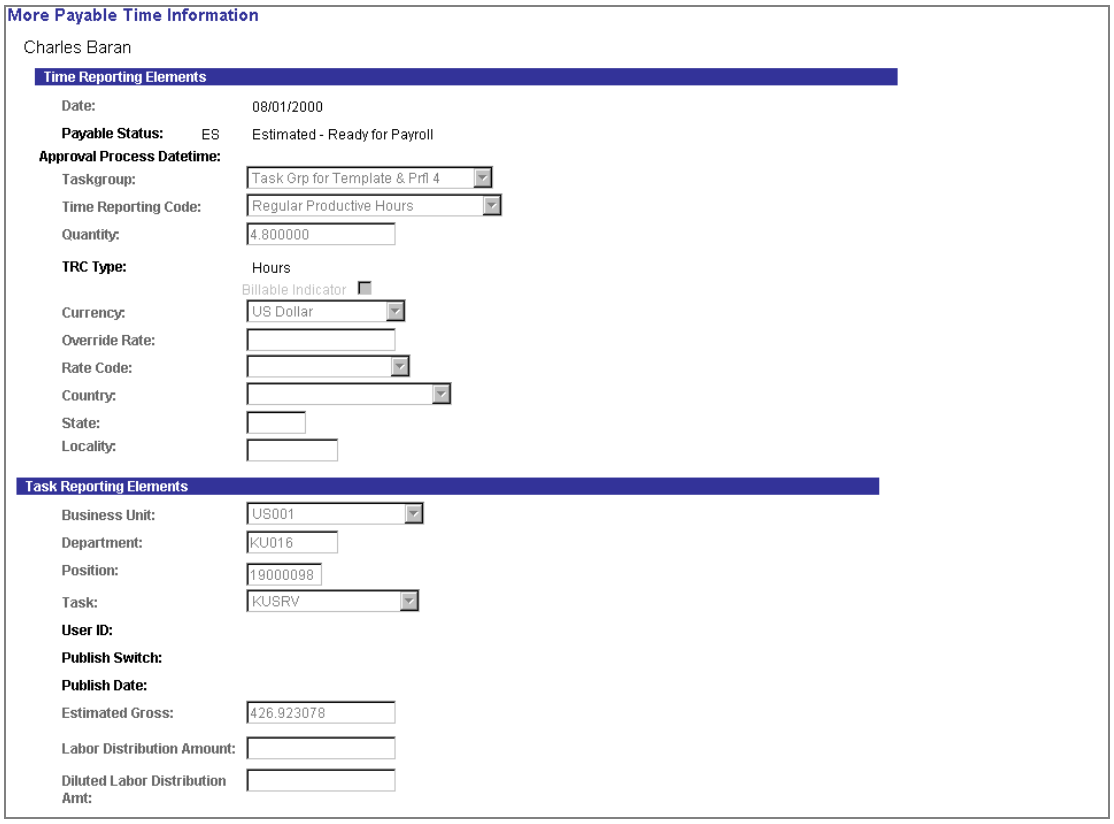
The fields that appear on this page are the same as those on the View Payable Time Details page. For an explanation of these fields, see the View Payable Time Details page.

Approve Date Time and **User ID** — These fields do not appear on this page as they are on the View Payable Time Details page because you do not need to approve forecasted time.

More — Click to access the Time Reporting and Task Reporting Elements that are associated with the time.

Displaying Time and Task Reporting Details for Forecasted Payable Time

Access the More Payable Time Information page.



More Payable Time Information page

See Also

Entering Additional Information About Elapsed Punch Time

"Reporting Time", Creating Time Reporting Templates

CHAPTER 20

Appendix A: PeopleSoft Time and Labor Reports

This chapter provides an overview of Time and Labor reports and enables you to:

- View summary tables of all reports.
- View report details and source records.

PeopleSoft Time and Labor Reports: General Description

This table lists the Running Time and Labor reports, sorted alphanumerically by report ID. The reports listed are all SQR reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
TL001 Payable Status	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.	Administer Workforce, Capture Time and Labor, Reports, Payable Status Report	TL_RUNCTL_TL001
TL002 Generating a Time Card	Displays 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.	Administer Workforce, Capture Time and Labor, Reports, Time Card Report	TL_RUNCTL_TL002

Report ID and Report Name	Description	Navigation	Run Control Page
TL003 TCD Usage	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.	Administer Workforce, Capture Time and Labor, Process, Publish Setup Data to TCD	TL_TCD_RUN_PNL
TL004 Scheduled Hours 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.	Administer Workforce, Capture Time and Labor, Reports, Schedule Hours Report	TL_SCHRPT_RNCTL

PeopleSoft Time and Labor Reports: A to Z

This section provides detailed information on individual reports including important fields and tables accessed. The reports are listed alphabetically by report ID.

TL001- Payable Status

Note. From a troubleshooting perspective, after your pay period has passed, check to see whether 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.

Payable Status Values

Based on your selection on the Payable Status Run Control, the following nine valid values may appear:

Approved Payable Time in this status is approved in Time and Labor and is ready for a payroll system to select it for payment. 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 in PeopleSoft Projects. Payable Time is in a Frozen State and can be selected by other financial systems as actual costs. Payable Time that is closed is the result of one of the following situations: • TRC reported is not being sent to a Payroll System. • Time Reporter is not sending time to a payroll system. • A record adjustment. • Payable Time is going to a payroll system but is not 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 financials 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 PeopleSoft 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, since 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 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, check to see whether 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 samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.

This report provides functionality to replace the Scheduled Hours report, TL009.SQR in prior versions.

Source Record

PS_TL_PAYABLE_TIME

See Also

"Understanding Payable Time"

"Defining Work Schedules"

PeopleTools PeopleBook, "Process Scheduler"

TL002 - Generating a Time Card

Include/Exclude Indicator	Use 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.

For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.

Source Records

PS_TL_RPTD_ELPTIME, PS_TL_EXCEPTION, PS_TL_RPTD_PCHTIME, PS_TL_PAYABLE_TIME

See Also

PeopleTools PeopleBook, "Process Scheduler"

TL003 - TCD Usage

Message Publish Attributes

Publish To

Select **All Msg Nodes/Comm Servers** if you want the system to publish the information to all your TCDs (message nodes).

- Select **Specific Msg Nodes/Comm Servers** 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** group box appears. 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 that you select.

TCD Usage Report Attributes

Generate TCD Usage Reports (generate time collection device 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 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

Choose a language code for your report.

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

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 Profile ID
  - Description
- Task templates
  - Task template
  - Description
- Task elements
  - Task Template ID
  - Task element code
  - Description

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_RPTEL_TAO, PS_TL_SUPVR_TAO

See Also

PeopleTools PeopleBook, "Process Scheduler"

"Using Time Collection Devices (TCDs)"

TL004 - Scheduled Hours Report

Include/Exclude Indicator When running this report for a group, use 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 samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation.

Source Record

PS_SCH_ADHOC_RPT

See Also

"Defining Work Schedules "

PeopleTools PeopleBook, "Process Scheduler"

CHAPTER 21

Appendix B: Exceptions and Validations

This appendix lists PeopleSoft Time and Labor exceptions and validations. The following table is ordered by validation definition ID number.

Nbr	*Validation Definition ID*	*Validation Definition*	*Validation Comments*	*Exception Definition ID*	*Exception Description*	*Processed in Time Admin.*
1	TLX00001	Invalid Comp Time TRC/Balance	Verify that: The Reported Comp Time TRC is valid 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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
4	TLX00040	Valid Taskgroup	Verify that the Taskgroup is in the TL_TASKGRP_TB 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	
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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
9	TLX00090	All/ None Reqd 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, 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, 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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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, 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
32	TLX00241	RESOURCE_TYPE	Verify that the RESOURCE_TYPE reported in Elapsed Time exists in TL_PROJ_RTYPE_V when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX00241	Invalid Resource Type	X

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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
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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
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	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
44	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.
45	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
46	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
47	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
48	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
49	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
50	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
51	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
52	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
53	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
54	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
55	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	
56	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	
57	TLX00420	Valid TRC	Verify that the reported TRC exists in the TL_TRC_TBL.	TLX00420	Invalid TRC	X
58	TLX00430	Active TRC	Verify that the TRC is 'Active' as of the date reported.	TLX00430	Inactive TRC	X
59	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
60	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
61	TLX00480	COMP_RATECD	Verify that the COMP_RATECD reported is neither of 'Percent' type nor of 'Points' type.	TLX00480	Invalid Comp Rate Code Type	
62	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
63	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
64	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	
65	TLX00520	COMP_RATECD & TRC Reported	Verify that a TRC is reported when a COMP_RATECD is reported.	TLX00520	TRC needed for Comp Rate Code	
66	TLX00530	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is a valid COMP_RATECD.	TLX00530	Invalid Comp Rate Code	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
67	TLX00540	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is 'Active' as of the date reported.	TLX00540	Inactive Comp Rate Code	
68	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	
69	TLX00560	BILLABLE_IND	Verify that BILLABLE_IND reported in Elapsed Time has the value of either 'Y' or 'N'.	TLX00560	Invalid Billable Indicator	
70	TLX00570	COUNTRY	Verify that the COUNTRY reported in Elapsed Time is in the COUNTRY_TBL.	TLX00570	Invalid Country	X
71	TLX00580	COUNTRY-P	Verify that COUNTRY reported in Punch Time is in the COUNTRY_TBL.	TLX00580	Invalid Country	X
72	TLX00590	CURRENCY_CD	Verify that the CURRENCY_CD reported in Elapsed Time is in the CURRENCY_CD_TBL.	TLX00590	Invalid Currency Code	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
73	TLX00600	LOCALITY	Verify that the LOCALITY reported in Elapsed Time is in the LOCAL_TAX_TBL.	TLX00600	Invalid Locality	X
74	TLX00610	LOCALITY-P	Verify that the LOCALITY reported in Punch Time is in the LOCAL_TAX_TBL.	TLX00610	Invalid Locality	X
75	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	
76	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	
77	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	
78	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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
79	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	
80	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	
81	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	
82	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	
83	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	
84	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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
85	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	
86	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	
87	TLX00740	STATE	Verify that the STATE reported in Elapsed Time is in the STATE_NAMES_TBL.	TLX00740	Invalid State	X
88	TLX00750	STATE-P	Verify that the STATE reported in Punch Time is in the STATE_NAMES_TBL.	TLX00750	Invalid State	X
89	TLX00800	TIMEZONE	Verify that the TIMEZONE reported in Punch Time is in the PSTIMEZONE table.	TLX00800	Invalid Time Zone	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
90	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
91	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
92	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	
93	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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
94	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	
95	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	
96	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	
97	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
98	TLX00900	Active Taskgroup - P	Verify that the Taskgroup reported is 'Active' as of the date reported in Punch Time.	TLX00900	Inactive Taskgroup	X
99	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
100	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
101	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
102	TLX00940	All/None Reqd 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	
103	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	

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
104	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
105	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
106	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
107	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
108	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.
109	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
110	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
111	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
112	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

Nbr	*Validation Definition ID*	*Validation Definition*	*Validation Comments*	*Exception Definition ID*	*Exception Description*	*Processed in Time Admin.*
113	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
114	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
115	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
116	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
117	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
118	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
119	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
120	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
121	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
122	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
123	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
124	TLX01160	RESOURCE_TYPE-P	Verify that RESOURCE_TYPE is not reported through Punch Time when PS/Projects is not installed.	TLX01160	Invalid Resource Type	X
125	TLX01170	RESOURCE_TYPE-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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
126	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
127	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
128	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.
129	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
130	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
131	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
132	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
133	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
134	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.
135	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
136	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
137	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.
138	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
139	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
140	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
141	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
142	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
143	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
144	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
145	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
146	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
147	TLX01430	RESOURCE_TYPE-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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
148	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	
149	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
150	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
151	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.
152	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	
153	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	
154	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	
155	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	
156	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	
157	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

Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Description	Processed in Time Admin.
158	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
159	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
160	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
161	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
162	TLX01590	Cannot report Override rate	Validate that OVERRIDE_RATE is not reported along with an Amount type TRC.	TLX01590	Cannot report Override Rate	X

CHAPTER 22

Appendix C: TCD Interface

This appendix provides an overview of the Time Collection Device (TCD) reporting feature in PeopleSoft Time and Labor and discusses:

- Input data sent to the various TCD systems.
- Output data produced by the various TCD systems.
- Objects received by the TCD.
- Objects sent from the TCD.

Understanding the TCD Interface

This section discusses the interface process between PeopleSoft Time and Labor and third-party data collection systems. The term *TCD* 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 the PeopleSoft 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:

1. Identifies a generic set of input data to be sent to the various TCD systems. Each TCD vendor determines 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 populates all required fields and optional fields when applicable.
3. Provides TCD vendors with the following detailed information to implement the interface process:
    - Instructions to implement the PeopleSoft standard EIP.
    - Information to interpret the input data elements and data structures and their relationships.
    - 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 collectively determine the frequency of communications on an implementation to implementation basis.

Note. To research the technical details of any Enterprise Integration Point (EIP) used by PeopleSoft applications, refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of Customer Connection.

Sending Input Data to the TCD System

PeopleSoft Time and Labor interfaces with many data collection systems. Input data to be sent to the TCD system varies by vendor. To accommodate as many vendors as possible, PeopleSoft enables you to define a generic set of input data to pass to your TCD. The TCD vendor uses only the data it must send to TCDs to meet the customer's time reporting needs.

PeopleSoft Time and Labor uses the definitions of TCD type to control the data going to your TCD. It does not send data that your TCD cannot process. This reduces the traffic on the network and 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.
	Empl RCD#	Num	3	TL_EMPL_DATA	Identifier used in PS applications to accommodate multiple concurrent jobs (positions).
	Badge ID	Char	20	BADGE_TABLE	Identifier.
	Time Reporting Status	Char	1	TL_EMPL_DATA	Active or Inactive.
	Last Name	Char	30	PERSONAL_DATA	Last name.
	First Name	Char	30	PERSONAL_DATA	First name.
	Hire Date	Date	10	EMPLOYMENT	Needed for calculating anniversary date.
	Service Date	Date	10	EMPLOYMENT	Needed for determining seniority.
	Birth Date	Date	10	PERSONAL_DATA	Needed for displaying a 'Happy Birthday' message.

#	Data Element	Type	Len	Source	Notes
	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.
	Task Template ID	Char	10	TL_TASKGRP_TBL	Identifies the employee's task template ID.
	Task Profile ID	Char	10	TL_EMPL_DATA	Identifies the employee's task profile.

With a few exceptions, PeopleSoft Time and Labor obtains this information from the Employee Profile process and direct selects from tables. The Restriction Profile ID is 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 is 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 was just 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 TCDs to which this reporter can report time.

Schedule

The Schedule data structure contains time reporters' daily schedules.

Time reporters' daily schedules are provided to your TCD. The TCD uses this 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 issues warning/error messages or prevents the user from using it.

The TCD definition defines whether this type of TCD can accept schedules. PeopleSoft Time and Labor 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.

#	Data Element	Type	Len	Source	Notes
	Empl Rcd#	Num	3	TL_EMPL_DATA	Identifier.
	Punch Date Time	DateTime	See Interface Specifications (Appendix F)	TL_SCHEDULE	Identifier.
	Sequence Number	Num	3	TL_SCHEDULE	Identifier – needed when schedule spans multiple days.
	Punch Type	Char	1	TL_SCHEDULE	(1 = In, 2 = Out, 3 = Meal, 4 = Break, 5 = Transfer).

Note. 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 must 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 requires restriction profiles to determine when to allow or disallow punches to occur.

The TCD definition defines whether this type of TCD can accept schedules. PeopleSoft Time and Labor does not send schedules or restriction profiles if the TCD cannot process 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.

#	Data Element	Type	Len	Source	Notes
	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. PeopleSoft provides 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 this type of TCD can accept hours.

#	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.

Note. Total Hours information comes from the Payable Time Table. To determine total payable hours, Time Administration (Apply Rules) must be executed before such data can be published.

Time Reporting Code

This data structure contains a list of Time Reporting Codes (TRCs) that are allowable at your TCD (such as sick, vacation, holiday, meal allowance, and so on). 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

- The interface process only extracts TRCs with the Send To TCD field = *Y*. The default for this field is *N*. Ensure 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.

#	Data Element	Type	Len	Source	Notes
	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 used in the Labor Distribution process in PeopleSoft Time and Labor. The system requires 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 AAAAA. The valid Task Profiles for TCD AAAAA 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 tasks and their cost allocation information remains unchanged. A time reporter swipes the badge 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.

The TCD Task Profile table is 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 selects only 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 required 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 AAAAA. The valid Task Templates for TCD AAAAA 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 their 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 provides all the valid values for certain task elements.

The following tables are sent to the TCDs for positive task element reporting:

#	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.

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 does not present a list of templates to select from, a default template is sent for each time reporter in the Time Reporter message. This default enables automatic 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.

The Task Template Detail Table contains all the valid Task Element Codes associated with each Task Template. It is 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 adds the Rule Element list to the end of each template. The Rule Element codes are 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)	Because PROJECT values and ACTIVITY values can come from two different places, the Source field will be filled in only for those Task Element Codes.

The Task Element Code Value Table contains all the valid values associated with each Task Element Code. It is 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 uses 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. Ensure that the TCD system can process such a large volume of data.

Reporting Element Tables

Sometimes the Time Reporter has to supply information on the location tax purposes. The time reporter or the supervisor may also have to enter override rate information. The following tables contain 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.

Receiving Output Data from the TCD System

The TCD system produces 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, and so on.).
4.	Elapsed Task Interface	Contains elapsed task transactions related to elapsed time transactions (child of Elapsed Time).

PeopleSoft Time and Labor 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 through 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.

Because a time reporter can report time at more than one TCD, PeopleSoft Time and Labor must 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 are 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	DateTime	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, and so on (see end of Appendix E for complete list of valid values)

#	Data Element	Type	Len	Required	Notes
	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	DateTime	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 obtains 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 PeopleSoft Time and Labor assumes Taskgroup borrowing has occurred and finds 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 system assumes Taskgroup borrowing has occurred and finds 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, PeopleSoft Time and Labor uses the values on the interface if present. If not present, the system checks the TCD definition to see if these values are

specified at the TCD. If they are, PeopleSoft Time and Labor uses the TCD definition values. In either case, the system compares these values to the Time Reporter's values in HR. PeopleSoft Time and Labor uses 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 PeopleSoft Time and Labor. 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 is a delete of a day and then an add of what the day should be. For this to occur, the TCD must 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 Time and Labor 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 Time and Labor 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	DateTime	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 also passes Rule Elements on this table. Rule Elements look similar to task elements. PeopleSoft Time and Labor distinguishes them by the element code and splits 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 process 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, and so on.):

#	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

#	Data Element	Type	Len	Required	Notes
	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 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 assumes the currency code attached to the Time Reporting Code definition unless a currency code comes in on this record.

PeopleSoft Time and Labor compares the Task Template ID on the Elapsed Time record to the Task Template ID on the time reporter's Taskgroup. If the Task Template IDs do not match, then the system assumes Taskgroup borrowing has occurred and finds a Taskgroup that contains the Task Template ID.

PeopleSoft Time and Labor 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 the system assumes Taskgroup borrowing has occurred and finds 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 has a generic "Override at TCD" reason.

For Country, State and Locality, PeopleSoft Time and Labor uses the values on the interface if present. If not present, the system checks the TCD definition to see if these values are specified at the TCD. If they are, the system uses the TCD definition values. In either case, PeopleSoft Time and Labor compares these values to the time reporter's values in HR. The system uses 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 PeopleSoft Time and Labor. 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 is a delete and then an add of what the day should be. For this to occur, the TCD must 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 Time and Labor 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 Time and Labor 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 also passes Rule Elements on this table. Rule Elements look similar to task elements. PeopleSoft Time and Labor distinguishes the difference by the element code and splits 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.

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. Use this report to monitor memory usage at the TCD.

Objects 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
	EMPL_RCD	Empl RCD#	Num	3
	BADGE_ID	Badge ID	Char	20
	TIME_RPTG_STATUS	Time Reporting Status	Char	1
	LAST_NAME	Last Name	Char	30
	FIRST_NAME	First Name	Char	30
	HIRE_DT	Hire Date	Date	10
	SERVICE_DT	Service Date	Date	10
	BIRTHDATE	Birth Date	Date	10
	RESTRICTION_PRF_ID	Restriction Profile ID	Char	10
	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
	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
	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

#	Data Element	Description	Type	Len
	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_SUPERVSOR_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

#	Data Element	Description	Type	Len
	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

   a. 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

   b. 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 the following possible values	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 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

#	Data Element	Description	Type	Len
	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

#	Data Element	Description	Type	Len
	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

#	Data Element	Description	Type	Len
	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)
BUP	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

Task Element Code	*Description*
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.

Value	*Description*
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 23

Appendix D: Referential Integrity

This appendix provides a table listing the situations when Referential Integrity is initiated and is processed through Time Administration.

See Also

"Introduction to PeopleSoft Time and Labor," Background Processing, Referential Integrity

"Understanding Batch Processing in Time Administration"

Referential Integrity Triggers

Page	*Prompt on Page*	*System Action*	*Validation ID*	*Trigger TA?*
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

Page	*Prompt on Page*	*System Action*	*Validation ID*	*Trigger TA?*
	Rate	Update	TLX00470	Y
	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
	Task Template	Update	TLX00090	Y

Page	*Prompt on Page*	*System Action*	*Validation ID*	*Trigger TA?*
			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
			TLX00830	
Leave Plan Table	Maximum Negative Hours Allowed	Update	TLX00010	Y
	Accrued Balance Goes Negative	Update	TLX00010	Y

Page	*Prompt on Page*	*System Action*	*Validation ID*	*Trigger TA?*
Leave Plans (USA)	Benefit Plan	Add/Update	TLX00010	Y
	Plan Type	Update	TLX00010	Y
	Coverage Election	Update	TLX00010	Y

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