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PeopleSoft Enterprise Time and Labor 9.0 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xxv

PeopleSoft Enterprise Application Prerequisites xxv

Application Fundamentals xxv

Documentation Updates and Printed Documentation xxvi

Obtaining Documentation Updates xxvi

Downloading and Ordering Printed Documentation xxvi

Additional Resources xxvii

Typographical Conventions and Visual Cues xxviii

Typographical Conventions xxviii

Visual Cues xxix

Country, Region, and Industry Identifiers xxix

Currency Codes xxx

Comments and Suggestions xxx

Common Elements Used in PeopleBooks xxx

Preface

PeopleSoft Enterprise Time and Labor Preface xxxiii

PeopleSoft Products xxxiii

PeopleSoft Enterprise HRMS Application Fundamentals xxxiii

PeopleBook Structure xxxiii

Chapter 1

Getting Started with Time and Labor 1

Time and Labor Overview 1

Time and Labor Business Processes 1

Time and Labor Integrations 2

Time and Labor Implementation 3

Chapter 2

Navigating in Time and Labor 7

Navigating in Time and Labor 7

Pages Used to Navigate in Time and Labor 7

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Chapter 3
Understanding Time and Labor.....9
Scheduling.....9
Time Reporting Methods.....10
Time Administration.....11
Time Management Features.....11
User Preferences.....12
Configurable Manager Views.....12
Delivered Data Archive Templates.....12

Chapter 4
Setting Up Basic Tables.....15
Understanding Time and Labor Implementation.....15
Human Resource Tables.....17
Benefits Tables.....17
Time Zone Offsets Table.....18
Concurrent Batch Processing.....19
Concurrent Online Processing.....19
Time Periods.....20
Periods and Period Instances.....22
Planned Overtime Features.....23
Time Period Calendars.....23
Manager Time Calendar View Options.....24
Compensatory Time Plans.....24
Exceptions.....25
PeopleSoft Application Engine Sections.....26
Validation Criteria.....26
Setting Up System Defaults and Loading Dates.....26
Pages Used to Set Up System Defaults and Load Dates.....27
Setting Up System Defaults.....27
Configurations.....36
Loading Dates.....38
The Purpose of Load Dates.....38
Manager Search Defaults.....39
Email Notification.....40
Payroll System Options.....42
Page Used to Establish Payroll System Options.....43
Establishing Payroll System Options.....43
Establishing Time Periods.....43

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Pages Used to Establish Time Periods....44
Establishing a Daily Time Period....44
Establishing a Weekly Time Period....46
Establishing a Monthly Time Period....46
Establishing a Complex Time Period....47
Establishing a Repeating Time Period....47
Setting Up Planned Overtime Features....48
Prerequisites....49
Pages Used to Set Up Overtime Features....49
Creating Overtime Limits....49
Viewing the TRCs in a Value List....51
Assigning Overtime Limits to Workgroups....52
Enabling Workflow....52
Building and Viewing Time Period Calendars....53
Understanding General Rules for Building Periods and Calendars....53
Pages Used to Build and View Time Period Calendars....59
Creating Instances of a Time and Labor Time Period Calendar....59
Viewing Time Period Instances for a Calendar....61
Setting Up Manager Time Calendar View Options....61
Understanding Manager Time Calendar Views....62
Prerequisites....62
Pages Used to Set Up Calendar Viewing Options....62
Defining Time Calendar View Options....62
Previewing the Time Calendar Legend....65
Establishing Compensatory Time Plans....66
Page Used to Set Up Compensatory Time Plans....66
Setting Up Compensatory Time Plans....66
Defining Exceptions....68
Page Used to Define Exceptions....68
Defining Exceptions and Assigning Message Numbers....68
Defining PeopleSoft Application Engine Sections....70
Page Used to Define PeopleSoft Application Engine Sections....70
Defining a PeopleSoft Application Engine Section....70
Using Validation Criteria....71
Pages Used to Define and Group Validation IDs....72
Defining Validation IDs....72
Grouping Validation IDs....73
Defining Override Reason Codes....74
Page Used to Define Override Reason Codes....74
Defining Override Reason Codes....74

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Chapter 5
Establishing Workgroups.....75
Understanding Workgroups.....75
Common Elements Used in This Chapter.....75
Workgroup Requirements.....76
Workgroups and Referential Integrity.....76
Setting Up Workgroups.....77
Page Used to Define Workgroups.....78
Entering Basic Parameters, Approvals and Status.....78
Defining the Reporting Time Type Group Box.....80
Defining Compensation Controls.....80
Setting Up Rounding Options.....81
Specifying Workgroup Defaults.....87
Setting Up Day Breaker Options.....89
Making Workgroup Transfers.....97
Making Changes to a Rule Program of a Workgroup.....99

Chapter 6
Establishing Time Reporting Codes.....101
Understanding Time Reporting Codes.....101
Common Elements Used in This Chapter.....101
Defining Time Reporting Code (TRC) Categories.....102
Pages Used to Define Time Reporting Code (TRC) Categories.....102
Defining Time Reporting Code (TRC) Categories.....102
Defining and Mapping Time Reporting Codes (TRCs).....103
Pages Used to Define and Map Time Reporting Codes.....106
Defining Time Reporting Code Attributes.....107
Setting Up Compensation and Interface Options.....114
Defining TRC Programs.....117
Pages Used to Define a TRC Program.....117
Selecting Valid TRCs for a TRC Program.....117
Copying a TRC Program.....118
Defining Units of Measure.....119
Page Used to Define Units of Measure.....119
Naming Units of Measure.....119
Working Through TRC Examples.....120

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Chapter 7
Defining Task Reporting Requirements.....123
Understanding Task Reporting Requirements.....123
Understanding Task Functionality.....123
Understanding Task Reporting Tools.....123
Understanding Types of Task Reporting.....125
Understanding How to Create Task Values in Time and Labor.....126
Using ChartFields in Time and Labor.....132
Understanding Task Reporting with PeopleSoft Financials.....135
Understanding the Sequence for Defining Task Functionality.....137
Creating Task Templates.....139
Page Used to Create Task Templates.....140
Creating a Task Template.....140
Defining and Viewing Task Values in Time and Labor.....145
Pages Used to Define and View TL Entities.....146
Creating and Viewing Codes for Project Costing.....146
Creating and Viewing Activity ID Codes.....147
Creating and Viewing User Fields.....147
Displaying Task Codes Defined in Project Costing and Performance Management.....148
Pages Used to Display Task Codes in Project Costing and Enterprise Performance Management.....149
Displaying Business Unit Information.....149
Displaying Project Codes.....150
Displaying Project Information on the Team Members Page.....151
Displaying Resource Type Codes.....151
Displaying Resource Category Codes.....152
Displaying Business Unit Codes.....152
Creating Task Profiles.....153
Page Used to Create Task Profiles.....154
Creating Task Profiles.....154
Defining Taskgroups.....156
Page Used to Define Taskgroups.....157
Defining a Taskgroup.....157

Chapter 8
Defining Work Schedules.....161
Understanding Work Schedules.....161
Creating Work Schedules and Schedule Definitions.....164
Pages Used to Create Work Schedules, and Schedule Definitions.....164
Setting Up Shifts.....164

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Setting Up Schedule Groups.....168
Defining Workdays.....169
Defining Schedules.....169
Rotating Schedules.....171
Setting Up Schedule Definition — Shifts.....172
Validating Schedules.....174
Pages Used to Validate Schedules.....175
Validating Schedules.....175
Sharing Work Schedules with Global Payroll.....175
Importing Third-Party Schedules.....176
Managing Third-Party Schedules.....185

Chapter 9
Establishing Static and Dynamic Groups.....189
Understanding Static and Dynamic Groups.....189
Understanding Group Security.....189
Setting Group Creation Security.....190
Understanding Group Creation Security.....191
Page Used to Set Group Creation Security.....191
Setting Group Creation Security.....191
Creating and Updating Static Groups.....193
Pages Used to Create and Update Static Groups.....193
Specifying Criteria for Static Group Members.....193
Viewing and Updating Static Group Members.....196
Setting Up Static Group Security.....197
Creating and Updating Dynamic Groups.....198
Pages Used to Create and Update Dynamic Groups.....198
Specifying Criteria for Dynamic Group Members.....198
Previewing Dynamic Group Members.....200
Setting Up Dynamic Group Security.....201
Viewing Dynamic Group Members.....201
Updating Dynamic Group Membership.....201

Chapter 10
Setting Up Time Reporters.....203
Understanding Time Reporter Data.....203
Entering and Maintaining Time Reporter Data.....206
Pages Used to Enter and Maintain Time Reporter Data.....207

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Enrolling Time Reporters.....207
Updating Time Reporter Data.....212
Viewing a Group Membership List.....215
Assigning and Viewing Compensatory Time Plans.....216
Pages Used to Assign and View Compensatory Time Plans.....216
Enrolling Time Reporters in a Compensatory Time Plan.....216
Viewing Compensatory Time Plan History.....217
Assigning Schedules to a Group.....217
Pages Used to Assign Schedules.....218
Assign Schedule to a Group.....218

Chapter 11
Establishing Time and Labor Security.....221
Understanding Row Security Permission Lists.....221
Using Row Security Permission Lists.....222
Pages Used for Using Row Security Permission Lists.....223
Creating Row Security Permission Lists.....223
Viewing Row Security Users.....226

Chapter 12
Creating Rules in Time Administration.....227
Understanding Time Administration.....227
Create Rules Component.....228
Batch Processing Component.....228
Online Processing Component.....229
Understanding Rules.....229
General Setup Steps.....230
Rules from Actions and Conditions and SQL Objects.....230
Rule Step Creation Guidelines.....231
Creating Value Lists.....240
Page Used to Create Value Lists.....240
Grouping Codes Into Value Lists.....240
Defining Rule Elements.....241
Page Used to Define Rule Elements.....241
Creating User-Defined Rule Elements.....241
Specifying Table Access.....242
Page Used to Grant SQL Access to Tables.....242
Granting SQL Access to Tables.....242

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Defining Table Relationships....244
Page Used to Define Table Relationships....245
Creating Table Relationship Definitions....245
Defining Template-Built Rules....246
Pages Used to Create Rules from A Template....266
Creating Rules from A Template....266
Defining and Viewing General Information for A Rule....266
Defining and Viewing Template Rule Conditions and Actions....269
Creating Rules with Actions and Conditions....273
Pages Used to Create Rules with Actions and Conditions....274
Defining and Viewing General Action Information....274
Creating Action Text....276
Copying Actions....279
Defining and Viewing General Condition Information....280
Creating SQL Condition Text....281
Copying Conditions....282
Creating SQL Objects....283
Pages Used to Create SQL Objects....285
Selecting Action Types and Creating SQL Descriptions....287
Entering Free-Form SQL Text....289
Entering Values in the Record-Field of a Table....289
Entering Meta-SQL Parameters....290
Updating A Record-Field....290
Designating Tables in A SQL Object....292
Joining Tables....293
Creating the First Clause of A Select Statement....294
Entering Expression Text for the First Clause of A Select Statement....295
Creating the Where Clause of A SQL Statement....296
Entering Expression Text for the Where Clause of a SQL Statement....297
Copying SQL Objects....297
Working with User Exits....298
Defining Attendance Programs....298
Understanding Tracking Methods....299
Understanding Attendance Program Tasks....300
Pages Used to Define Attendance Programs....301
Specifying Attendance Infractions....301
Specifying Attendance Infraction Actions....302
Viewing Action Thresholds....304
Viewing Attendance Violation History....304
Assembling Rules....305

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Pages Used to Assemble Rules.....305
Entering Basic Information About a Rule.....305
Defining Rule Steps.....307
Viewing the SQL Text of A Rule Step.....309
Copying Rules.....310
Adding Rules to a Rule Program.....311
Pages Used to Add Rules to A Rule Program.....311
Assigning an Attendance Program to a Rule Program.....311
Selecting Rules for a Program.....312

Chapter 13
Understanding the Batch Process in Time Administration.....315
Understanding the Time Administration Process Flow.....315
Overview of the Time Administration Application Engine Processes.....318
Understanding the Time Administration Control Table (TL_TR_STATUS).....328
Batch Processing Terms and Concepts.....328
Step 1: Determining Time Reporters to Process.....329
Using Time Reporter Status in the Selection Process.....330
Defining the Initial Period of Interest.....333
Step 2: Combining Time Reporters Into Batches.....335
Step 3: Resolving Pending Time Reporting Exceptions.....336
Step 4: Building the Rule Map.....336
Determining the Final Period of Interest.....337
Step 5: Building Time Reporter Profiles.....346
Step 6: Explaining the Time Administration Main Batch Loop Driver.....346
Step 7: Explaining Batch Driver Calls of Time Administration.....347
Step 8: Matching Punches.....347
Step 9: Creating Intermediate Payable Time.....348
Understanding the Data Store.....349
Loading the IPT Tables.....350
The IPT Table Structure.....351
Step 10: Tracking Attendance.....356
Step 11: Processing Rules.....356
Step 12: Performing Rounding, Task Distribution and Estimated Gross.....356
Check Leave and Comp Time Balances.....357
Expand Task Profiles.....359
Apply Post Rules Rounding.....360
Calculate Estimated Gross.....360
Step 13: Post Rule Validation.....361

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Step 14: Processing Adjustments....362
Understanding the Adjustment Process....363
Step 15: Updating Payable Time....365
Understanding the Difference between Payable Time and Intermediate Payable Time....365
Understanding How Time Administration Formats Payable Time....365
Step 16: Updating Time Reporter Status....369
Viewing Time Reporter Status....370
Understanding Time Reporter Status....370
Page Used to View Time Reporter Status....370
Viewing Time Reporter Status....370
Launching the Time Administration Process....371
Understanding When the Process is Called....371
Page Used to Start the Time Administration Process....371
Starting the Time Administration Process....371
Restarting Batch Processes in Time and Labor....374
Generating and Viewing Runtime Statistics....374
Understanding Runtime Statistics....375
Pages Used to Generate and View Runtime Statistics....376
Selecting the Runtime Statistics and Date to Generate....377
Viewing Runtime Statistics....378
Viewing Batch Statistics....379
Viewing Application Engine Statistics....379
Viewing Batch Data....380
Viewing Batch Details....381
Viewing Archived Rule Maps....382
Viewing the Archive Rule Map Details....383
Using Batch Processing Tips....383

Chapter 14
Understanding Payable Time....387
Understanding Payable Time....387
Payable Time Attributes....387
Payable Time Status and Reason Codes....389
Summary of System Settings that Determine Payable Time Status....397
Publishing Estimated and Actual Payable Time....398
Publishing Payable Time with Estimated Costs....398
Publishing Payable Time with Actual Costs....398
Understanding Payable Time Fields....399
Generating a Payable Status Report....403

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Page Used To Generate a Payable Status Report.....403
Generating a Payable Status Report.....403

Chapter 15
Reporting Time.....407
Understanding Time Reporting.....407
Creating Time Reporting Templates.....408
Understanding Time Reporting Templates.....409
Page Used to Create Time Reporting Templates.....410
Specifying Fields to Display on The Time Entry Pages.....410
Creating Templates for Rapid Time Reporting.....415
Understanding Rapid Time Reporting.....415
Page Used to Create Templates for Rapid Time Reporting.....416
Selecting Fields to Display on The Rapid Time Reporting Page.....416
Reporting Time Rapidly.....420
Understanding Rapid Time Reporting.....420
Pages Used to Report Time.....421
Reporting Time Quickly.....421
Generating a Time Card.....424

Chapter 16
Using Time Collection Devices.....425
Understanding TCDs.....425
Understanding TCD Setup and Data Integration.....426
TCD Setup Process Flow.....426
Integration Points Used to Publish Data to Time and Labor.....428
Understanding XML Integration.....428
Understanding Flat File Integration.....428
Defining TCD Setup Data in Time and Labor.....431
Pages Used to Define TCD Setup Data in Time and Labor.....432
Establishing Data Elements to Send to a TCD.....432
Establishing Basic Information About a TCD.....436
Establishing Physical and Taskgroup Information for a TCD.....439
Establishing TCD Supervisors.....441
Establishing Restriction Profile Data.....441
Setting Up TCD Groups.....443
Sending Setup Data to a TCD.....443
Understanding Data Publishing to a TCD.....444

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Page Used to Send Setup Data to a TCD.....447
Publishing Setup Data to a TCD.....447
Receiving Time from a TCD.....449
Viewing and Resolving TCD Errors.....451
Pages Used to View and Resolve TCD Errors.....451
Viewing TCD Errors.....451
Viewing and Fixing Elapsed Time Errors.....452
Viewing or Amending Elapsed Time Attributes.....454
Viewing and Fixing Punched Time Errors.....455
Viewing and Amending Punched Time Attributes.....456

Chapter 17
Managing Time.....459
Understanding the Time Reporting Process.....459
Prerequisites for Enabling Absences on Timesheets.....460
Common Elements Used in This Chapter.....461
Approving Reported Time.....461
Understanding Approval of Reported Time.....462
Pages Used to Approve Reported Time.....462
Approving Reported Time.....462
Working with Timesheets.....464
Running Online Rules and Viewing Payable Time Detail.....466
Reviewing and Entering Absence Events.....466
Entering Absence Event Details.....468
Forecasting Absence Events.....472
Approving Absence Events.....472
Viewing Reported Hours Summary and Absence Entitlement Balances.....473
Approving Payable Time.....474
Understanding Approval of Payable Time.....474
Pages Used to Approve Time.....475
Approving Payable Time.....475
Approving Payable Time Details.....477
Adjusting Reported Time.....478
Approving Time for a Group of Employees.....479
Managing Exceptions.....480
Understanding Exceptions.....480
Pages Used to Manage Exceptions.....483
Managing Exceptions.....483
Viewing Manage Exception Details.....485

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Viewing Exceptions History....486
Adjusting Time....487
Understanding Adjustments to Payable Time....487
Pages Used to Adjust Time....488
Making Record Only Adjustments....488
Auditing Time....491
Understanding Auditing Time....491
Pages Used to Audit Time....493
Viewing Reported Time....493
Viewing Changes Made to Reported Time....495
Viewing Unprocessed Reported Time....496
Viewing Unprocessed Payable Time....497
Overriding Rules for a Day....498
Page Used to Override Rules for a Day....499
Stopping Rules Processing for a Day....499

Chapter 18
Integrating with Payroll Applications....501
Overview of Payroll Integration....501
General Procedure for Running a Payroll with Payable Time....501
Labor Distribution and Dilution....503
Integrating Time and Labor and Payroll for North America....506
Processing Overview....506
Configuring Time and Labor for Use with Payroll for North America....507
Preparing Time and Labor Data for Payroll for North America....508
Loading Time and Labor Data....509
Running the Payroll Process....511
Reversing or Adjusting a Paycheck....512
Extracting Costs After a Pay Run....512
Adjusting Payable Time....513
Refreshing Data....514
Correcting Errors Generated During the Load and Extract Processes....515
Integrating Time and Labor with Global Payroll....516
Processing Overview....516
Configuring Time and Labor for Integration with Global Payroll....517
Loading Time and Labor Data....518
Correcting Errors Generated by Payable Time....520
Updating Payable Time After a Pay Run....520
Sharing Work Schedules with Global Payroll....521

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Integrating Absence Event Data.....521
Understanding Absence Event Integration with Time and Labor.....521
Integrating Absence Management, Time and Labor, and Payroll for North America.....522
Integrating the Absence Functionality of Global Payroll with Time and Labor.....524

Chapter 19
Integrating with PeopleSoft Financials and Enterprise Performance Management.....527
Understanding Integration.....527
Understanding Integration Points.....527
Integrating with Project Costing.....530
Understanding Project Costing Integration.....531
Setting Up Time and Labor for Integration with Project Costing.....533
Publishing Estimated and Actual Cost Data to Project Costing.....535
Understanding Estimated and Actual Cost Data.....535
Pages Used to Send Estimated and Actual Costs Data to Project Costing.....539
Publishing Estimated Payable Time.....539
Publishing Actual Payable Time.....539
Using Time and Labor with Commitment Accounting.....540
Understanding the Commitment Accounting Interface.....540
Setting Up Time and Labor for Use with Commitment Accounting.....542
Distributing Costs after a Pay Run.....543
Integrating with PeopleSoft Expenses and Mobile Time and Expense.....543
Understanding Integration with Mobile Time and Expense.....543
Setting Up Time and Labor for Use with Mobile Time and Expense.....545
Synchronizing Data.....546
Retrieving Time from Mobile Time and Expense.....546
Integrating with Performance Management.....546

Chapter 20
Using Self-Service Components.....547
Understanding Self-Service Components.....547
Navigating in Time and Labor Home Pages.....548
Using Time and Labor Launch Pad Pages for Employees.....550
Pages Used to Specify Time and Labor Launch Pad Information for Employees.....551
Viewing Employee Hours.....551
Viewing Detailed Calendar Information.....553
Setting Up User Preferences.....556
Pages Used to Set Up User Preferences.....557

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Understanding the User Preferences Page....557
Setting Up User Preferences - Time Reporting....557
Understanding Task Value Defaults....559
Setting Up User Preferences - Schedule Preferences....559
Setting Up User Preferences - Send Notification....561
Reporting Time....561
Common Elements Used in this Section....562
Pages Used in Reporting Time....563
Entering, Viewing, or Changing Employee's Time....563
Timesheet Display: Self-Service Versus Manager Self-Service....566
Entering Single Punches Through the Web Clock....568
Using Mass Time....569
Specifying a Time Reporting Method for Mass Time Reporting....570
Specifying Report Time for Mass Time Reporting....572
Viewing Compensatory Time and Expiration....574
Viewing Time....575
Pages Used to View Time....576
Viewing a Summary of Payable Time....576
Viewing Details of Payable Time....577
Viewing Forecasted Time....579
Requesting Overtime....579
Understanding Overtime Transactions....580
Pages Used to Enter, View, and Process Overtime Requests....580
Viewing Overtime Requests....580
Viewing Details of an Overtime Request....581
Entering Overtime Requests....582

Chapter 21
Using Manager Self-Service Components for Time Management and Reporting....585
Understanding Manager Self-Service Components....585
Navigating in Time and Labor Self-Service Pages for Managers....588
Using Time and Labor Launch Pad Pages for Managers....589
Pages Used to Specify Time and Labor Launch Pad Information for Managers....589
Specifying Employee Information....589
Viewing Employee Time....590
Setting Up Application Suites....593
Application Items for Managers....593
Working with Application Items....594
Reporting Time....595

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Common Elements Used in this Section.....595
Pages Used to Report Time.....596
Assessing Employees' Time at a Summary Level.....596
Entering, Viewing, or Changing Employee's Time.....599
Using Mass Time.....600
Selecting Employees for Mass Time.....600
Managing Time.....602
Pages Used to Manage Time.....603
Viewing a Summary of Payable Time.....603
Viewing Details of Payable Time.....604
Viewing Forecasted Payable Time.....605
Viewing Accumulators.....606
Using Manager Time Calendar Views.....607
Understanding Manager Time Calendars.....607
Common Elements Used in This Section.....608
Pages Used to View Manager Time Calendars.....609
Selecting Time Calendar View Criteria.....610
Viewing Daily Time Calendars.....612
Viewing Weekly and Monthly Time Calendars.....614
Managing Overtime Requests.....616
Understanding Overtime Request Transactions.....616
Pages Used to Manage Overtime Requests.....617
Viewing Employee Overtime Requests.....617
Viewing the Details of an Overtime Request.....618
Viewing Overtime Balances and Limits (Managers).....619
Approving and Denying Multiple Overtime Requests.....620
Approving Single Overtime Requests.....624

Chapter 22
Using Manager Self-Service for Scheduling Components.....627
Understanding Manager Self-Service for Scheduling Components.....627
Setting Up Manager Search Options.....628
Pages Used to Set Up Manager Search Options.....628
Selecting Manager Search Options.....628
Assigning Schedules.....630
Pages Used to Assign Schedules.....631
Assigning Schedules to a Time Reporter.....631
Personal Schedule Definition.....633
Schedule Calendar.....635

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Schedule Calendar Rotations....636
Managing Schedules....637
Common Elements Used in This Section....637
Pages Used to Manage Schedules....637
Setting Up Manage Schedule Display Options....639
Managing Schedules....640
Working with Daily Schedule Detail....643
Scheduling Replacements....646
Copying Schedules....647
Swapping Schedules....648
Integrating Training Data from Learning Management....649
Learning Management....649

Chapter 23
Using Mobile Time Management....651
Prerequisites....651
Understanding Mobile Time Management....651
Mobile Time Management....652
Installing PeopleSoft Mobile Agent....652
Initializing Mobile Time Management....653
Accessing Mobile Time Management....653
Accessing Mobile Time Management From a Laptop....653
Accessing Mobile Time Management From a Pocket PC....654
Navigating Through Mobile Time Management....654
Viewing, Reporting, and Updating Elapsed Time Entries....655
Common Elements Used in This Section....655
Pages Used to View and Report Elapsed Time....655
Reporting and Updating Elapsed Time....656
Viewing Schedules....657
Page Used to View Schedules....657
Synchronizing Data....657
Understanding Mobile Synchronization....657
Synchronizing Mobile Application Data....658

Appendix A
Exceptions and Validations....659
Understanding Exceptions and Validations....659
Timesheets and Online Validations....677

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Weekly Punch Time Reporting Validations.....679
Time and Task Reporting Template Validations.....679

Appendix B
TCD Interface.....681
Understanding the TCD Interface.....681
Input Data Sent to TCD Systems.....682
Output Data Produced by TCD Systems.....693
Objects Received by the TCD.....705
Objects Sent from the TCD.....714
Configuration of the Integration Broker and the TCD.....723
Outgoing Service Operations From PeopleSoft to TCD Server.....723
Routing Rules.....725
Service Operations Monitor.....725
Incoming Service Operations from the TCD Server to the PeopleSoft Server.....725
System and Integration Broker Configuration.....726
Node and Gateway Configuration.....726
Enterprise Components Configuration.....729
Error Handling and Resolution.....732
Frequently Asked Questions.....734

Appendix C
Referential Integrity.....735
Background Processing.....735
Time Administration and Referential Integrity.....740
Time Reporting Codes and Referential Integrity.....741
Task Reporting and Referential Integrity.....743
Prevention of Inactivation or Deletion of Effective-Dated Rows.....743
Execute Edit Error Checking.....743
Nested Effective Dates.....744
Time Administration and Referential Integrity Triggers.....744
Understanding the TCD Interface and Referential Integrity.....748
Prevention of Inactivation or Deletion of Effective-Dated Rows.....748
Execute Edit Error Checking.....749
Nested Effective Dates.....749

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Appendix D
Delivered Workflow for Time and Labor.....751
Delivered Workflow for Time and Labor.....751
Overtime Request.....751

Appendix E
Time and Labor Reports.....753
Time and Labor Reports: A to Z.....753

Glossary of PeopleSoft Enterprise Terms.....755

Index 781

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About This PeopleBook Preface

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

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

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter 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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

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Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.

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Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access 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	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

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PeopleSoft Enterprise Time and Labor Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft HRMS products:

- PeopleSoft Enterprise Time and Labor
- PeopleSoft Enterprise Payroll for North America
- PeopleSoft Enterprise Global Payroll
- PeopleSoft Enterprise Absence Management
- PeopleSoft Enterprise Human Resources

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise Time and Labor operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

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The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

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Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

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CHAPTER 1

Getting Started with Time and Labor

This chapter discusses:

- Time and Labor overview.
- Time and Labor business processes.
- Time and Labor integrations.
- Time and Labor implementation.

Time and Labor Overview

Time and Labor facilitates the management, planning, reporting, and approving of time, and calendar and schedule creation and usage, from one global web-based application.

With this application, you can:

- Schedule time.
- Report time.
- Administer time.
- Distribute time.

Time and Labor Business Processes

Time and Labor provides these business processes:

- Report time.
- Create schedules.
- Organize employee groups.
- Approve time.
- Track compensatory time off.
- Manage security.
- Manage reported time.
- Track task data.
- Forecast payable time.

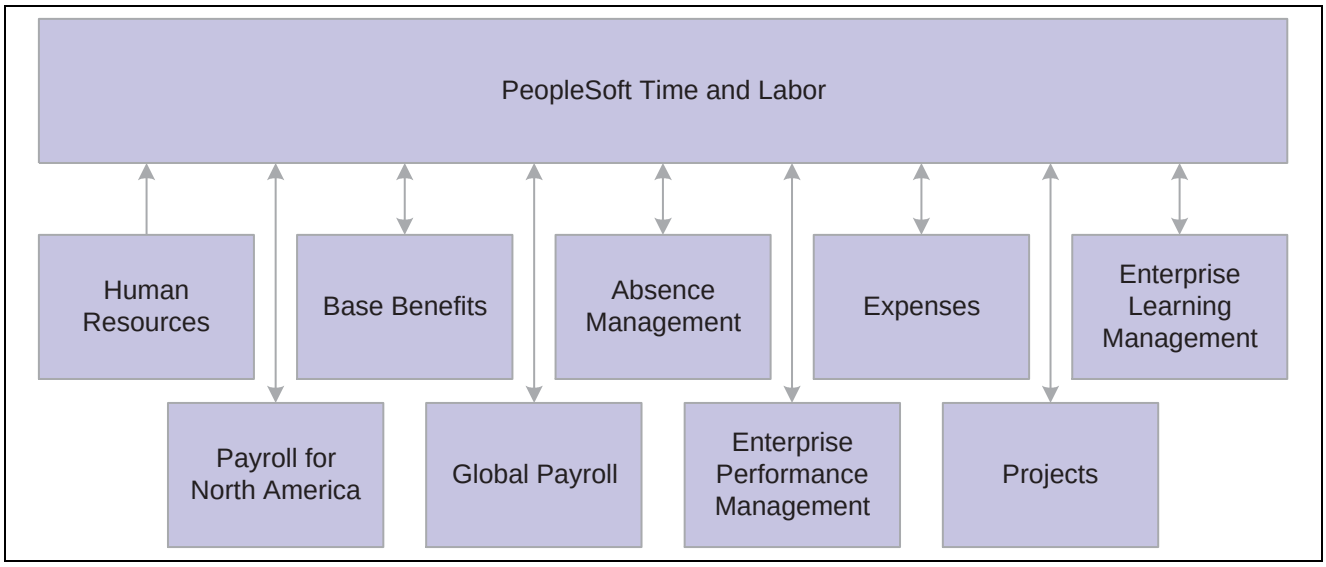
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- Manage exceptions.
- Track attendance.
- Process payable time.
- Create rules for processing time.
- Distribute and dilute labor costs.

We discuss these business processes in the business process chapters in this PeopleBook.

Time and Labor Integrations

Time and Labor integrates with these PeopleSoft applications:



Time and Labor integrations with PeopleSoft applications

We discuss integration considerations in the implementation chapters in this PeopleBook.

Payroll for North America and Global Payroll

Time and Labor shares payable time information with payroll applications, such as Payroll for North America and Global Payroll.

Absence Management

Time and Labor and Absence Management integration comprises a number of features that enable users to add, change, or delete absence events in any component that updates the Absence Event Table and to have that information display, in real time, on either the Timesheet page in Time and Labor or the Self Service Absence pages in Absence Management and Global Payroll.

These features are based on the assumption that customers have one of the following installed application combinations and that the employee is enrolled in Time and Labor:

- Absence Management, Payroll for North America (PNA), and Time and Labor, or
- Global Payroll and Time and Labor

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This integration ensures that reported time in Time and Labor reflects the most up-to-date absence event information and that payable time in Time and Labor reflects the correct cost.

Time Collection Devices

Time and Labor is designed for various types of time collection or capture devices.

Human Resources

PeopleSoft Human Resources provides information for Time and Labor.

PeopleSoft Enterprise Performance Management

Integration between Time and Labor and the PeopleSoft Enterprise Performance Management application enables data to be captured in a data warehouse, so that performance can be measured in a variety of ways.

PeopleSoft Benefits

PeopleSoft Benefits information, such as benefit and leave plans, is used by Time and Labor.

PeopleSoft Project Costing and Expenses

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 the Project Costing and Expenses applications.

Time and Labor Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Time and Labor also provides component interfaces to help you load data from your existing system into PeopleSoft Strategic Sourcing tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	Reference
SCH_DEFINITION	SCH_DEFINITION	See Chapter 8, "Defining Work Schedules," Defining Schedules, page 169.
SCH_SHIFT	SCH_SHIFT	See Chapter 8, "Defining Work Schedules," Setting Up Shifts, page 164.
SCH_WRKDAY	SCH_WRKDAY	See Chapter 8, "Defining Work Schedules," Defining Workdays, page 169.

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Component	Component Interface	Reference
TL_DYNAM_GRP	TL_DYNAM_GRP	See Chapter 9, "Establishing Static and Dynamic Groups," Creating and Updating Dynamic Groups, page 198.
TL_TRCPGM_PNLGRP	TL_TRCPGM_PNLGRP	See Chapter 6, "Establishing Time Reporting Codes," Defining TRC Programs, page 117.
TL_TRC_MAIN_PNLGRP	TL_TRC_MAIN_PNLGRP	See Chapter 6, "Establishing Time Reporting Codes," Defining TRC Programs, page 117.
ACTIVITY_ID	ACTIVITY_ID	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing Activity ID Codes, page 147.
CUSTOMER	CUSTOMER	See Chapter 7, "Defining Task Reporting Requirements," Defining and Viewing Task Values in Time and Labor, page 145.
PRODUCT1	PRODUCT1	See Chapter 7, "Defining Task Reporting Requirements," Understanding How to Create Task Values in Time and Labor, page 126.
PROJECT1	PROJECT1	See Chapter 7, "Defining Task Reporting Requirements," Understanding How to Create Task Values in Time and Labor, page 126.
TASK	TASK	See Chapter 7, "Defining Task Reporting Requirements," Understanding How to Create Task Values in Time and Labor, page 126.
TASKGROUP	TASKGROUP	See Chapter 7, "Defining Task Reporting Requirements," Defining Taskgroups, page 156.
TL_TSKPRF_TEMPLATE	TL_TSKPRF_TEMPLATE	See Chapter 7, "Defining Task Reporting Requirements," Creating Task Profiles, page 153.
TL_TASK_PROFILE	TL_TASK_PROFILE	See Chapter 7, "Defining Task Reporting Requirements," Creating Task Profiles, page 153.
TL_WKG_MAIN_PNLGRP	TL_WKG_MAIN_PNLGRP	See Chapter 8, "Defining Work Schedules," Creating Work Schedules and Schedule Definitions, page 164.

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Component	Component Interface	Reference
TL_RULE_ELEM1_PNLG	TL_RULE_ELEM1_PNLG	See Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241.
TL_RULE_ELEM2_PNLG	TL_RULE_ELEM2_PNLG	See Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241.
TL_RULE_ELEM3_PNLG	TL_RULE_ELEM3_PNLG	See Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241.
TL_RULE_ELEM4_PNLG	TL_RULE_ELEM4_PNLG	See Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241.
TL_RULE_ELEM5_PNLG	TL_RULE_ELEM5_PNLG	See Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241.
TL_USER_FLD1_PNLG	TL_USER_FLD1_PNLG	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing User Fields, page 147.
TL_USER_FLD2_PNLG	TL_USER_FLD2_PNLG	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing User Fields, page 147.
TL_USER_FLD3_PNLG	TL_USER_FLD3_PNLG	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing User Fields, page 147.
TL_USER_FLD4_PNLG	TL_USER_FLD4_PNLG	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing User Fields, page 147.
TL_USER_FLD5_PNLG	TL_USER_FLD5_PNLG	See Chapter 7, "Defining Task Reporting Requirements," Creating and Viewing User Fields, page 147.
TL_TCDGRP_PNLGRP	TL_TCDGRP_PNLGRP	See Chapter 16, "Using Time Collection Devices," Defining TCD Setup Data in Time and Labor, page 431.
TL_TCD_PNLGRP	TL_TCD_PNLGRP	See Chapter 16, "Using Time Collection Devices," Setting Up TCD Groups, page 443.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

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See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

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CHAPTER 2

Navigating in Time and Labor

This chapter discusses how to navigate in Time and Labor.

Navigating in Time and Labor

Time and Labor provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the Time and Labor custom navigation pages, the PeopleSoft system provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in Time and Labor

This table lists the custom navigation pages that are used to navigate in Time and Labor:

Page Name	Navigation	Usage
Time and Labor Set Up Center	Main Menu, Time and Labor, Time and Labor Set Up Center	Define and maintain Time and Labor configuration, including Chartfields.
Installation Options	Click Installation Options on the Time and Labor Set Up Center page.	Define general system defaults and load dates into the system.
Time and Labor Set Up	Click Time and Labor Set Up on the Time and Labor Set Up Center page.	Access the Time Periods, Time Reporting, Rules and Workgroups, Task Elements, Configure Tasks, Schedules, Validation Criteria, Time Collection Devices, and Launch Pad Navigation Suites options.
Time and Labor Security	Click Time and Labor Security on the Time and Labor Set Up Center page.	Access the Group Creation Security, Dynamic Group, Refresh Dynamic Group, Static Group, and TL Permission List Security options.

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Page Name	Navigation	Usage
Enroll Time Reporters	Click Enroll Time Reporters on the Time and Labor Set Up Center page	Maintain time reporter data, compensatory plans, and group schedule assignments.
Time Admin Setup and Tools	Click Time Admin Setup and Tools on the Time and Labor Set Up Center page	Access Time Admin utilities and tools to build custom rules, and analyze statistics and TCD errors.
Calendar View Options	Click Calendar View Options on the Time and Labor Set Up Center page	Define time event options for daily, weekly, and monthly time calendars.
Chartfield Set Up	Click Chartfield Set Up on the Time and Labor Set Up Center page	Define Chartfield information.

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CHAPTER 3

Understanding Time and Labor

This chapter discusses:

- Scheduling.
- Time reporting methods.
- Time administration.
- Time management features.
- User preferences.
- Configurable manager views (manager search options).
- Delivered data archive templates.

Scheduling

There are three scheduling environments that an organization is likely to encounter – fixed, rotating and dynamic. In a fixed schedule environment, employees are assigned a work pattern on hire or on a change in role or situation. The planned work pattern is static and is changed only in special situations. In a rotating schedule environment, schedule rosters are established in advance and assigned to groups of employees on hire or when a new project or period begins. In a dynamic environment, an employee does not have a set schedule; a new schedule is established every period, and updates are made frequently based on a variety of factors.

In each environment, it is important for schedules to be created and maintained systematically to communicate work expectations, track adherence, and reconcile with actual work completed. Time and Labor provides capabilities to support each schedule environment.

For fixed schedule environments, a company may support centralized standard schedule definitions and ad hoc manager-specified work patterns. All schedule building blocks, including shifts, workdays, and schedule definitions, are optional. For example, an organization may want to establish only standard shifts and allow these to be assigned directly to employees.

For rotating schedule environments, a set of rotations, with relative start days, may be defined on a schedule. For example, Crew A may start its rotation on day one of the pattern and Crew B may start on day seven. Schedule patterns are not associated with specific dates until an employee is assigned to the pattern, allowing flexibility and reusability. The scheduler may choose a sample date, however, and view the resulting rotation pattern. Split shifts on one day, and off shifts that are greater or less than 24 hours can be created also. These features are particularly useful for organizations that operate on a 24-hour schedule and must rotate individuals between day shifts and night shifts.

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Dynamic scheduling environments require frequent schedule changes and intelligent scheduling arrangements. Today, the schedule override capabilities are intended for infrequent ad hoc use. In Time and Labor, a generic interface to the open scheduling architecture loads optimized work schedules or data from other systems, including training data from PeopleSoft Enterprise Learning Management. Managers have a graphical interface to view schedules for their employees. In addition to viewing coverage, assigned shifts, and total work hours, managers can identify individuals with planned absences or training. If updates need to be made to the schedule, managers can find replacements, swap shifts, copy schedules, and make short- and long-term schedule changes.

Employees can view their monthly schedule, including work and shift information, planned absences, holidays, and training.

See Also

Chapter 8, "Defining Work Schedules," Understanding Work Schedules, page 161

Chapter 10, "Setting Up Time Reporters," Assigning Schedules to a Group, page 217

Chapter 22, "Using Manager Self-Service for Scheduling Components," page 627

Time Reporting Methods

There are a variety of ways in which time can be reported:

- Timesheet entry.

  Both punch time and elapsed time are reported using the Timesheet page.

- Web clock.

  Enables employees to enter a single punch and provide time and task detail when entering punches.

- Mass time.

  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.

- Rapid time.

  Use rapid reporting templates to design time entry pages for fast reporting.

- TCD interface.

  The TCD Interface uses the PeopleSoft Publish and Subscribe communications methodology in PeopleTools to send and receive data from the TCD system. Data in Time and Labor and the TCD system are synchronized by either a full data replication or an incremental approach (changes only).

- Mobile Time Management.

  PeopleSoft Mobile Time and Labor provides time reporting and viewing capabilities for Pocket PC and laptop computer users while disconnected from the organization's network. This enables users to manage time reporting while working remotely and to submit reported time periodically through synchronization with the server.

- Integration with PeopleSoft Enterprise Absence Management.

  Absence event data that is reported in Absence Management's self service page can made available on Timesheet pages in Time and Labor, and vice versa.

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See Chapter 17, “Managing Time,” Prerequisites for Enabling Absences on Timesheets, page 460.

See Also

Chapter 20, “Using Self-Service Components,” Entering, Viewing, or Changing Employee’s Time, page 563

Chapter 20, “Using Self-Service Components,” Using Mass Time, page 569

Chapter 15, “Reporting Time,” Understanding Rapid Time Reporting, page 415

Chapter 16, “Using Time Collection Devices,” Understanding TCDs, page 425

Chapter 23, “Using Mobile Time Management,” Mobile Time Management, page 652

Time Administration

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

Time administration provides these tools for creating rules:

- Templates for rule calculations.
- Actions and conditions for rules that are too complex to be defined within a template structure.
- SQL objects for complex rules.
- User exits for constructs that cannot be handled through templates or other tools.

See Also

Chapter 12, “Creating Rules in Time Administration,” page 227

Time Management Features

Time management features include:

- Time management alerts.

  The Time Management Alerts page displays occurrences of overtime limit reached, overtime approval required, payable time approval required, exceptions to review, or absence approval required if any occurrences exist and provides a link to a page for each type of occurrence.

- Workforce availability.

  The Workforce Availability page displays a count of employees who are currently logged in, no shows for current shifts, scheduled for current shifts, reported absent for today, reported in training for today, and links to the daily and weekly manager calendar view pages.

- Time calendar views.

  The time calendar view is all a manager needs to view reported time, scheduled time, payable time, exceptions and other information about an employee’s time.

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- Manage exceptions.

  Exceptions are configurable for Time Reporting and the Time Administration process. The Time Administration process will reprocess pending time reporting exceptions and resolve exceptions, minimizing the need for manual intervention.

- Approve reported and payable time, adjust paid time, view payable time and view forecasted payable time.

See Also

Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," page 585

User Preferences

The User Preferences page is used by employees to view and update their schedule and time related preferences, such as preferred shifts and times.

A manager self service version of this page allows managers to view the employees' schedule preferences, to be taken into account for future schedule creation and changes. The manager views only the schedule preferences of the employee; time reporting preferences are not viewable in manager self service.

See Also

Chapter 20, "Using Self-Service Components," Setting Up User Preferences, page 556

Configurable Manager Views

Managers can configure the Default Search Options page to select default criteria and options. Fields and field values can be selected to be used as search criteria, default values, or viewed in a list. This is used on the various manager self service pages to expediently select employees to view and update.

Delivered Data Archive Templates

Data archiving is an important part of any data management system. Specific archiving dependencies exist for Time and Labor. Data should be archived in the following order of precedence:

1. Payable Time table.
2. Reported Time table.
3. Xref_table.
4. Xref_Cost table.

You use the same prompts to archive Payable Time and Reported Time.

This table lists the data archive templates delivered with Time and Labor:

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Base Table /Record Name	Archive Table /Record Name	Template Name	Input Parameter	Comments
TL_PAYABLE_ TIME	TL_PAYABLE_HST	TL_PYTM1 TL_PYTM2	Begin Date End Date	TL_PYTM1 – Archives processed Payable Time (‘PD’,’CL’,’DL’)TL_ PYTM2 – Archives unprocessed Payable Time (’ES’,’NA’,’RP’,’IG’)
TL_PAYABLE_HIST	TL_PAYABLE_HIST	TL_PYTM1 TL_PYTM2	Begin Date End Date	
TL_RPTD_TIME	TL_RPT_TIME_HST	TL_RPDTM	No Parameter	Reported_Time table is archived based on the Payable Time rows that are archived.
TL_EXCEPTION	TL_EXCEPTN_HST	TL EXCEP	Begin Date End Date	
TL_XREF_TBL	TL_XREF_TBL_ HST	TL_XREF	No Parameter	Xref_Table is archived based on Payable Time rows that are archived.
TL_XREF_COST	TL_XREF_COST_ HST	TL_XCOST	No Parameter	Xref_Cost is archived based on Xref_Table rows that are archived
TL_COMPLEAVE_ TBL	TL_COMPLEAVE_ HST	TL_COMP	Begin Date End Date	
TL_COMP_DAY_ BAL	TL_COMP_DAY_ HST	TL_CMPBA	Begin Date End Date	
TL_IPT1_CNT	TL_IPT1_CNT_HST	TL_PYTM1TL_ PYTM2	Begin Date End Date	
TL_RULE_OVRD	TL_RULEOVRD_ HST	TL_RLOVR	Begin Date End Date	
AUDIT_ TLRPTTIME	AUDIT_TLRPT_ HST	TLR_AUDT	Begin Date End Date	
AUDIT_TL_PAY_ TM*	AUDIT_TLPAY_ HST	TL_AUDT	Begin Date End Date	

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Base Table /Record Name	Archive Table /Record Name	Template Name	Input Parameter	Comments
SCH_AUDIT_TBL	SCH_AUDIT_HST	TL_SCADT	Begin Date End Date	
SCH_MNG_ SCHTBL	SCH_MNG_SCH_ HST	SCH_MNG_SCH_ HST	Begin Date End Date	
SCH_ADHOC_DTL	SCH_ADHODTL_ HST	TL_SCADH	Begin Date End Date	
SCH_EXT_DTL	SCH_EXT_DTL_ HST	TL_SCXDT	Begin Date End Date	
TL_FRCS_PYBL_ TM	TL_FRCSPYBL_ HST	TL_FRCPA	Begin Date End Date	
TL_OT_DATA	TL_OT_DATA_HST	TL_OTDAT	Begin Date End Date	
TL_OT_STATUS	TL_OTSTATUS_ HST	TL_OTDAT	Begin Date End Date	
TL_TR_ COMMENTS	TL_COMMENTS_ HST	TL_COMMT	Begin Date End Date	

*The AUDIT_TL_PAY_TM table tracks approvals to payable time. This table is included in PeopleSoft Query, so you can run a query on this data. Any approvals to payable time have an action of *C (changed)* to indicated a change from the original status of the row created by Time Administration.

Note. The data archive scripts for Time and Labor are “one way” scripts. Data is only moved to the archive tables and never from the archive tables back to the master tables. Restoring data is not supported.

See Also

Enterprise PeopleTools PeopleBook: Data Management, Using PeopleSoft Data Archive Manager

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CHAPTER 4

Setting Up Basic Tables

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

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

Understanding Time and Labor Implementation

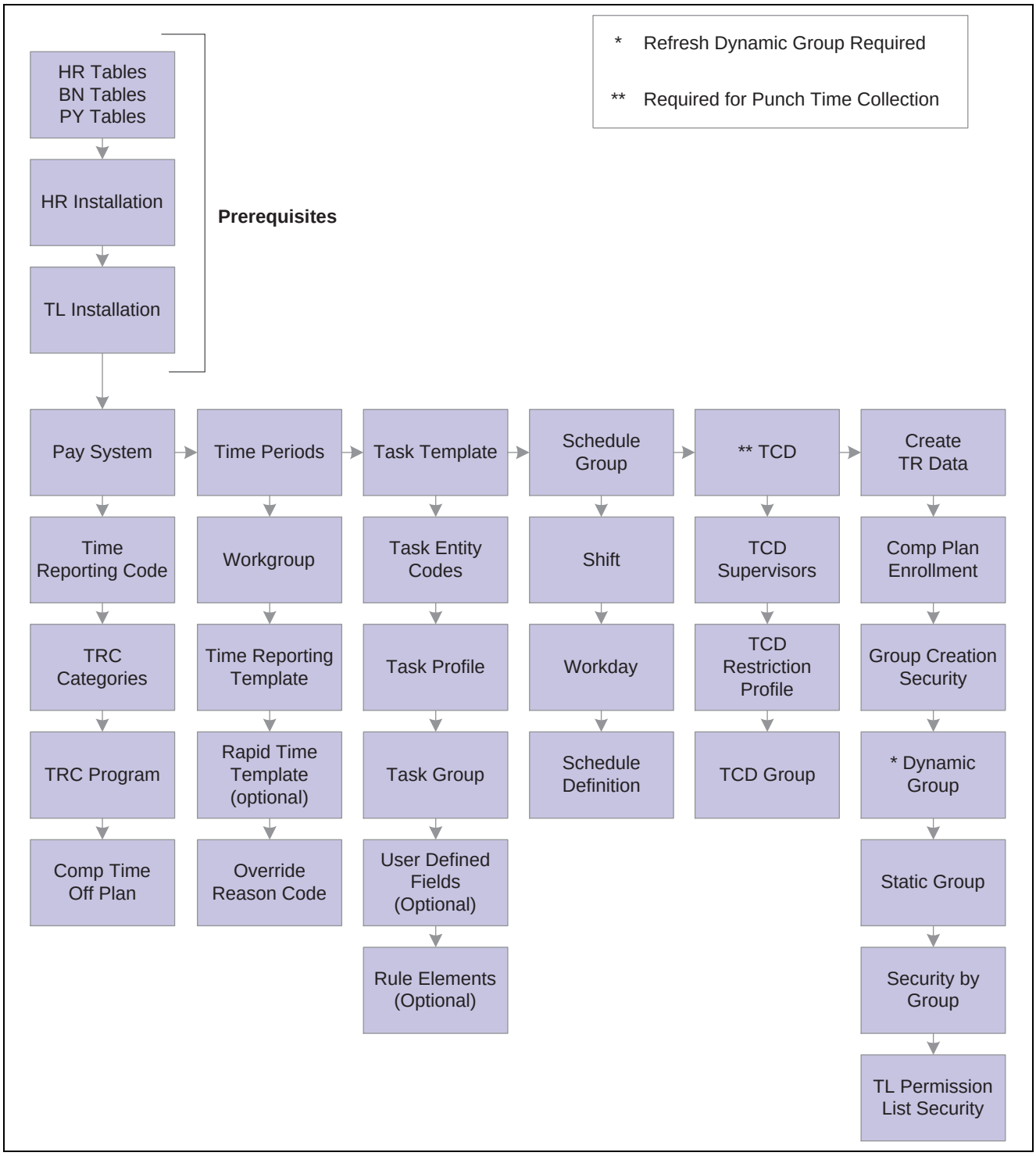
To implement Time and Labor, you must set up the following tables, processes, and features:

- Human Resource tables.
- Benefits tables.
- Time Zone Offsets table.
- Concurrent online processing.
- Time periods.
- Periods and period instances.
- Overtime limits.
- Calendars.
- Manager time calendar views.
- Compensatory time plans.
- Exceptions.
- PeopleSoft Application Engine sections.

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- Validation criteria.

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



Time and Labor Implementation Flow

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Human Resource Tables

The Time and Labor system uses 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 Time and Labor uses data extracted from Human Resources.

Business Units	Used for task reporting in Time and Labor and to resolve SetID for other fields.
SetIDs	Used to resolve values for reporting on job code, location, and department by using the business unit.
Company	Used for task reporting in Time and Labor.
Location	Used for task reporting in Time and Labor.
Department	Used for task reporting in Time and Labor.
Job Code	Used for task reporting in Time and Labor.
Pay Group	Used in distribution to define parameters for payment of payable time.
Comp Rate Code Table	Used for elapsed time reporting with time reporting codes (TRCs).
Holiday Schedule	Used for scheduling and rule processing.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS," Working with Business Units

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with System Data Regulation in HRMS," Working with TableSets

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Entering Company Information

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Establishing Locations

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Maintaining Departments

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Compensation, "Setting Up Administer Compensation"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Absence, "Setting Up Absence Data," Setting Up and Assigning Work and Holiday Schedules

Benefits Tables

Benefits tables store leave plans and accrual balances. 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 Time and Labor tables.

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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. If required by your organization, 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 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

Chapter 13, “Understanding the Batch Process in Time Administration,” Check Leave and Comp Time Balances, page 357

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.

Two circumstances can occur when punch time is reported across a daylight saving boundary. These relate to either the transition to or from daylight saving. When transitioning to daylight saving, clocks are advanced by a fixed amount at a fixed time. Transitioning back from daylight saving clocks are put back by a fixed amount at a fixed time.

Let’s look at an example:

- For the transition from daylight saving at 2:00AM, the clocks will be put back one hour. This means that an employee starting work at 11:00PM the previous day and finishing at 7:00AM on the day that daylight saving occurred, will have really worked for an elapsed period of 9 hours, not the 8 hours indicated by the clock times.
- For the transition to daylight saving at 2:00AM, the clocks will be put forward one hour. This means that an employee starting work at 11:00PM the previous day and finishing at 7:00AM on the day that daylight saving occurred, will have really worked for an elapsed period of 7 hours, not the 8 hours indicated by the clock times.

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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.

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, Servers.) You may also need to update the MAX API Aware field. The PeopleTools PeopleBook provides instructions for updating these fields.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Concurrent Online Processing

In addition to the Time Administration process, which runs in batch mode, 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	Timesheet page; Apply Rules button
Submit Time	Rapid Time page; Submit button
Resolve Exceptions	Manage Exceptions; Clean Up Exceptions button
Load Dates	Time and Labor Installation – Configurations page; Load Dates button

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Online Process	Page and Button or Field That Invokes Application Engine Processing
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 (navigation: PeopleTools, Utilities, Administration, PeopleTools Options), 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

Enterprise PeopleTools PeopleBook: Data Management

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine, Using Temporary Tables

Time Periods

You can define five types of periods in 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 discusses 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 Time and Labor system:

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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. These time periods can be associated on the Maintain Time Reporter Data page, or the Workgroup page to derive the time period display on the Timesheet page.

Determining Periods to Process

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.

Example: 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 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 Overtime Limits

For evaluating overtime balances, specify the time periods to track if time reporters are exceeding the amount of overtime that can be taken within a given period. Use the three time-reporting period types for tracking overtime balances.

Determining Current and Prior Period Time

Periods help the system distinguish between prior, current and future 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.

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See Also

Chapter 4, “Setting Up Basic Tables,” Establishing Time Periods, page 43

Chapter 12, “Creating Rules in Time Administration,” page 227

Chapter 12, “Creating Rules in Time Administration,” Defining Attendance Programs, page 298

Chapter 13, “Understanding the Batch Process in Time Administration,” page 315

Periods and Period Instances

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.

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.

   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 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.

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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

Chapter 4, "Setting Up Basic Tables," Establishing Time Periods, page 43

Chapter 4, "Setting Up Basic Tables," Building and Viewing Time Period Calendars, page 53

Planned Overtime Features

The basic overtime functionality of Time and Labor requires no special setup—employees can enter requests for overtime and managers can accept or deny requests. The following optional features require setup:

- Track overtime balances by period.
- Establish overtime limits that trigger a warning, when exceeded, on the manager's approval page.
- Base overtime limits on months of service.
- Enable workflow so that employees and managers are automatically notified when overtime requests are submitted, approved, or denied.

You assign overtime limits to workgroups, consequently, the same overtime limits apply to all employees in the same workgroup.

Time Period 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.

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- 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

Chapter 4, "Setting Up Basic Tables," Building and Viewing Time Period Calendars, page 53

Manager Time Calendar View Options

Time and Labor provides many options and combinations for viewing time management calendar information. The Calendar View Options page assists in determining what will be displayed on the time calendar pages. Use the Calendar View Options page to define the time reporting codes, using TRC Value lists, which will display on the manager time calendar views, as well as associate color coding to the TRC lists and other time related data.

Each TRC or time-related event defined on the Calendar View Options page appears on the time calendar pages when applicable. The time appears in the grid associated to the time reporter who reported the time, overlaying the color associated with the particular time event. The symbols are optional, both in defining them and also using them on the time calendar pages.

The Calendar View Options page is divided into two primary sections — the Reported/Payable Time section and the Scheduled Time and Exceptions section.

Compensatory Time Plans

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 Time and Labor uses the employee's leave balance records maintained in Human Resources, Base Benefits to determine leave availability, compensatory time is administered entirely within 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 post-rules processing.

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

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Exceptions

Exceptions are user- and system-defined warnings and errors to indicate a problem with a time reporter's time or a problem in the system. Exceptions are tied to the Time and Labor message sets in the message catalog. Defining 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).

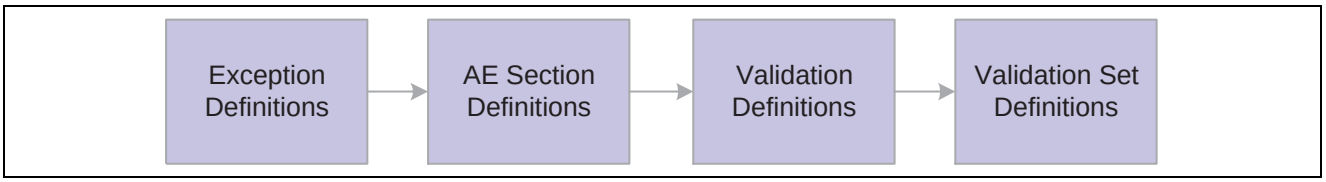
Almost all of the system-delivered exceptions have an exception severity of *High* and are defined as *Not Allowable.* These exceptions must be resolved before the Time Administration process creates payable time. You can change the severity and the allowable flag for system-delivered exceptions.

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 sets are ST_SUBMIT, ST_TA and 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. The ST_TA validation set represents all validations selected to run in Time Administration but not Submit Time. The ST_SUBMIT validation set represents all validations selected to run in Submit Time, but not in Time Administration. The ST_ALL validation set has all validations selected to run in both Submit Time and Time Administration. Each validation is configurable as to whether it is run in Submit Time, Time Administration, neither or both.

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 Time and Labor messages in the message catalog using PeopleTools.

See Also

Chapter 17, "Managing Time," Managing Exceptions, page 483

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

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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 subroutine, 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

Chapter 4, "Setting Up Basic Tables," Defining Exceptions, page 68

Enterprise PeopleTools PeopleBook: PeopleSoft 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.

See Also

Chapter 4, "Setting Up Basic Tables," Defining PeopleSoft Application Engine Sections, page 70

Setting Up System Defaults and Loading Dates

To set up system defaults and load dates, use the TL Installation (TL_INSTALL) component.

This section discusses:

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

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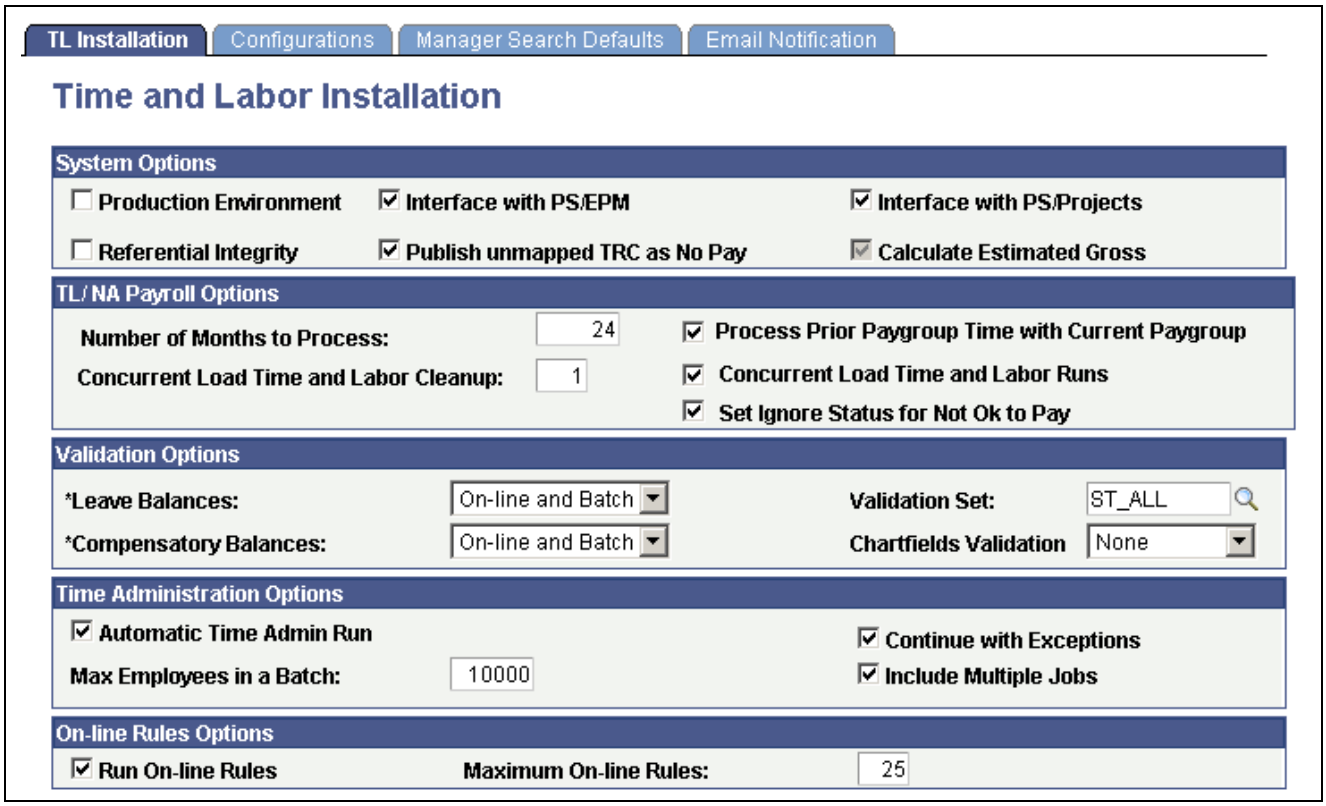
Pages Used to Set Up System Defaults and Load Dates

Page Name	Object Name	Navigation	Usage
Time and Labor Installation	TL_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Time and Labor Installation	Set up general system defaults and to activate specific features for your Time and Labor application.
Configurations	TL_INSTL_PUNCH	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations	Set up schedule total options, schedule resolution options, and punch pattern defaults for your Time and Labor application. **Note.** The navigation to Load Dates for GP and Absence Management Setup is HRMS, Product Related, Global Payroll and Absence Management, System Settings, Installation Settings.
Dates Table Load	TL_DATE_LOAD	Click the Load Dates link on the Configurations page.	Load dates into your Time and Labor system when you implement the system and each time you approach the end of the load period.
Manager Search Defaults	TL_INSTL_MSS_DFLT	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Manager Search Defaults	Set up manager selection criteria fields and options that will be used for returning employee lists for all Time and Labor manager self-service pages.
Email Notification	TL_INSTL_NOTIFY	Set Up HRMS, Install, Product and Country Specific, Time and Labor Installation, Email Notification	Set up manager and employee email notifications.

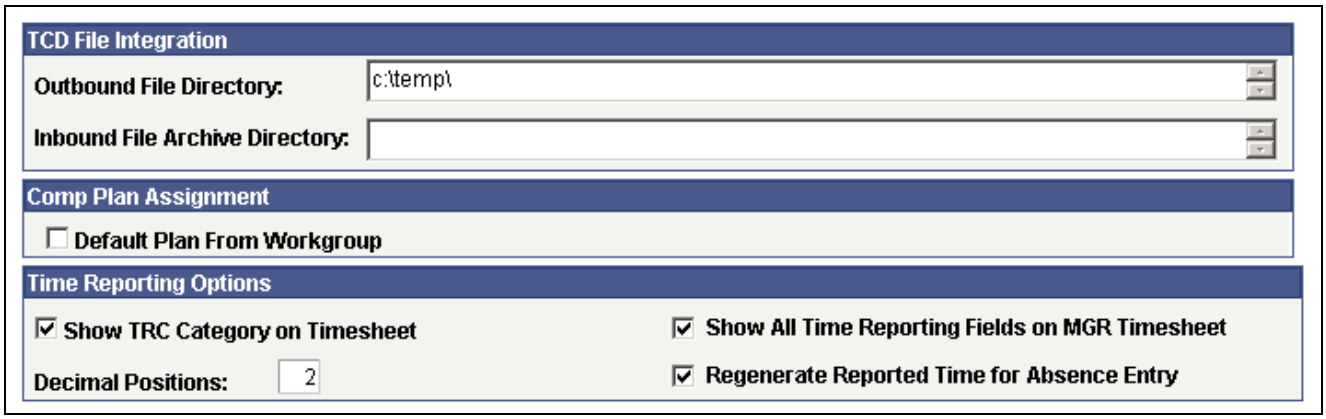
Setting Up System Defaults

Access the TL Installation page.

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TL Installation (page 1 of 2)



TL Installation (page 2 of 2)

System Options

Production Environment Select to indicate that the system is no longer in a testing environment. Use this check box to test the production functionality with the ability to change task templates and rules, and to understand exactly how the system responds in production.

The following table describes how certain processes function when the Production Environment check box is selected or cleared.

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Process	What Happens When the Production Environment Check Box Is Cleared or Selected
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.
Rule Objects	Cleared: All rule objects can be changed. Selected: No rule objects can be changed.

Interface with PS/EPM Select this field if you will interface Time and Labor with PeopleSoft Enterprise Performance Management.

Interface with PS/Projects Select this field if you will interface Time and Labor with Project Costing.

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.

The Referential Integrity Flag controls whether there are inserts in the RI_CNTRL_TBL, when a change occurs to an effective dated setup table. The rows in the RI_CNTRL_TBL are then read when the system runs the Time Administration process. This typically involves creation of exceptions for all reported time effected by the change. This flag has no dependency on the Production Environment Flag.

Publish unmapped TRC as No Pay Two processes use this check box so set the payable time status to No Pay (NP):

- The Time Administration process refers to this flag when generating payable time for TRCs or workgroups that do not require approval.

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- The payable time approval processes (online and batch) refers to this flag when setting the payable time status. If the TRC that is used to report time is not mapped to an earnings code in the pay system, or if a time reporter is not set up for payroll on the Maintain Time Reporter Data page, the payable time status is set to No Pay.

If selected, this option will create Time and Labor NoPay Actuals rows in PS Projects.

Calculate Estimated Gross Clear for the system to not calculate estimated gross for all instances of time. This check box 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 Time and Labor during the Labor Distribution process.

For example, you may want to bill estimated costs before the pay cycle. Use the estimated grosses to book the estimated 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.

TL/NA Payroll Options

The setting in this group box affect integration between Time and Labor and Payroll for North America.

See Chapter 18, "Integrating with Payroll Applications," Configuring Time and Labor for Use with Payroll for North America, page 507.

Number of Months to Process Enter the maximum number of months that the Load Time and Labor process will look back for prior adjustments. Enter the number of prior months of data to process during the loading. The number entered must not be negative, or else a error message would be generated. For example, if current date is 6/30/03 and the user entered 3 to the field, it will go back to 3/30/2003 on the Frozen Date field to load payable time to Payroll.

Process Prior Paygroup Time with Current Paygroup This check box controls how Payable Time is loaded into paysheets when a Prior Period Adjustments (PPA) exists and the employee had a pay group change.

For example, an employee transferred from pay group 1 to pay group 2 on September 1. When payroll is run on August 31, all Payable Time is loaded up to August 31 and the employee has one check in pay group 1. When payroll is run on September 30, all Payable Time in September is loaded and the employee has one check in pay group 2. Then, a prior period adjustment (PPA) occurs for the August pay period:

- If this check box is selected, then the PPA is loaded and paid in the September check. In this case the money is paid from the correct pay group and expenses are associated with the proper account.
- If this check box is not selected,, then the PPA is not loaded. The payroll clerk must create paysheets for the employee in pay group 1 to load the PPA and have it paid.

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Concurrent Load Time and Labor Runs

Select this check box if you run the Time and Labor Load processes concurrently (that is, multiple Load processes are run simultaneously). Clear this check box if the Time and Labor Load process is never run concurrently.

Concurrent Load Time and Labor Cleanup

If you select the Concurrent Load Time and Labor Runs check box, enter the number of previous Load runs for which you want to store runtime statistics and batch data in this field. For example, if you enter 3 in this field, the system keeps the data for the last three runs.

Set Ignore Status for Not Ok to Pay

This check box defines the payable time status code and reason codes that Time and Labor sets during the Distribution Dilution process when a no pay other earning or pay earning are processed:

- If this check box is selected, then Time and Labor sets the payable time status code to *Ignore (IG)* and the reason code to *Not Ok to Pay (NOP)* for any payable time for which the payline has the OK to Pay check box cleared.
- If this check box is not selected, then Time and Labor sets the payable time status code to *Rejected by Payroll (RP)* and the reason code to *Not Processed in Payroll (PNP)*.

The default setting for this option is selected.

See Chapter 14, "Understanding Payable Time," Payable Time Status and Reason Codes, page 389.

Validation Options

Leave Balances

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

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

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

Select *None* for the system not to validate leave balances.

If you change the validation option, all time processed prior to the change may need to be reevaluated as leave balances have been processed and exceptions created.

Compensatory Balances

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

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

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

Select *None* for the system not to validate compensatory balances.

If you change these values, all time processed prior to the change may need to be reevaluated as compensatory time has already been processed, and exceptions will be created.

Validation Set

Select the validation 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

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process. The system delivered validation sets are ST_ALL, ST_TA and ST_SUBMIT.

Chartfield Validation Select *Table Validation* for the system to validate Chartfields against the VALID_COMBO_TBL directly within HRMS.

Select *Sync Message* for the system to validate Chartfields by messaging the FMS database.

Select *None* for the system not to validate Chartfields.

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook*

Time Administration Options

Automatic Time Admin 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 automatically 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 a Batch (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*.

Note. This value can be as high as needed. If the value is high, fewer batches are created during the Time Administration process. If the database can handle the higher volume per batch, it is better to have a higher number. Performance will improve due to a reduction in TL_TA000410 loops during the Time Administration process.

See Chapter 13, "Understanding the Batch Process in Time Administration," page 315.

Use of Identity Column Select this check box to signify a field type in DB2 UNIX and DB2 OS390 that supports the generation of sequence numbers. This process is more efficient in generating unique sequence numbers for each row rather than using the sequence numbers that use procedural logic.

The Identity Column is a field type in the DB2 UNIX and DB2 OS390 databases that supports the generation of sequence numbers. This process is more efficient in generating unique sequence numbers for each row rather than using the sequence numbers that use procedural logic.

The TL_TA_RESEQX record is being used as the identity column table. The field SEQ_NBR1 on this record should be defined as an Identity column.

Note. This field appears on DB2 Unix and DB2 OS390 databases only. You need to create the Identity Column type table outside of the Application Designer.

See Understanding the Identity Column below.

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See Chapter 13, "Understanding the Batch Process in Time Administration," Step 15: Updating Payable Time, page 365.

Continue with Exceptions If exceptions are encountered while running the Time Administration process, continue to run the process and create payable time. Payable time is created only for the days when there are no high severity exceptions . If this check box is cleared, no payable time is created or/adjusted for the employee during the current Time Administration run.

Include Multiple Jobs If selected, the system processes all Empl_Rcd numbers for the EmplID if the TA status and ECD are ready for processing, regardless of what Empl_Rcd numbers are defined on the Time Administration run control page. If the Empl_Rcd numbers are in different workgroups, they are processed in different batches.

If not selected, the system processes all Empl_Rcd numbers listed on the Time Administration run control page or all Empl_Rcd numbers that are in the same workgroup as the Empl_Rcd numbers listed on the Time Administration run control page. Empl_Rcd numbers in the same workgroup are processed in the same batch.

On-line Rules Options

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 Timesheet page) that immediately applies the rules to a time reporter's time.

Note. On the Timesheet page, if the user clicks the Apply Rules button, the user is taken to the Payable Time Details page. If there is no payable time created, and if there are exceptions, the user is taken to the Exceptions page.

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.)

Comp Plan Assignment

Default Plan 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.

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- 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.

TCD File Integration

Outbound File Directory Enter the directory path for the TCD outbound flat files created by Integration Broker. 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.

Time Reporting Options

Show TRC Category on Timesheet Select to display TRC categories in the Reported Hours Summary on the Timesheet page

Show all Time Reporting Fields on MGR Timesheet Select to determine if all the time reporting fields appear on the Manager Timesheet, or only the fields that are *selected* on the Time Reporter's time reporting template.

Decimal Positions Display the entered number of decimals for the Timesheet pages.

Regenerate Reported Time for Absence Entry

Note. The default setting for this option is cleared.

If selected, when absence entries are reported or approved, the system regenerates reported time based on the employee's schedule (Reported Time source is SCH) so that the sum of reported absence and work time from other sources equals the number of scheduled hours for a day.

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This check box functions in conjunction with the Create Partial Work Hours check box on the Workgroup Defaults page in Time and Labor. If this check box is selected and the Create Partial Work Hours check box is cleared, the system uses full day absence logic when generating time. If the Create Partial Work Hours check box is selected and this check box is cleared, there is no impact on reported time.

See Chapter 5, "Establishing Workgroups," Setting Up Workgroups, page 77.

Note. The Learning Management field on the Products page (Set Up HRMS, Install, Installation Table), needs to be checked, in order for the user to view LM training data icons in Manage Schedules, Monthly Schedules and Calendars.

How to Determine the Correct Number of Temporary Table Instances for the TL_TA_RESEQX Record.

To determine the correct number of temporary table instances, you have two options:

- You validate the Instance Count value on the TL_TIMEADMIN Application engine program, Properties folder and add that to the number of Temp Table instances (Online) defined on the PeopleTools Options page, or
- Open the Application Designer and create the TL_TA_RESEQX table using the Build SQL Script option. This option creates the script to build the required number temporary table instances.

How to Create the Identity Column Table with Temporary Table Instances

If you are using the first option above of determining the number of temp table instances, then use the script below for building each temp table instance. For each temp table instance, replace the temp table number for "n" in the script. For PS_TMP_TS and PS_TMP_TSIDX, replace with your appropriate tablespace and index tablespace, respectively, for the table TL_TA_RESEQX.

This displays the Base table of the TL_TA_RESEQX record.

```
DROP TABLE PS_TL_TA_RESEQXn;
CREATE TABLE PS_TL_TA_RESEQXn (PROCESS_INSTANCE DECIMAL (10) NOT NULL,
   EMPLID CHAR (11) NOT NULL,
   EMPL_RCD SMALLINT NOT NULL,
   DUR DATE,
   SEQ_NBR DECIMAL (15) NOT NULL,
   SEQ_NBR1 DECIMAL (15) GENERATED ALWAYS
      AS IDENTITY
      (START WITH 1,
         INCREMENT BY 1,
         CACHE 72000,
         MINVALUE 1,
         MAXVALUE 10080000),
   TRC CHAR (5) NOT NULL,
   TL_QUANTITY DECIMAL (18, 6) NOT NULL) IN PS_TMP_TS INDEX IN PS_TMP_TSIDX
 NOT LOGGED INITIALLY;
COMMIT;
CREATE UNIQUE INDEX PS_TL_TA_RESEQXn ON PS_TL_TA_RESEQXn
 (PROCESS_INSTANCE,
   EMPLID,
```

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```
    EMPL_RCD,
    DUR,
    SEQ_NBR,
    SEQ_NBR1);
COMMIT;
```

If you are using the second option above, Building SQL Script to create the table then you would alter the generated script as follows:

Replace SEQ_NBR1 references with:

```
SEQ_NBR1 DECIMAL (15) GENERATED ALWAYS
      AS IDENTITY
      (START WITH 1,
         INCREMENT BY 1,
         CACHE 72000,
         MINVALUE 1,
         MAXVALUE 10080000)
```

This change ensures the creation of the SEQ_NBR1 field as an Identity column for TL_TA_RESEQX.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer, Administering Data, Creating Tables, Understanding the Create Table Process

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine, Using Temporary Tables

Chapter 12, “Creating Rules in Time Administration,” Online Processing Component, page 229

Chapter 12, “Creating Rules in Time Administration,” Adding Rules to a Rule Program, page 311

Chapter 17, “Managing Time,” Managing Exceptions, page 483

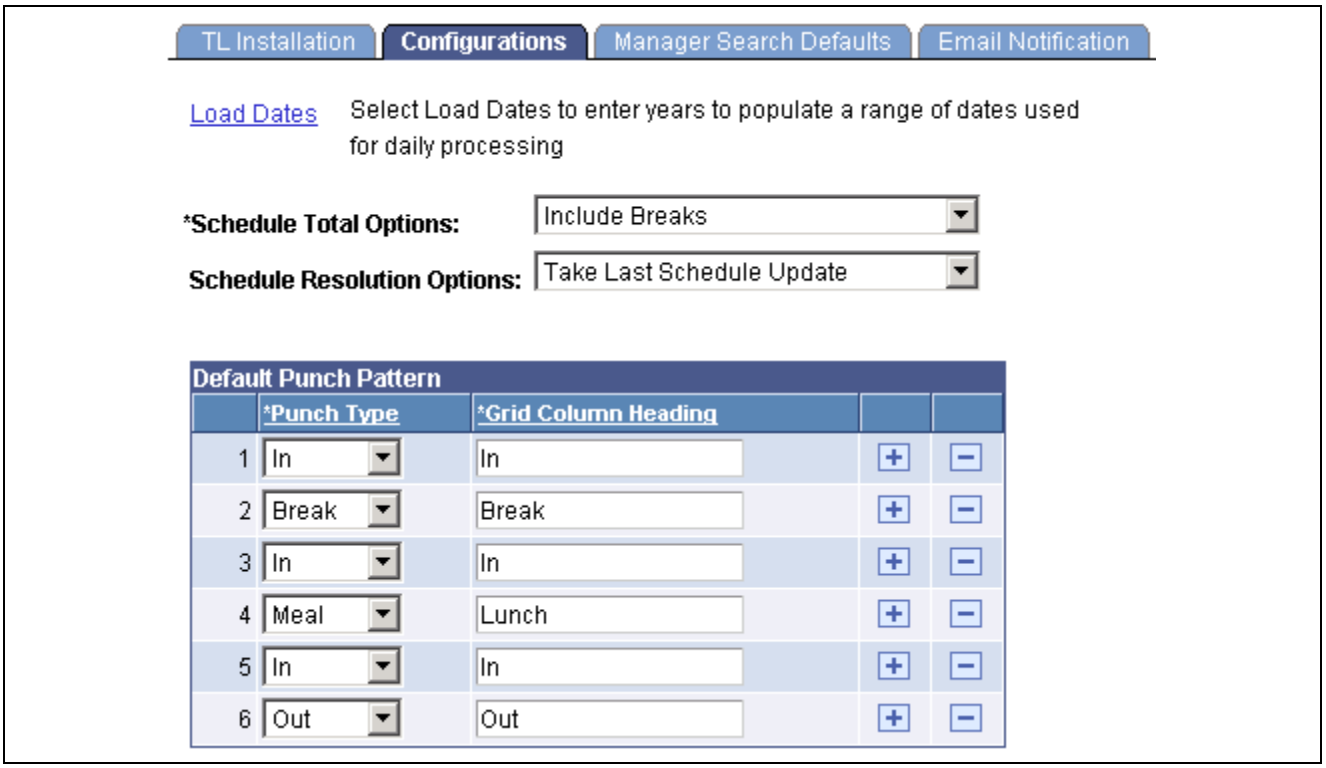
Chapter 5, “Establishing Workgroups,” page 75

Chapter 16, “Using Time Collection Devices,” page 425

Configurations

Access the Configurations page.

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Configurations page

Warning! Be careful to create a punch pattern that makes sense, without the same punch type in a row.

Load Dates

When you click this link, the system accesses the Dates Table Load page, where you can determine the range of dates to use for time-reporting and scheduling purposes. When loading the number of years for processing prior, current or future time, keep the years in sync with the years loaded in the Time Zone Offset table.

Schedule Total Options

Use this option to configure whether meal and/or break times are included in Scheduled Hours totals on schedule definitions, and shift definition and Manage Schedules. Valid values are *Exclude Meals and Breaks*, *Include Breaks*, *Include Breaks and Meals*, *Include Meals*. The default is *Exclude Meals and Breaks*.

Schedule Resolution Options

This field specifies how to resolve schedule changes. If the *Take Last Schedule Update* field value is selected, whether the last schedule update is from a workforce scheduling third-party system, or an online override, the system will take the last update to resolve the employee's schedule. If the *Take Online Override* field value is selected, the system will look for an online schedule override for resolving the schedule for the day, if an override exists. The system will not look for any changes from a third-party workforce scheduling system.

Default Punch Pattern

For the Time Reporting and Scheduling pages, set up the punch pattern you require to be defaulted. A total of ten punches can be entered. A label can also be specified for each punch type row. The default punch pattern set here also defaults to the Time Reporting Template page. On the Time Reporting Template page, you can override the Installation Table settings and establish

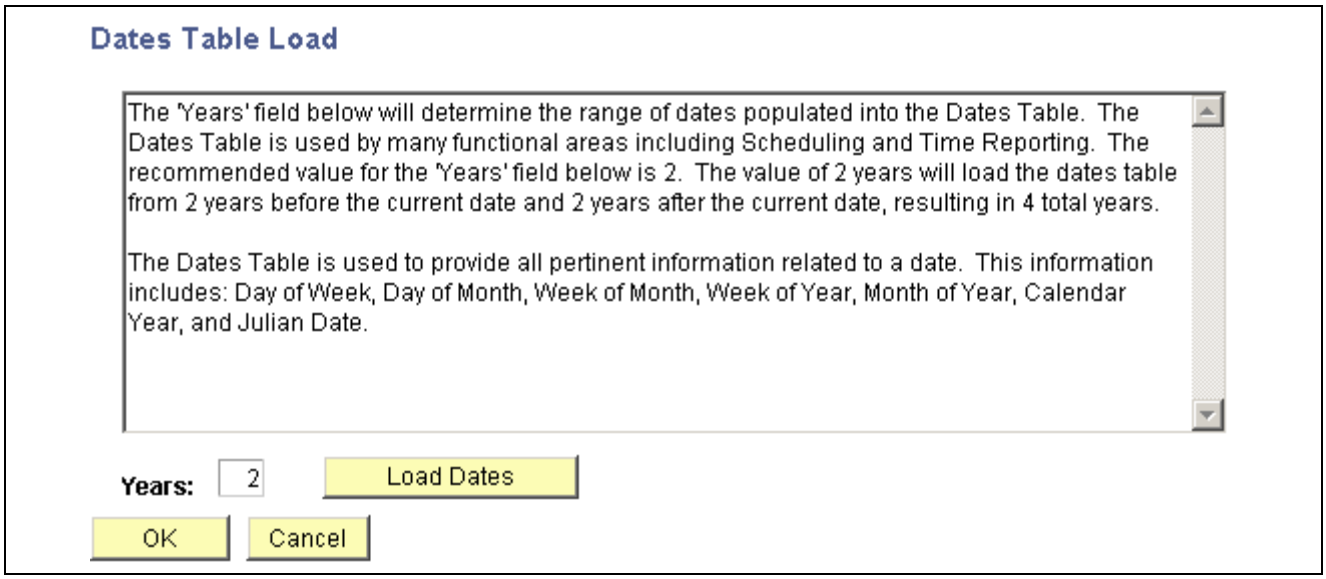
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a different punch pattern for specific groups of punch time reporters, rather than for all punch time reporters.

Important! Be sure not to create the same punch type successively, check the order of your punch types.

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.

Load Dates Click to load dates into the TL_DATES_TBL and create data in the TL_TA_OFFSET record.

Return Click to return to the Configurations page.

The Purpose of Load Dates

The Load Dates link populates years of dates into two tables.

The first table is TL_DATES_TBL, which populates years of dates for schedule resolution, and determines the date display while reporting time in the Time and Labor Timesheet. Global Payroll, Absence Management and Time and Labor uses the Schedule resolution process. Based on the number of years entered, the system populates that number of years prior to the current date, and after the current date.

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The second table populated is TL_DSTOFFSET for Daylight Savings, which is used in Time Administration for Time and Labor. The system uses this table to calculate the duration of the transition times that occur at the beginning of daylight savings or at the ending of daylight savings per time zone.

Finally, the table, PSTZOFFSET is populated from the Time Zone Query Offsets function from the Time Zones page, and is also used in Time and Labor's Time Administration process, as well as the Scheduling process. The system uses PSTZOFFSET to convert the base time zone into the reported or scheduled time zone. (Refer to Tools page for Time Zone Query Offsets.)

All three tables, TL_DATES_TBL, TL_DSTOFFSET and PSTZOFFSET should be in sync with each other, with regards to the years loaded.

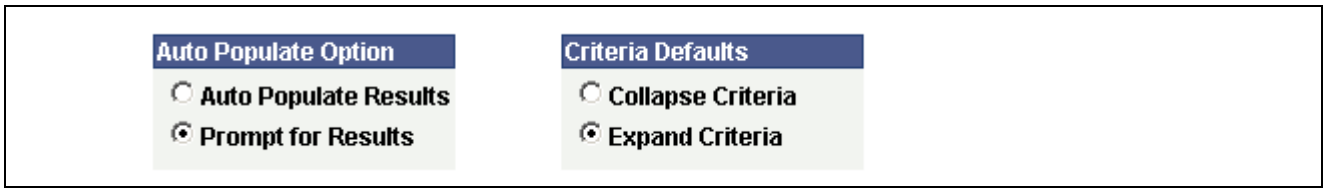
Manager Search Defaults

Access the Manager Search Defaults page.



Manager Search Defaults page (1 of 2)

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Manager Search Defaults page (2 of 2)

This page is used by managers and time administrators to set defaults that display on the Manager Search Options – Select Default Criteria and Options page. The Manager Search Options page is used for the various manager functions, to provide a consistent interface in which managers and administrators can easily identify, select and navigate through the pool of employees in whom they are interested.

You can establish preferred employee criteria and default values by configuring options on the Manager Search Defaults page. Employee lists can be pre-populated with a subset of a managers overall employee pool, criteria can be changed and data refreshed to expand or contract employee lists. When the employee pool is identified on pages that use the Manager Search page, the list persists throughout the application for easy navigation.

Manager Search Defaults

Include in Criteria Include this field in the Manager Selection Criteria. When the Manager Selection Criteria is displayed on the Manager Search Options page, this field can be used to filter employee lists.

Include in List Include this field in the employee list that is returned on the Manager Search Options page.

Auto Populate Option

AutoPopulate Results Auto populate the employee list when entering the page.

Prompt for Results Do not automatically populate the employee list, allowing the manager or administrator to review or change criteria values. A button is then selected and the employee list displayed.

Criteria Defaults

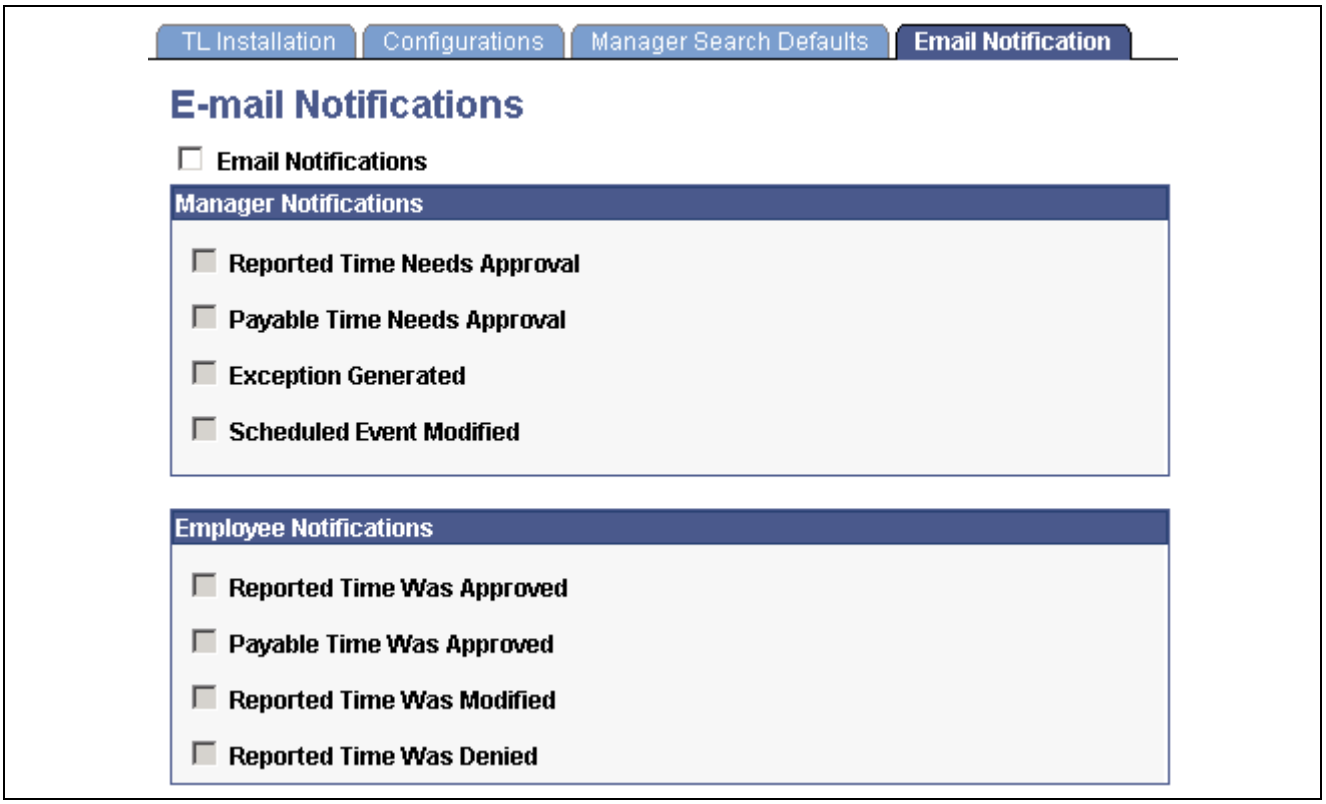
Collapse Criteria Collapse the Manager Search Criteria group box when entering the Manager Search Options page.

Expand Criteria Expand the Manager Search Criteria group box when entering the Manager Search Options page.

Email Notification

Access the Email Notification page.

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Email Notification page

This page is used to select whether email notifications will be used for managers and/or employees.

Email Notifications

Email Notifications Select this field to enable the manager and employee email notification fields to become selectable.

Manager Notifications

Reported Time Needs Approval Select this option to generate an email to a manager when an employee submits their reported time for approval.

Payable Time Needs Approval Select this option to generate an email to a manager when the Time Administration process has been run and payable time requires approval.

Exception Generated Select this option to generate an email to a manager if exceptions are generated when :

- The Time Administration process is run to create payable time.
- The Submit Time process is run for time that has been collected by different collection devices (PeopleSoft Mass Time Component, PeopleSoft Web Clock Component, TCD's, and Absences).

Schedule Event Modified Select this option to generate an email to a manager if an external schedule event is updated or deleted. (This will be triggered with updates from Enterprise Learning Management, if the user is utilizing this application with Time and Labor.)

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Note. In order for a batch process to insert a URL in an email notification to a manager, the following setup needs to be completed for the database local node. This determines the portal and node used for this process.

On the Portal page in the Nodes (IB_NODE) component, ensure that the Content URI Text and the Portal URI Text fields are populated as per the format displayed on the screen.

See *Enterprise PeopleTools PeopleBook: Internet Technology, Configuring the Portal Environment*

Employee Notifications

Reported Time Was Approved	Select this option to generate an email to an employee when a manager approves their reported time.
Payable Time Was Approved	Select this option to generate an email to an employee when a manager approves their payable time.
Reported Time Was Modified	Select this option to generate an email to an employee when a manager modifies their reported time.
Reported Time Was Denied	Select this option to generate an email to an employee when a manager denies their reported time.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode API Reference, Notification Classes

Enterprise PeopleTools PeopleBook: Workflow Technology, Using Notification Templates

Enterprise PeopleTools PeopleBook: Workflow Technology, Administering PeopleSoft Workflow, Setting Notification Options

Enterprise PeopleTools PeopleBook: Workflow Technology, Designing BlackBerry Email Responses, Activating the Send Notification Component

Enterprise PeopleTools PeopleBook: System and Server Administration , Setting Application Server Domain Parameters

Payroll System Options

To set up the payroll options, use the Pay System (TL_PAYSYS_PNLGRP) component.

This section discusses:

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

   The delivered system contains both Global Payroll and Payroll for North America.
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.

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Page Used to Establish Payroll System Options

Page Name	Object Name	Navigation	Usage
Pay System	TL_PAYSYS_PNL	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Pay System, Pay System	Establish the payroll system to use and to choose labor distribution and labor dilution.

Establishing Payroll System Options

Access the Pay System page.



Pay System page

Labor Distribution Used Clear to disable Time and Labor's labor distribution. The check box is selected by default. When selected, payroll expense is distributed to all applicable 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 Time and Labor's labor dilution feature. The check box 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

Chapter 18, "Integrating with Payroll Applications," page 501

Establishing Time Periods

To set up time periods, use the Daily Time Period (TL_FIXED_DAY_PNLGR), Weekly (TL_FIXED_WEEK_PNLG), Monthly (TL_FIXED_MNTH_PNLG), Complex (TL_COMPLEX_PNLGRP), and Repeating (TL_REPEAT_PNLGRP) components.

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This section discusses 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	Set Up HRMS, Product Related, Time and Labor, Time Periods, Daily, Daily Time Period	Establish a fixed day-type period when building time period calendars.
Weekly Time Period	TL_FIXED_WEEK_PNL	Set Up HRMS, Product Related, Time and Labor, Time Periods, Weekly, Weekly Time Period	Establish weekly periods of time when building time period calendars.
Monthly Time Period	TL_FIXED_MNTH_PNL	Set Up HRMS, Product Related, Time and Labor, Time Periods, Monthly, Monthly Time Period	Establish monthly periods of time when building a time period calendar.
Complex Time Period	TL_COMPLEX_PNL	Set Up HRMS, Product Related, Time and Labor, Time Periods, Complex, Complex Time Period	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	Set Up HRMS, Product Related, Time and Labor, Time Periods, Repeating, Repeating Time Period	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

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Days 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	January 24, 2006	January 25, 2006
2	January 24, 2006	January 26, 2006

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.

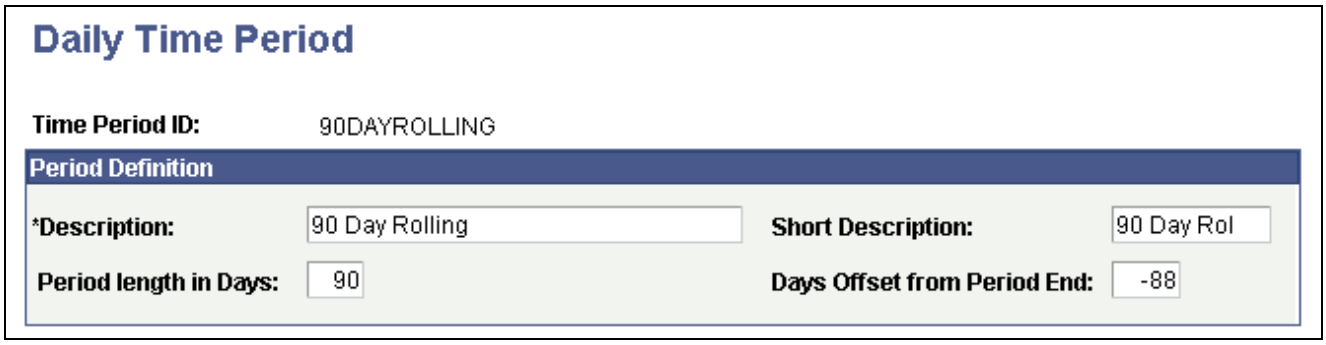
To avoid creating a period with an offset equal to or greater than the period length, observe the following rule: *The maximum number of negative offset days cannot exceed the period length minus two.* The following table illustrates the results of using this rule. Note that if the offset is *−6,* it 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	January 3 - January 9, 2006	January 3 - January 9, 2006
−5	January 3 - January 9, 2006	January 4 – January 10, 2006
−4	January 3 - January 9, 2006	January 5 – January 11, 2006
−3	January 3 - January 9, 2006	January 6 – January 12, 2006

Example: Creating a Rolling Period with Negative Offset Days

The following page illustrates how to define the offset to create a 90 day rolling period.

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Daily Time Period page – rolling period example

To create a rolling period, the negative offset (the value of the Start Offset from Period End field) should be two less than the length of the rolling period, which in this example would be 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 January 1, 2006 to March 30, 2006, the system would subtract 89 days, beginning from March 29, which would start the next period on January 1. To be a rolling period, the next instance of time should begin one day after the first period instance.

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 be 15 days.

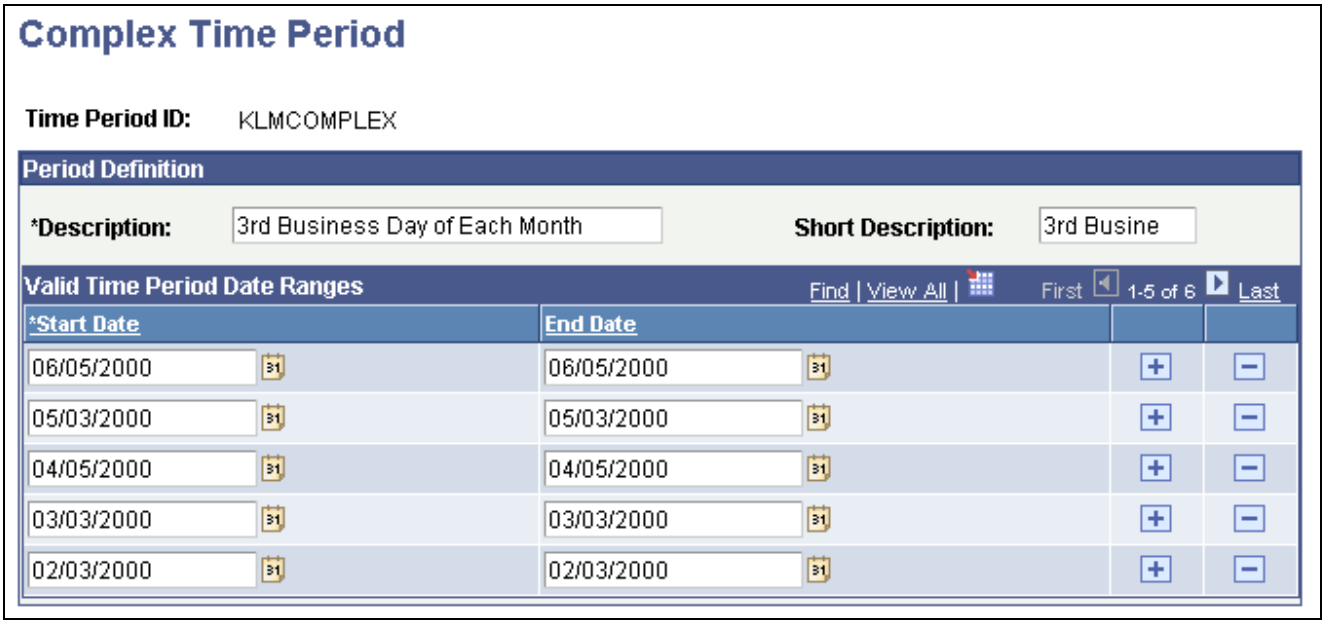
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Semi-year	Select semi-year for your period length to be 6 months.
User Defined	If you select User Defined, the Period Length in Months field becomes available. Enter the length of the period in months. The maximum number of months you can enter is 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

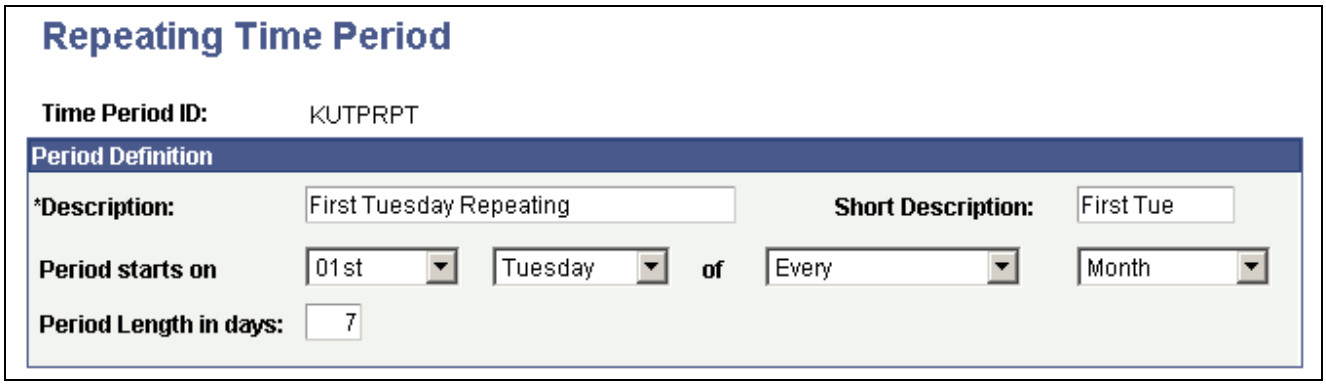
Enter a start and end date for the time period.

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.

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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.

Setting Up Planned Overtime Features

To set up planned overtime, use the Overtime Limit (TL_OT_SETUP) and the Workgroup (TL_WKG_MAIN_PNLGRP) components. Use the TL_WKG_MAIN_PNLGRP component interface to load data into the tables for this component.

This section discusses optional features of the overtime request transactions and explains how to:

- Define overtime limits and track overtime balances.
- View the TRCs in a Value List.
- Assign overtime limits to workgroups.
- Set up workflow.

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See Also

Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," Managing Overtime Requests, page 616

Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," page 585

Prerequisites

To establish overtime limits or maintain overtime balances by period, you create *value lists* to identify the sets of Time Reporting Codes (TRCs) to which the limits or balances apply. For example, to limit the combined number of overtime hours permitted for TRC1 and TRC2, you create a value list that includes these two TRCs.

Use the Value List page to create one or more value lists for your overtime TRCs.

Important! Because you assign overtime limits to workgroup, be sure that the TRCs in your value lists are also included in the workgroup's TRC program.

See Also

Chapter 12, "Creating Rules in Time Administration," Creating Value Lists, page 240

Chapter 5, "Establishing Workgroups," Understanding Workgroups, page 75

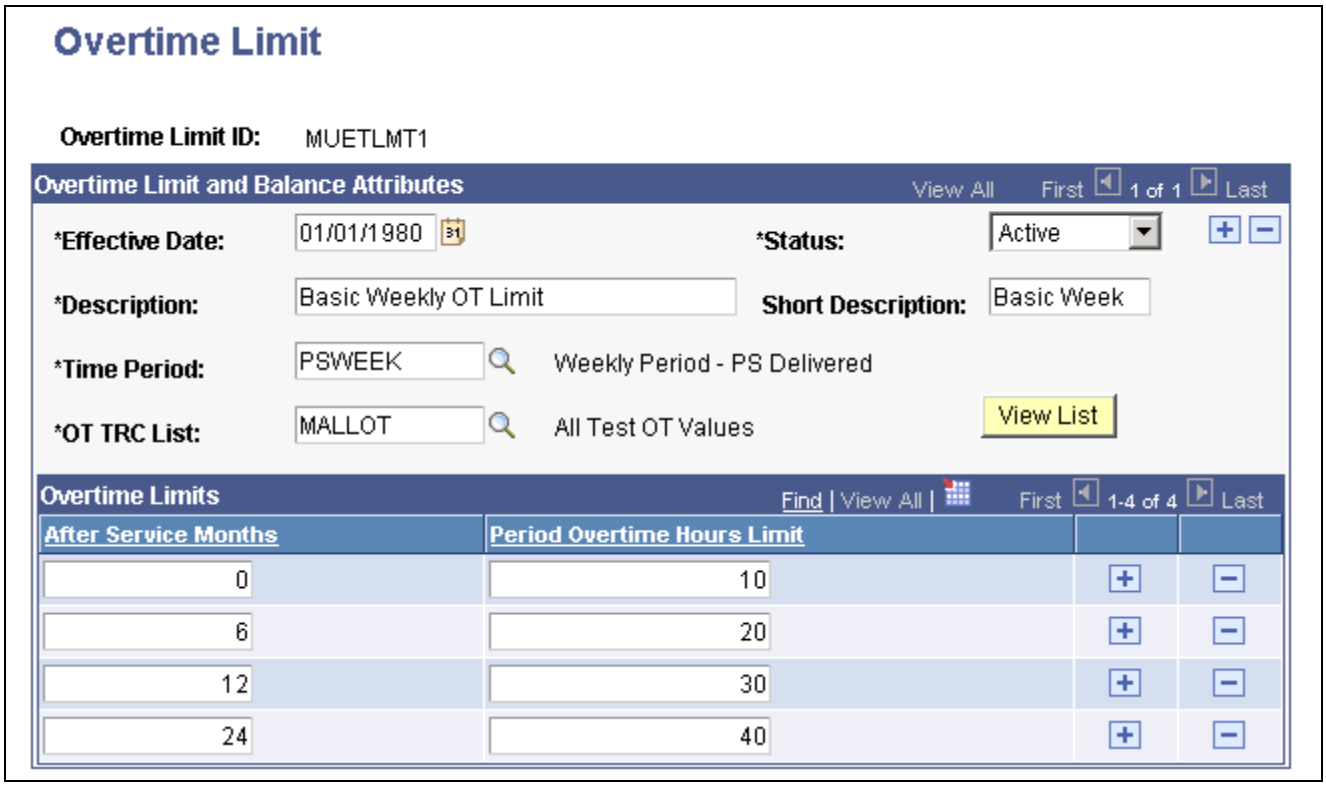
Pages Used to Set Up Overtime Features

Page Name	Object Name	Navigation	Usage
Overtime Limit	TL_OT_SETUP	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Overtime Limit, Overtime Limit	Define overtime limits for a set of TRCs. Also identify the TRCs for which you want to track overtime balances. You must define the value list that includes the TRCs first.
Overtime TRC Value List	TL_OT_VAL_LIST_SEC	Click View List on the Overtime Limit page.	Displays the Time Reports Codes (TRCs) that make up a selected value list.
Workgroup	TL_WRKGRP_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Workgroup, Workgroup	Assign an overtime limit definition to a workgroup.

Creating Overtime Limits

Access the Overtime Limit page.

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Overtime Limit page

Overtime Limit ID Displays the unique ID for the overtime limit definition. IDs can contain up to eight alphanumeric characters.

Overtime Limit and Balance Attributes

Complete the following fields to designate the TRCs for which you want to set overtime limits and/or track overtime balances.

Status Select the status of the Overtime Limit ID: *Active* or *Inactive*.

Note. You cannot inactivate an overtime limit definition that is associated with an active workgroup. To inactivate the limit definition, first remove it from the Workgroup page. (You can query the Workgroup table to find out which workgroups are associated with an overtime limit definition).

Time Period Select the time period for managing overtime limits and balances. For example, if you select monthly, the system tracks the number of overtime hours for the month. If you also set a limit of 10 hours, this limit applies to each month.

Repeating and complex time periods are not allowed.

See Chapter 4, "Setting Up Basic Tables," Establishing Time Periods, page 43.

OT TRC List Select the value list that includes the overtime TRCs for which you are defining limits and/or tracking balances.

View List Click to view the list of TRCs that are members of the value list selected in the OT TRC List field.

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Overtime Limits

Define the overtime limits in this group box. If you base overtime limits on months of service, add a row for each term of service that has a different overtime limit.

After Service Months To base overtime limits on an employee's number of months of service, enter the number of months here. Enter whole numbers only. If you do not want to link overtime limits to months of service, leave the default value of 0 (zero) in this field.

Note. The system refers to the employee's Service Date on the Employment record to determine months of service. Because service dates can be defined for employees only, the system cannot calculate overtime balances or apply overtime limits for non-employees.

Period Overtime Hours Limit Enter the maximum number of overtime hours that employees are allowed to work during the time period defined in the Time Period field. If you entered a non-zero value in the After Service Months field, the limit you enter here represents the number of overtime hours permitted for employees who have met the service requirement. If you entered zero in the After Service Months field, the limit you enter here applies to all employees.

Example 1: Defining Overtime Limits without Service Dates

Assume that employees can work a maximum of 25 hours of overtime each month. The values you enter are as follows:

After Service Months	Period Overtime Hours Limit
0	25

Example 2: Defining Overtime Limits with Service Dates

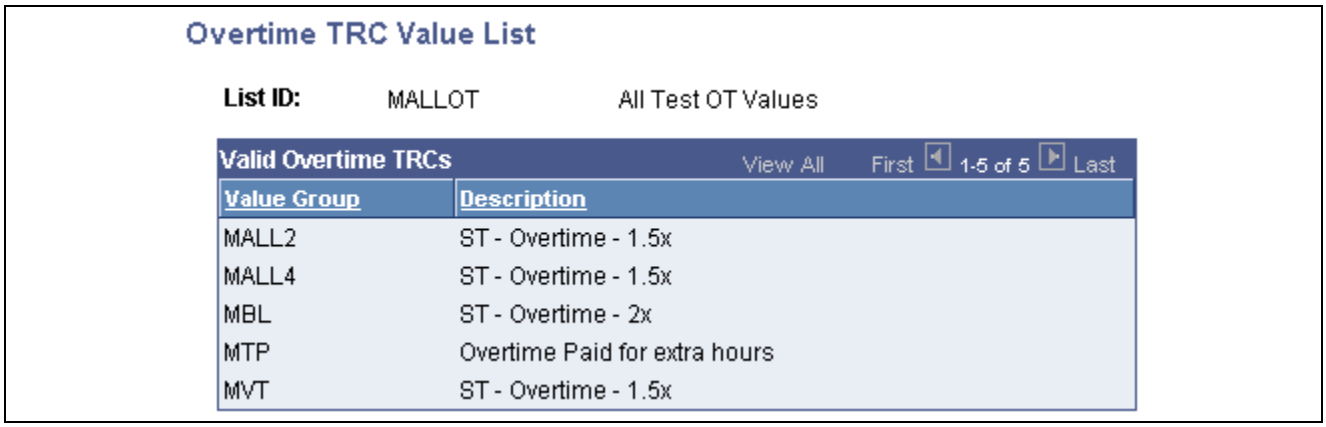
Assume that employees must complete 12 months of service before working any overtime and after that can work a maximum of 20 hours of overtime each month. After 24 months of service, employees can work a maximum of 50 hours of overtime each month. In this case, the values that you enter are as follows:

After Service Months	Period Overtime Hours Limit
12	20
24	50

Viewing the TRCs in a Value List

Access the Overtime TRC Value List page.

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Overtime TRC Value List page

Value Group Displays the names of TRCs within the value list selected in the OT TRC List field on the Overtime Limit page.

Assigning Overtime Limits to Workgroups

Access the Workgroup page for the workgroup that you want to assign overtime limits to.

In the Overtime Limit ID field (within the Compensation Controls group box), select the ID for the overtime limit definition that applies to the members of the workgroup.

Note. Overtime limit assignments are effective-dated. A workgroup can have more than one effective-dated row of overtime limits.

See Also

Chapter 5, "Establishing Workgroups," page 75

Enabling Workflow

Time and Labor uses workflow functions, such as approvals workflow. Approvals workflow takes a request entered by an employee and routes it to an approver to accept or deny. If the request is denied, the system notes that the request was denied. Employees and managers can view the approval status of some requests with self-service transactions.

Note. For Request Overtime, the employee's manager is the only person who is required to approve overtime requests.

To enable workflow:

1. Ensure that the appropriate roles are associated with user profiles.

   Roles define what the user can and can't access in the system. Use the Roles page in the User Profiles component to review the roles and update as necessary. Manager profiles should include roles for Manager and Worklist User. Employee profiles should include an Employee role. Instructions for using the Roles page are provided in the *Enterprise PeopleTools PeopleBook: Security Administration*.

2. Specify which types of routings each role user can receive.

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Use the Workflow page in the User Profiles component to specify where the system can deliver work items: to a worklist or an email mailbox. For Time and Labor, worklist, email, or both are appropriate for managers; email is appropriate for employees. Instructions for using the Workflow page are provided in the *Enterprise PeopleTools PeopleBook: Security Administration*.

3. Define the rules for workflow notifications by SetID.

   Use the System Workflow Rules page to define how users are to receive notifications: email, worklist, both, no notification, or user-defined preference. The system can notify employees by email when a request is submitted, approved, or denied; it can notify managers by worklist, email, or both when requests are submitted for approval.

   Procedures are provided in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook* and the *Enterprise PeopleTools PeopleBook: Workflow Technology*.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Defining Rules for Workflow Notifications.

4. Activate workflow for the HRMS system, if not already activated.

   Use the Worklist System Defaults page and the Workflow User Preferences page.

   Procedures are provided in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Using Workflow with Self-Service Transactions.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Building and Viewing Time Period Calendars

To set up time and view period calendars, use the Build Time Period Calendar (TL_RCTRL_CAL_PG) and the View Time Period Calendar (TL_CALND_VW_PNLGRP) components.

This section discusses:

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

Understanding 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.

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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

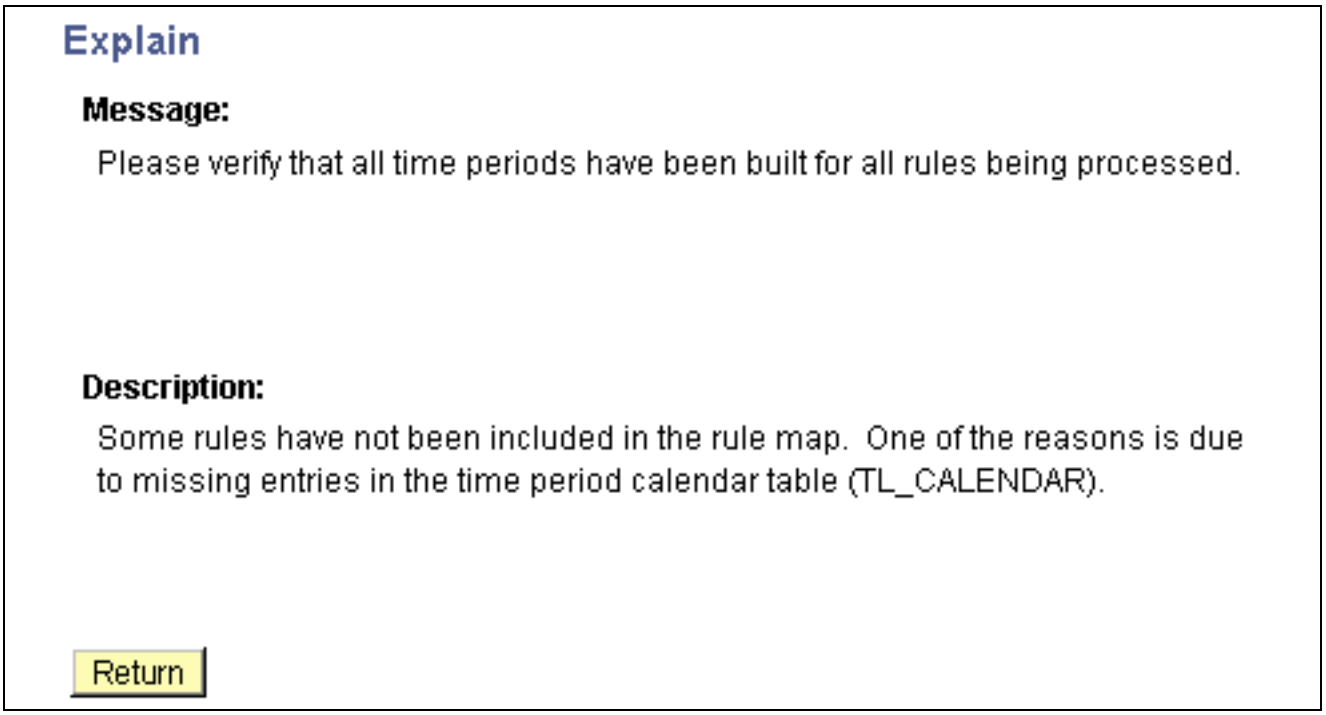
Assume that you have calendars for the following periods:

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 January 7, 2006 but starts December 15, 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:

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Missing entry in the time period calendar table 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 described 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.

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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: January 1, 2000 − December 31, 2000

New Calendar Dates: December 15, 1999 − December 31, 2000

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

New Calendar Dates: January 1, 2000 − February 15, 2001

The start dates are identical; however, the end dates are different. The new end date is February 15, 2001; the old end date is December 31, 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: January 1, 2000 − December 31, 2000

New Calendar Dates: December 15, 1999 − February 15, 2001

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

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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.

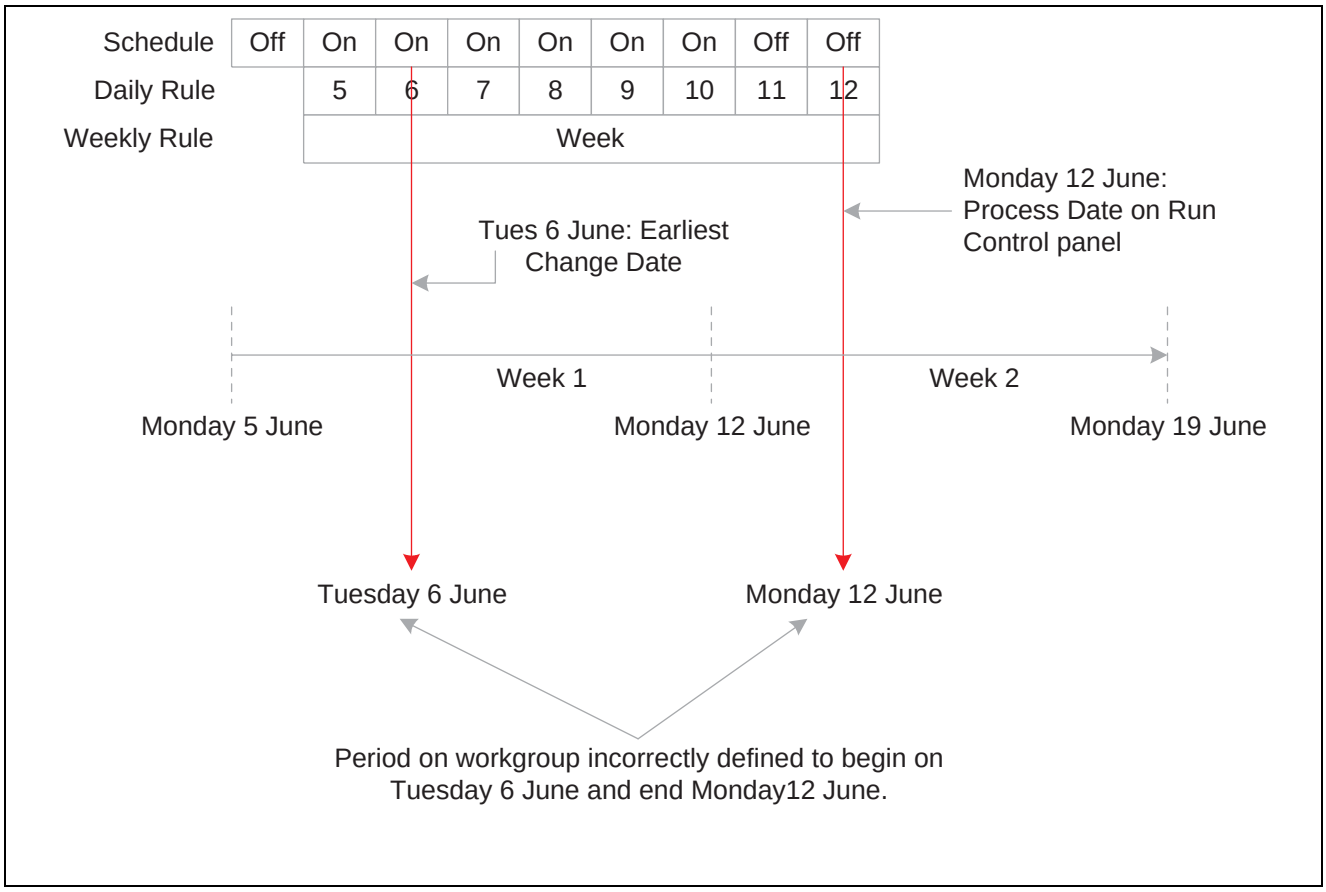
Payable time is created through the interaction between the schedule calendar, time reporting periods, and rule periods. Compare the work schedule calendar to the workgroup and rule periods to ensure that the start and end dates of these periods are correctly aligned. If the periods are incorrect, you 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, June 5 and an end date of Sunday, June 11. By mistake, you defined a period ID for the workgroup that specifies a begin date of Tuesday, June 6 and end date of Monday, June 12.
- 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, June 5 and ends Sunday, June 11. The rule period is consequently out of synch with the period ID on the workgroup.
- The earliest change date is Tuesday, June 6.

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Defining the interaction of time reporting periods, rule periods and calendar periods

In this example the Time Administration process passes all the dates from June 6 to 12 —the current workgroup period—to Payable Time. Assuming that the weekly rule in our example generates new time data for June 5—a date just outside the current workgroup period—we end up with a Payable Time date range of June 5 to 12. By contrast, the correct period ID for the workgroup would have produced a Payable Time date range of Monday June 5 to Sunday June 11 . 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

Chapter 13, “Understanding the Batch Process in Time Administration,” page 315

Enterprise PeopleTools PeopleBook: Process Scheduler

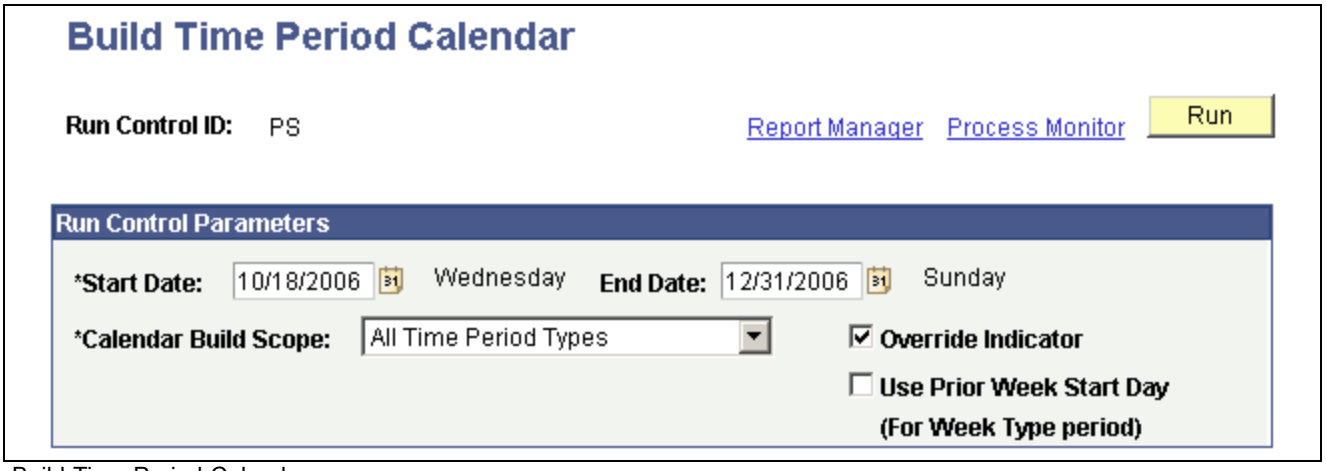
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Pages Used to Build and View Time Period Calendars

Page Name	Object Name	Navigation	Usage
Build Time Period Calendar	TL_RCTRL_CAL_PNL	Set Up HRMS, Product Related, Time and Labor, Time Periods, Build Time Period Calendar, Build Time Period Calendar	Create instances of a time and labor calendar that will include each of your period start and end dates.
View Time Period Calendar	TL_CALENDAR_VW_PNL	Set Up HRMS, Product Related, Time and Labor, Time Periods, View Time Period Calendar, View Time Period Calendar	View the time period instances for each calendar.

Creating Instances of a Time and Labor Time Period 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.

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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.

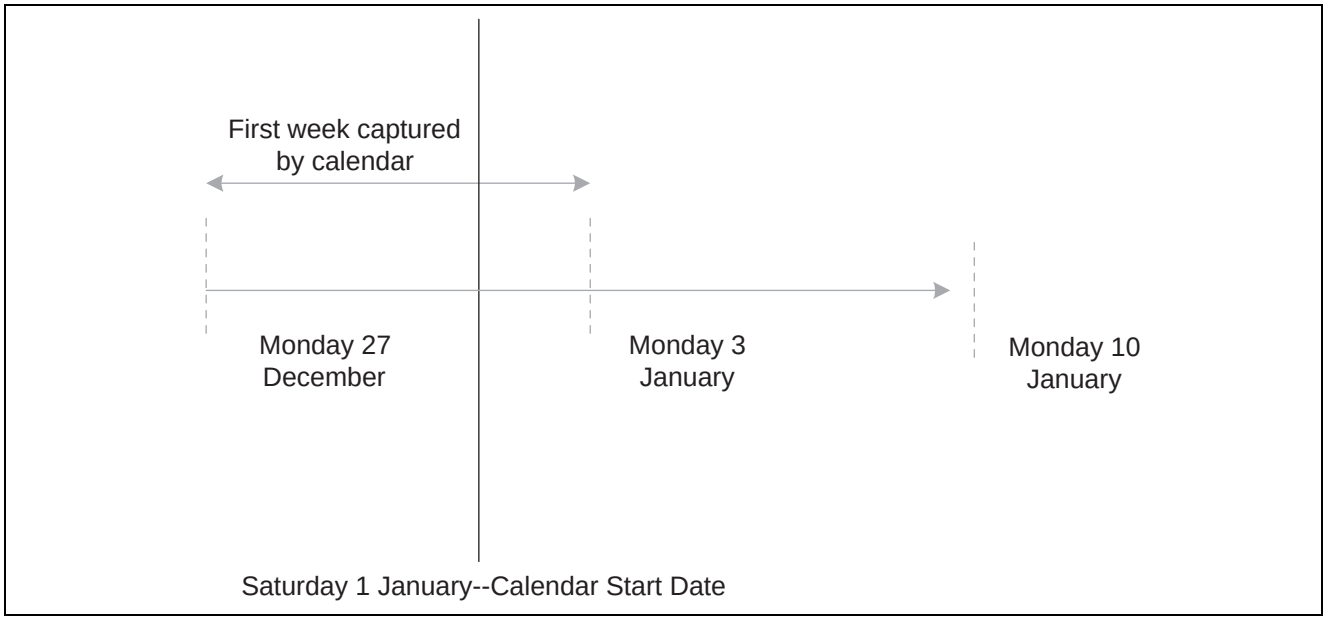
Override Indicator

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 January 1, 2000. You've defined a weekly period that begins on Monday. January 1 falls on a Saturday, which means that the week overlaps the start date. This is illustrated below:



Using the prior week start day

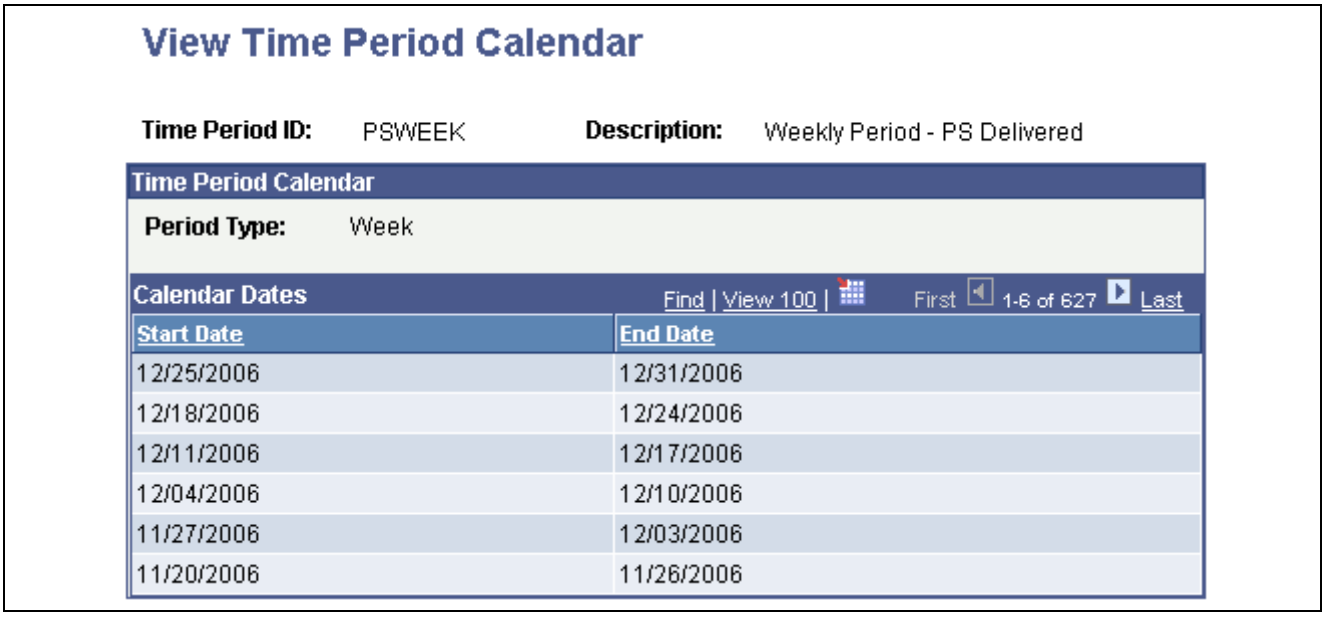
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In the diagram above, the first weekly period captured by the calendar begins Monday December 27 —4 days before the calendar start date. In this situation, specify whether the calendar should begin on the Monday before the specified calendar start 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 December 27 in this example). If the Use Prior Week Start Day check box is cleared, then the calendar begins on the following Monday (January 3 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.

Setting Up Manager Time Calendar View Options

To set up manager time calendar views, use the Calendar View Options (TL_WV_OPTIONS) component.

This section provides an overview of manager calendar views and describes how to:

- Set up calendar viewing options.
- Preview the time calendar legend.

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Understanding Manager Time Calendar Views

Manager calendar views provide assistance to managers in allocating workforce resources. The self-service manager calendar view pages enable the manager to view a group of employees and all their time-related information for a specific timeframe on one page. This calendar view offers up-to-the-minute information on group schedules and time related events. The information displayed on the manager calendar view depends on the selections made while setting up the calendar viewing options. The calendar viewing option setup applies to all calendar view pages. In designing your calendar views you decide what information managers can choose to display for work days and off days as well as training, absences, overtime and holidays. You also determine which TRCs will be associated with the calendar views.

Managers use the time calendars to determine how resources are currently allocated and how to adjust resources for maximum productivity and profitability. Managers can respond quickly to changing scheduling needs and employee requests. Managers can also view prior periods to assess past scheduling effectiveness and resource allocation.

Each calendar page displays the selected information on a grid. This information is viewable on a daily, weekly or monthly calendar schedule and provides drill down capability to view lower level details. The time calendar page displays the selected information using predetermined color codes to differentiate the data.

Prerequisites

Before setting up Time and Labor manager calendar viewing options, you must define time reporting codes and create TRC Value lists. Employee group definitions must also be defined to enable calendar viewing.

See Also

Chapter 6, “Establishing Time Reporting Codes,” page 101

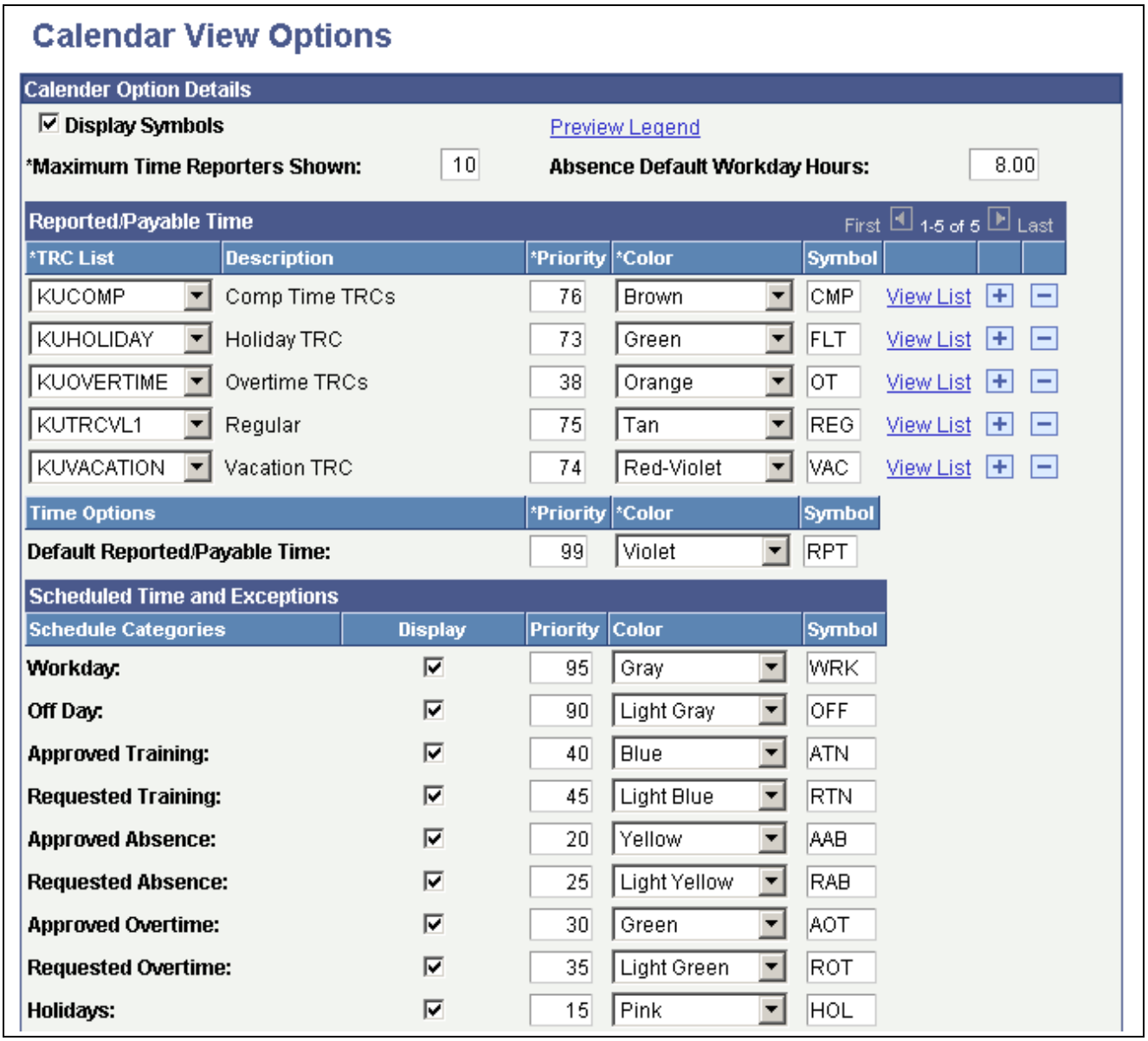
Pages Used to Set Up Calendar Viewing Options

Page Name	Object Name	Navigation	Usage
Calendar View Options	TL_WV_OPTIONS	Set Up HRMS, Product Related, Time and Labor, Calendar View Options, Calendar View Options	Define viewing options for calendars.
Preview Legend	TL_WV_LEGEND_SEC	Click Preview Legend on the Calendar View Options page.	View a sample of the legend that will appear at the bottom of the calendar viewing pages as defined by the current selected colors and symbols.
TRC List	TL_VALUE_LIST_SEC	Click View List on the Calendar View Options page.	View a list of the TRC value groups and descriptions contained in the selected TRC list.

Defining Time Calendar View Options

Access the Calendar View Options page.

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Calendar View Options page

Display Symbols Select the Display Symbols to assign symbols to TRCs and time events. If selected, the symbols overlay the color for the associated TRC or time event on the calendar. This option is selected by default. Clear the check box to deselect this option.

Note. The time calendar pages allow the option of displaying symbols when this option is selected. If this box is not selected on the Calendar View Options setup page, users will not have this option on the time calendar viewing pages.

Preview Legend Click to display an explanatory list of the colors and symbols that have been selected to display on the time calendar pages. While building the calendar viewing options, click this link to view the legend with the colors and symbols selected at the time.

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Maximum Time Reporters Shown

Define the maximum number of time reporters to display on screen.

Note. The maximum number of time reporters shown cannot exceed fifteen.

Absence Default Workday Hours

Define the number of hours to display for a requested or approved absence when:

- no hours have been reported.
- the requested/approved day is an "Off" day on the schedule.
- the employee doesn't have a schedule.

The system displays this number if one or more of the reasons above are valid. The system displays half the number of the defined hours if the requested/approved absence is for a half day.

Reported/Payable Time

TRC List

Designate which TRCs will be displayed on the time calendar pages. TRC value lists are set up in Time and Labor and designated a unique ID. Click View List to see a list of the TRCs in the selected list.

Note. A TRC can be included in more than one TRC List. If a TRC appears in two or more TRC lists, the list with the higher priority will display on the calendar. View the TRC lists before setting priority codes to avoid possible duplication of TRCs and minimize potential confusion while viewing calendar pages. TRC values are defined in the Time and Labor setup tables.

Important! A maximum of five TRC lists can be specified. The system will not allow you to save the page with more than five TRC lists designated.

Priority

Enter a number from 1 to 99 in this field. Priority definitions enable the system to decide which information is the most important to show. The priorities assigned to the TRCs and time event options determine which color to display when more than one type of time related data is in effect for the same period. The color with the highest priority will be used to represent all of the time for the particular period. All assigned priorities need to be unique.

Color

The Calendar View Options page enables you to associate colors with TRCs and time events, such as holidays. Use the drop-down menu to view the list of sixteen color choices. This design provides easier viewing of the calendar pages. The colors and associated elements will appear on the legend at the bottom of each calendar page.

Symbol

Define symbols to designate different TRCs and time events. Use up to three characters for each symbol. If Display Symbols is selected, these symbols appear on the calendar along with the hours to show different types of reported time and are explained through the legend on the calendar viewing pages.

View List

Click to view the TRCs contained in the selected TRC list.

Default Reported/Payable Time

Designate the priority, color and symbol (if used) to either the payable time reported by a time reporter or the time that is defaulted from the schedule.

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Scheduled Time and Exceptions

In addition to TRCs and default reported time, select other time-related items for calendar viewing. For example, if requested overtime and exceptions are important, you can prioritize them so that they display on the calendar pages, when present.

Select the priority, color, and symbol that the system is to apply to the following types of calendar display options.

Workday — A workday is any regularly scheduled day for which time events should be reported. When Show Schedules is selected on the Time Calendar pages, *Workday* and *Off Day* will be displayed.

Off Day — Days designated as non-workdays. Off days do not include requested/approved absences or holidays.

Approved Training and **Requested Training** — Time or days which have been either requested or approved for training. One option is to set the requested hours at a slightly lower priority than the approved hours. This option would allow the color associated to *Requested Training* to appear in the grid on the Calendar pages for that specific time. If approved, the color would change to what is associated with *Approved Training.*

Note. This option requires implementation of the Human Resources Administer Training business process or PeopleSoft Enterprise Learning Management.

Approved Absence and **Requested Absence** — Time or days which have been requested or approved for absence. One option is to set the requested hours at a slightly lower priority than the approved hours. This option would allow the color associated to *Requested Absence* to appear in the grid on the Calendar pages for that specific time. If approved, the color would change to what is associated with *Approved Absence.*

Note. This option requires implementation of Global Payroll or Absence Management.

Approved Overtime and **Requested Overtime** — Time or days which have been requested or approved for overtime. One option is to set the requested hours at a slightly lower priority than the approved hours. This option would allow the color associated to *Requested Overtime* to appear in the grid on the Calendar pages for that specific time. If approved, the color would change to what is associated with *Approved Overtime.*

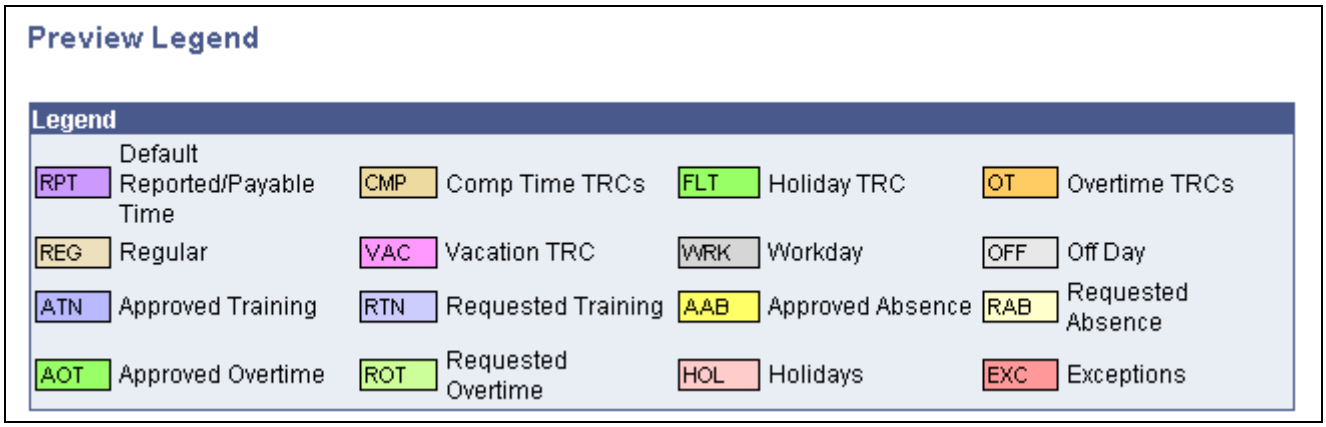
Holiday — Days defined as holidays by the company or organization.

Exceptions — If employee time produces exceptions during the Time Administration process, this option will create a link on the calendar page to the Exceptions Information page for more detailed information about the exception.

Previewing the Time Calendar Legend

Access the Preview Legend page.

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Preview Legend page

This page enables you to monitor the viewing option building process to assure the final design provides the necessary information in a readable format. You can see what symbols and colors have been designated for the various time events to be shown on the calendar. As you build your customized calendar views, check the legend periodically to review the symbols currently designated.

Establishing Compensatory Time Plans

To set up compensatory time plans, use the Compensatory Time Off Plan (COMP_TIME_PLAN) component.

This section discusses setting up compensatory time plans.

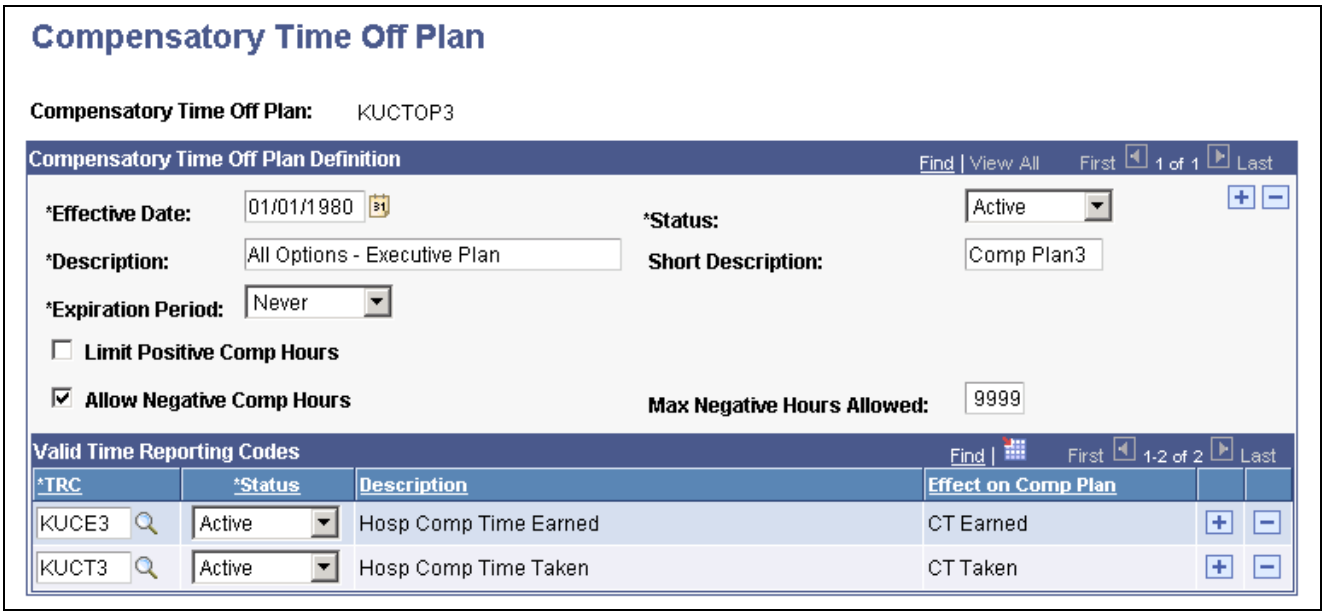
Page Used to Set Up Compensatory Time Plans

Page Name	Object Name	Navigation	Usage
Compensatory Time Off Plan	TL_COMP_TIME_PLAN	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Compensatory Time Off Plan, Compensatory Time Off Plan	Set up compensatory time plans for time reporters.

Setting Up Compensatory Time Plans

Access the Compensatory Time Off Plan page.

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Compensatory Time Off 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.

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Valid Time Reporting Codes

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

Appendix C, "Referential Integrity," page 735

Chapter 6, "Establishing Time Reporting Codes," page 101

Defining Exceptions

To define exceptions, use the Exception Definition (TL_EXCEPDEF_PNLGRP) component.

This section discusses defining exception criteria and assigning message numbers.

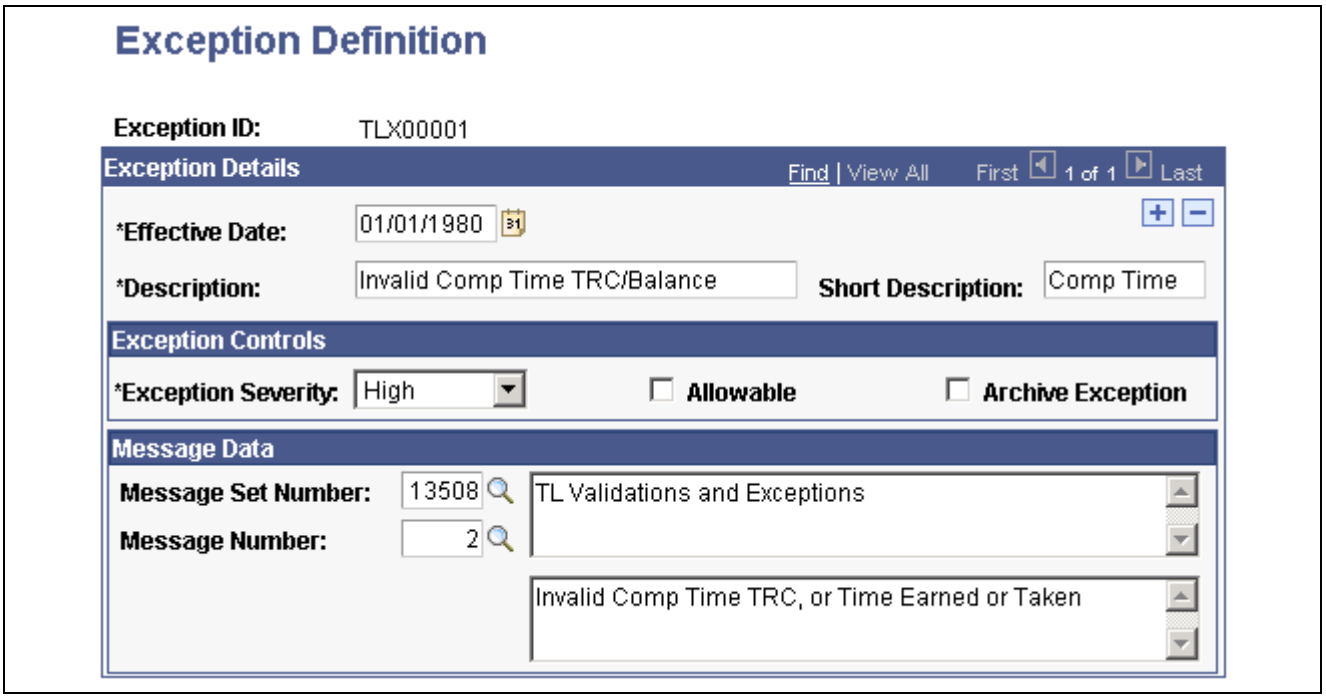
Page Used to Define Exceptions

Page Name	Object Name	Navigation	Usage
Exception Definition	TL_EXCEPDEF_PNL	Set Up HRMS, Product Related, Time and Labor, Validation Criteria, Exception Definition, Exception Definition	Establish exception criteria and assign message numbers.

Defining Exceptions and Assigning Message Numbers

Access the Exception Definition page.

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Exception Definition 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.

Note. If selecting an exception definition with a severity of "low" or "medium," the Allowable check box will automatically be selected. This is because all low and medium severity exceptions will automatically allow payable time to be created by Time Administration.

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 only 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 will create payable time for medium severity exceptions.

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 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. If selecting an exception definition with a severity of "low" or

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"medium", the Allowable check box will automatically be selected. This is because all low and medium severity exceptions will automatically allow payable time to be created by Time Administration.

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

Chapter 17, “Managing Time,” Managing Exceptions, page 480

Defining PeopleSoft Application Engine Sections

To define application engine section, use the AE Section Definition (TL_AE_SECTION_PNLG) component.

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

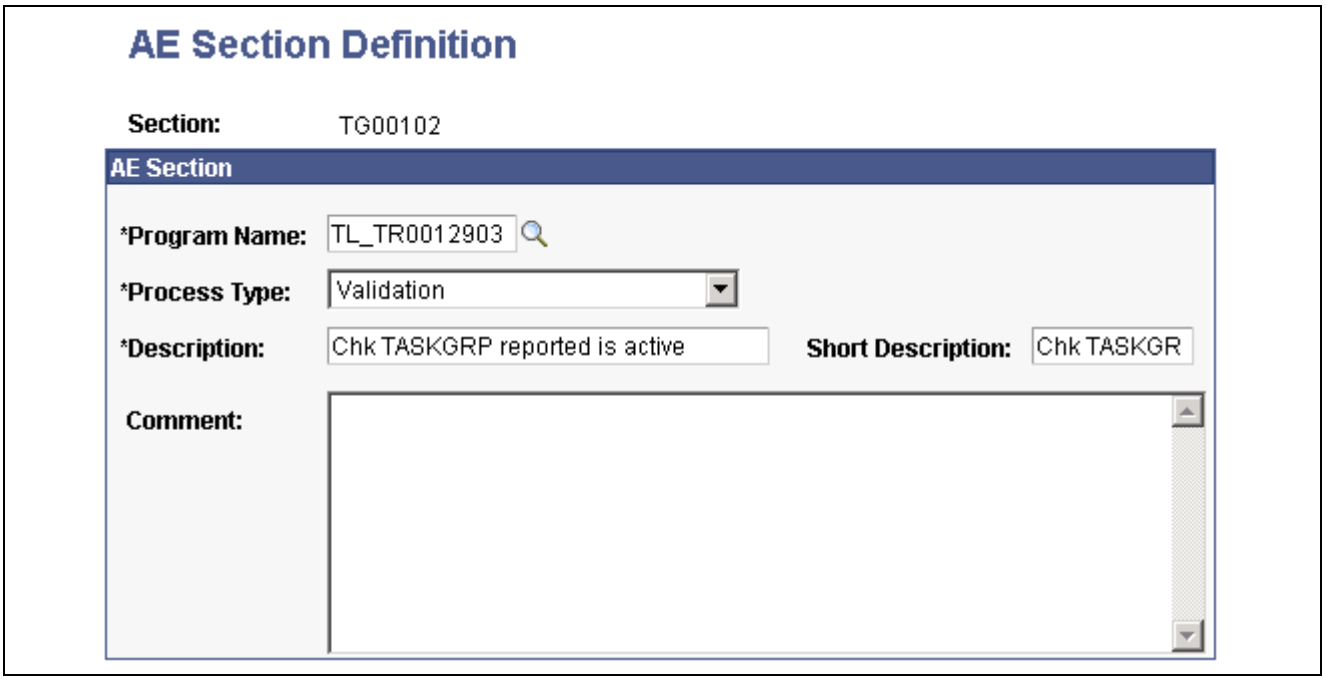
Page Used to Define PeopleSoft Application Engine Sections

Page Name	Object Name	Navigation	Usage
AE Section Definition (Application Engine section definition)	TL_AE_SECTION_DEFN	Set Up HRMS, Product Related, Time and Labor, Validation Criteria, AE Section Definition, AE Section Definition	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 Definition page.

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AE Section Definition 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

Appendix C, “Referential Integrity,” page 735

Chapter 17, “Managing Time,” Managing Exceptions, page 480

Chapter 12, “Creating Rules in Time Administration,” Working with User Exits, page 298

Using Validation Criteria

To define validation criteria, use the Validation Definition (TL_VALID_DEFN_PNLG) and the Validation Set Definition (TL_VALID_SET_PNLG) components.

This section discusses:

- Defining validation IDs.
- Grouping validation IDs.

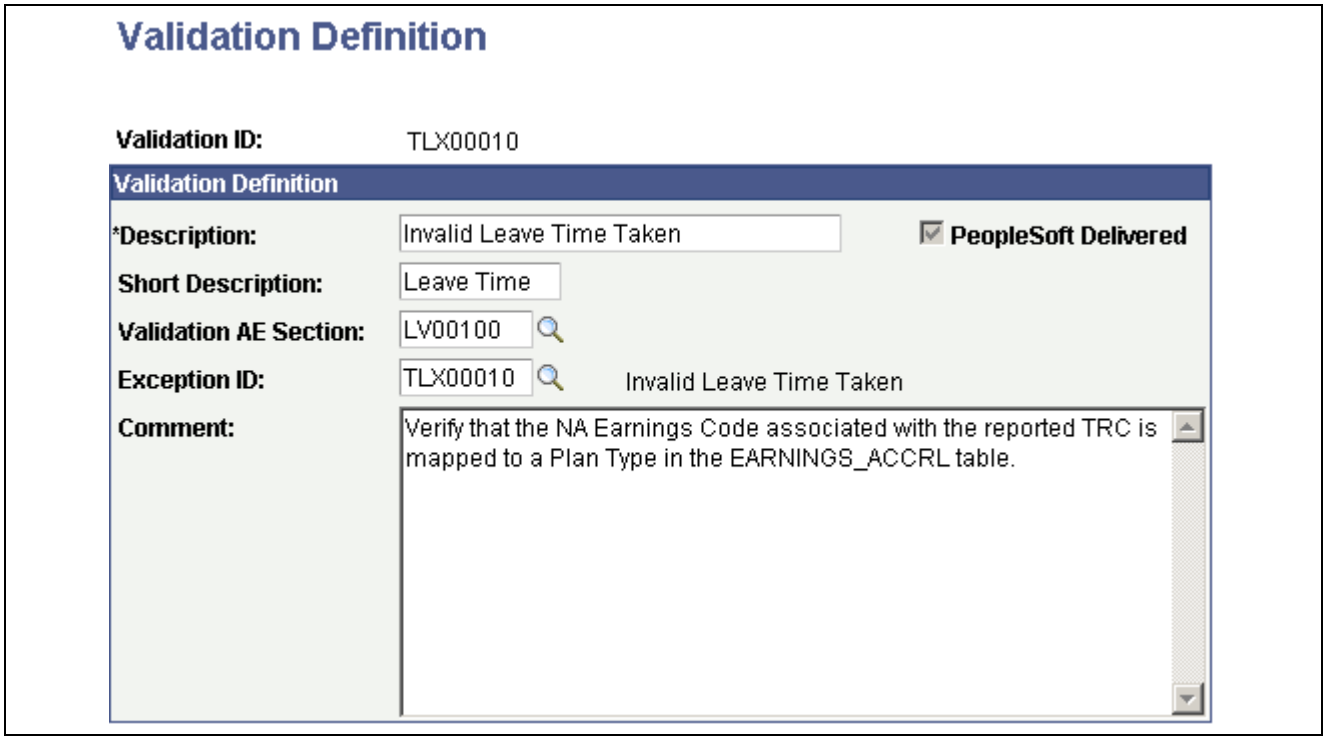
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Pages Used to Define and Group Validation IDs

Page Name	Object Name	Navigation	Usage
Validation Definition	TL_VALID_DEFN_PNL	Set Up HRMS, Product Related, Time and Labor, Validation Criteria, Validation Definition, Validation Definition	Define your validation IDs.
Validation Set Definition	TL_VALID_SET_PNL	Set Up HRMS, Product Related, Time and Labor, Validation Criteria, Validation Set Definition, Validation Set Definition	Group validation IDs.

Defining Validation IDs

Access the Validation Definition page.



Validation Definition page

Validation AE Section (validation 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.

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See Also

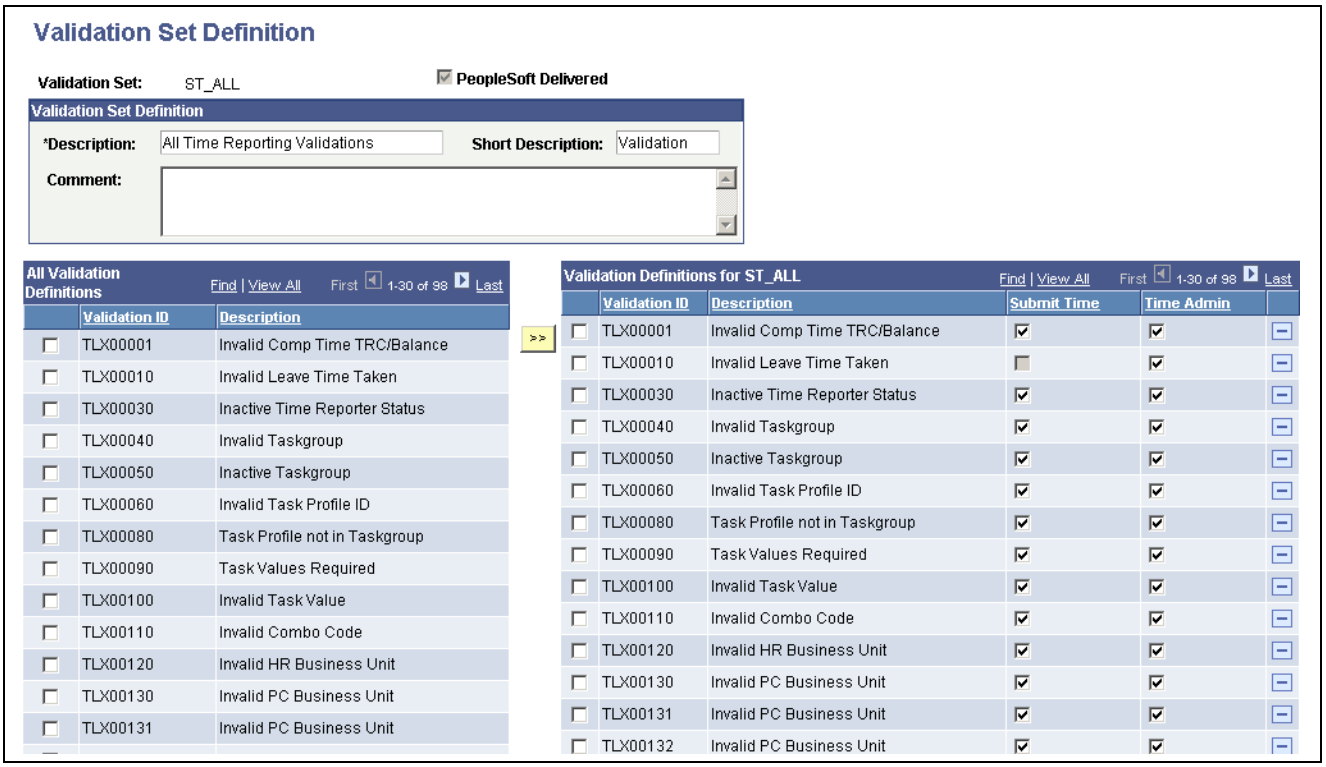
Chapter 4, "Setting Up Basic Tables," Defining PeopleSoft Application Engine Sections, page 70

Appendix C, "Referential Integrity," page 735

Chapter 4, "Setting Up Basic Tables," Defining Exceptions, page 68

Grouping Validation IDs

Access the Validation Set Definition page.



Validation Set Definition page

All Validation Definitions

A list of all validation IDs and descriptions is displayed in the grid. Two ways exist 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.

Validations Sets are configured to determine if the validation is run in Submit Time, Time Administration, both batch processes or neither.

Note. Validation TLX0010, Invalid Leave Time Taken, cannot be enabled for the Submit Time process.

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Validation Definitions for <Validation Set Name>

This grid (displayed on the right side of the Validation Set Definition page) 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.

Note. If validations are not enabled which check against key reporting time tables, such as TRCs, the time will not be processed and no exceptions will be generated.

See Appendix A, "Exceptions and Validations," page 659.

Defining Override Reason Codes

To define override reason codes, use the Override Reason Code (TL_OVRD_RSN_PNLGP) component.

This section discusses 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	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Override Reason Code, Override Reason Code	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 the Timesheet page.

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CHAPTER 5

Establishing Workgroups

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

- Set up workgroups.
- Make workgroup transfers.
- Make changes to a rule program for a workgroup.

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 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.

When selecting a workgroup for an employee with multiple jobs, keep in mind that you need to enroll each job in the same workgroup, in order for each job to be considered for rules that combine data for processing in the same batch.

See Also

Chapter 12, “Creating Rules in Time Administration,” Defining Template-Built Rules, page 246

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.

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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

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

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. If one is not found there, it uses the pay group schedule, and if no schedule is associated with the pay group, 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.

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.

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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

You cannot inactivate a workgroup or delete effective-dated rows in the following cases:

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 Schedule ID Overtime Limit ID

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

Setting Up Workgroups

To set up workgroups, use the Workgroup (TL_WKG_MAIN_PNLGRP) component. Use the TL_WKG_MAIN_PNLGRP component interface to load data into the tables for this component.

Here's how to define workgroups:

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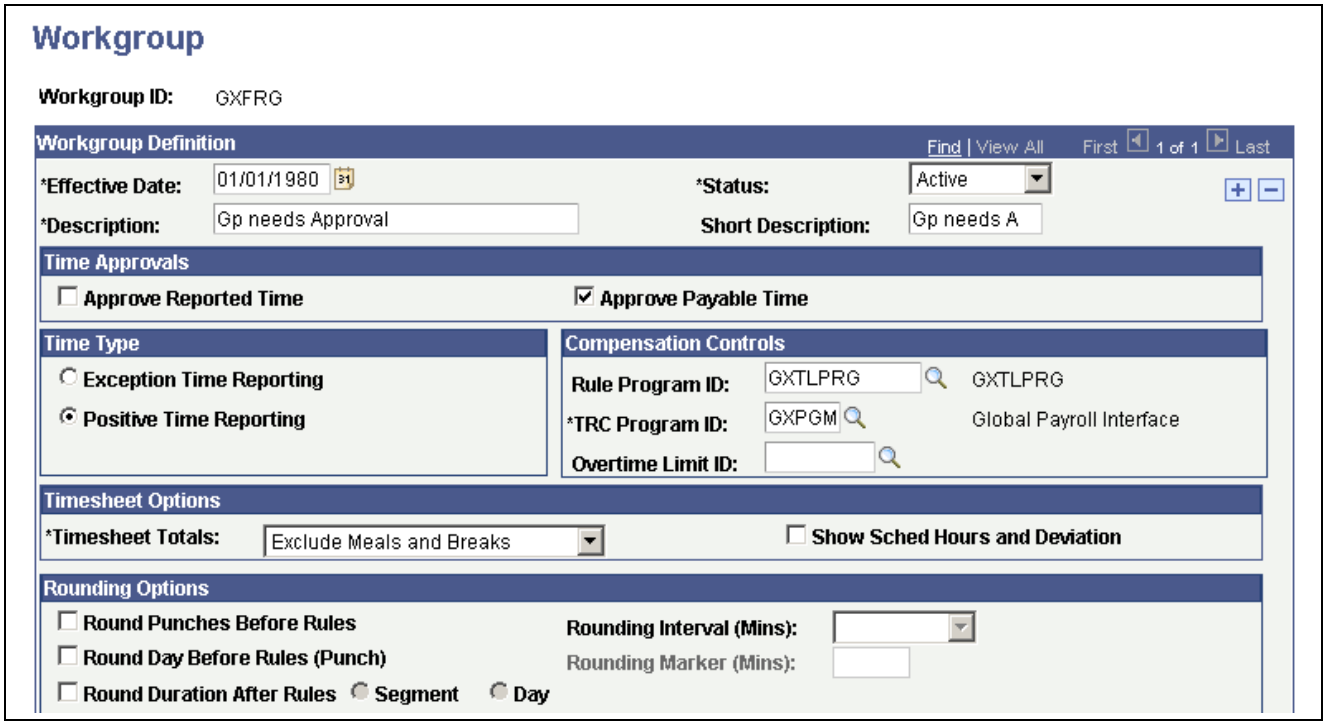
1. Enter basic parameters and approval requirements (if necessary).
2. Define the reporting time type.
3. Define the compensation controls.
4. Specify the workgroup defaults such as Schedule ID, Time Period ID, Comp Plan, and if and how the system generates and forecasts time based on schedules and holidays.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

Page Used to Define Workgroups

Page Name	Object Name	Navigation	Usage
Workgroup	TL_WRKGRP_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Workgroup, Workgroup	Define defaults, approval options, rounding options, and day breaker options for a workgroup.

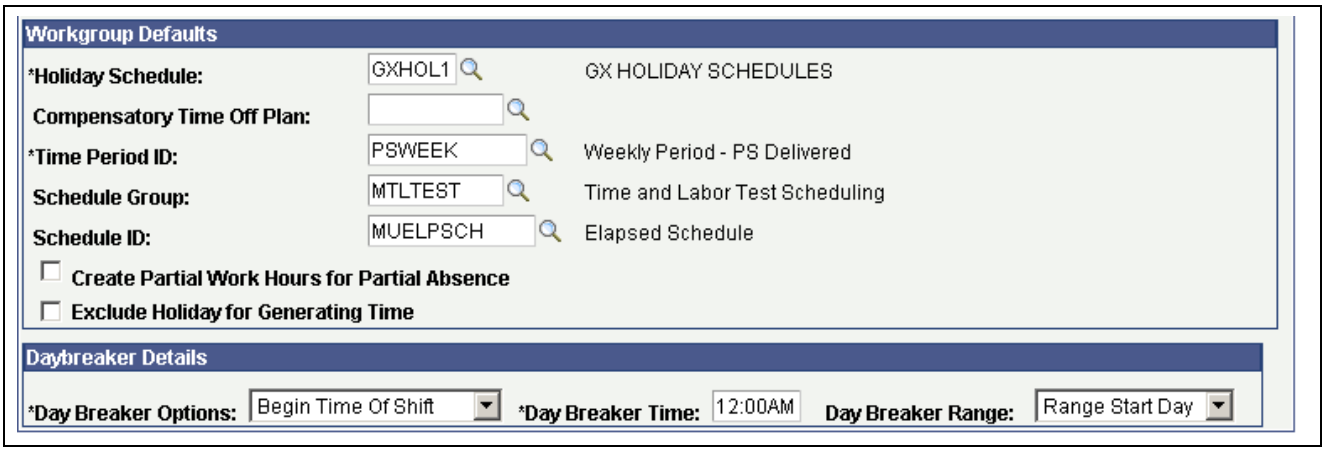
Entering Basic Parameters, Approvals and Status

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



Workgroup page (1 of 2)

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Workgroup page (2 of 2)

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.

Approve Payable Time

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, time reporters 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 check box 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.

Approve Reported Time

Select this check box if a manager's approval is required for reported time. Leave the check box clear if you do not want a manager to approve reported time.

The Approve Reported Time feature is another option for approval of time. If selected, it requires that a manager approve the actual time that was reported versus payable time that has been processed by the Time Administration process.

If you have Approve Reported Time selected, then when reported time is submitted, it will require approval before the Time Administration process selects the time, processes it, and generates payable time. If time is not approved, time will not be selected and run by the Time Administration process, and payable time will not be generated.

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Note. The following fields on this page trigger Referential Integrity: Approve Payable Time, Rule Program ID, TRC Program ID, Holiday Schedule, Comp Plan, Schedule ID, Day Breaker, Day Breaker Options, Day Breaker Range, Rounding Options , Rounding Interval, and Rounding Marker. Additionally, if the Create Partial Work Hours for Partial Absence or the Exclude Holiday for Generating Timeoptions are changed for exception time reporting workgroups, Referential Integrity is triggered. For positive time reporting workgroups, modifying these options does not trigger Referential Integrity. 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

Chapter 14, "Understanding Payable Time," page 387

Appendix C, "Referential Integrity," page 735

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

Defining the Reporting Time Type Group Box

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 the system runs Time Administration, 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. If no time is reported by an exception time reporter, the Time Administration process creates payable time based on the time reporter's schedule.

Note. No payable time is created from the schedule when Time Administration is run on days when zero hours are reported.

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.

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Rule Program ID

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

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

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

Overtime Limit ID

Select the Overtime Limit ID (if applicable), that applies to the members of the workgroup.

See Also

Chapter 6, "Establishing Time Reporting Codes," page 101

Chapter 12, "Creating Rules in Time Administration," Adding Rules to a Rule Program, page 311

Setting Up Rounding Options

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

There are three types of rounding in 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.

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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 Day Before Rules (Punch)

Select this option for daily rounding of punch time before Time and Labor rules are processed, but after the Day Breaker is applied. Using this option, punch time is not changed, but the duration associated with the first punch (IN) for the day is adjusted.

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_TIME table) 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

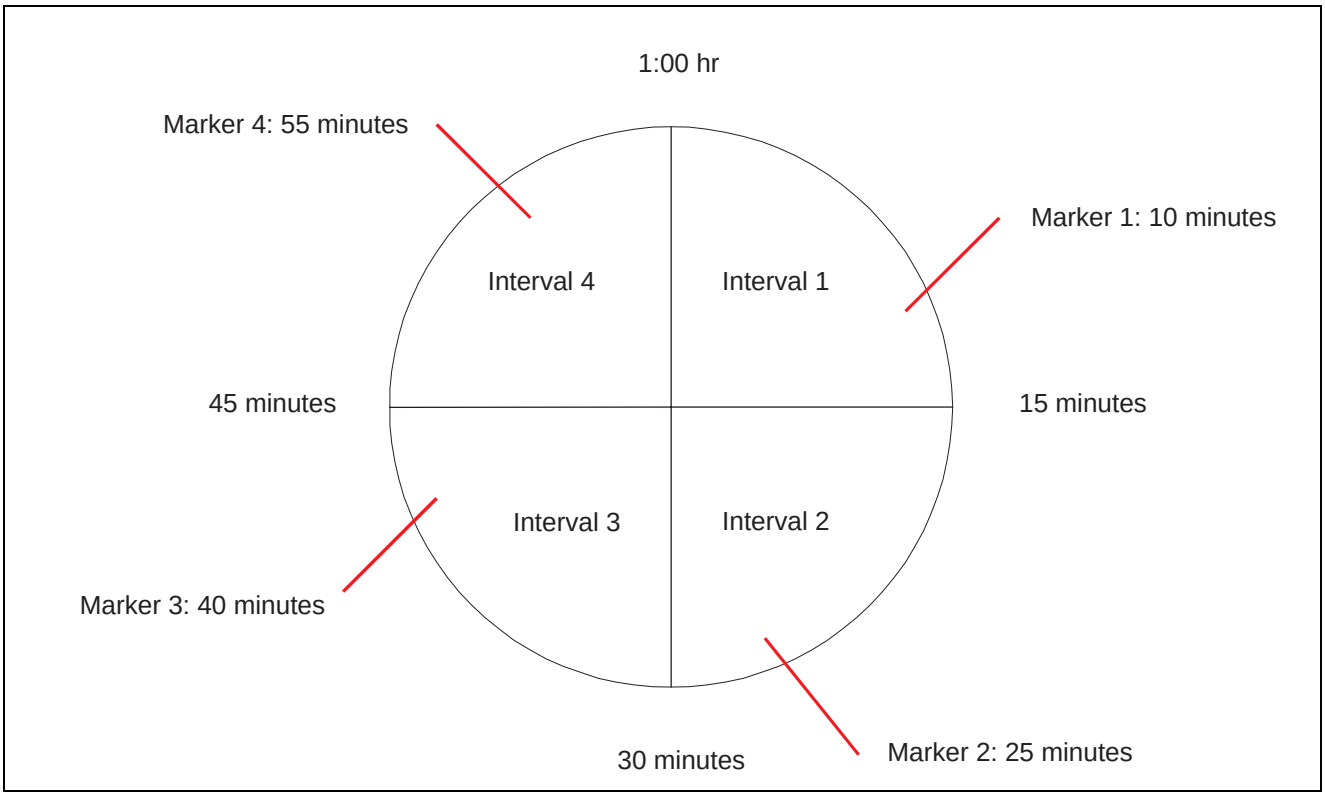
Interval 3: x:30 to x:45

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:

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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:

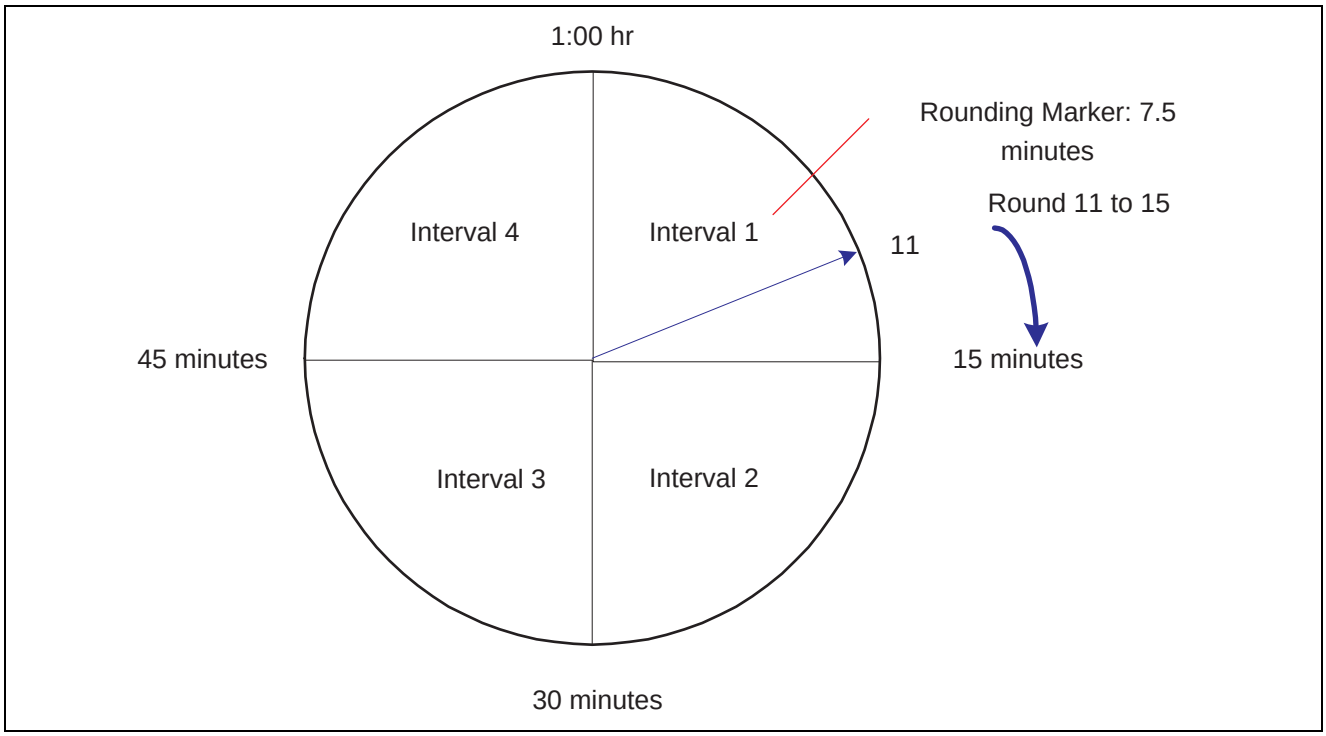
Rounding Option = Round Punches Before Rules

Rounding Interval = 15 Minutes

Rounding Marker = 7.5 Minutes

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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:

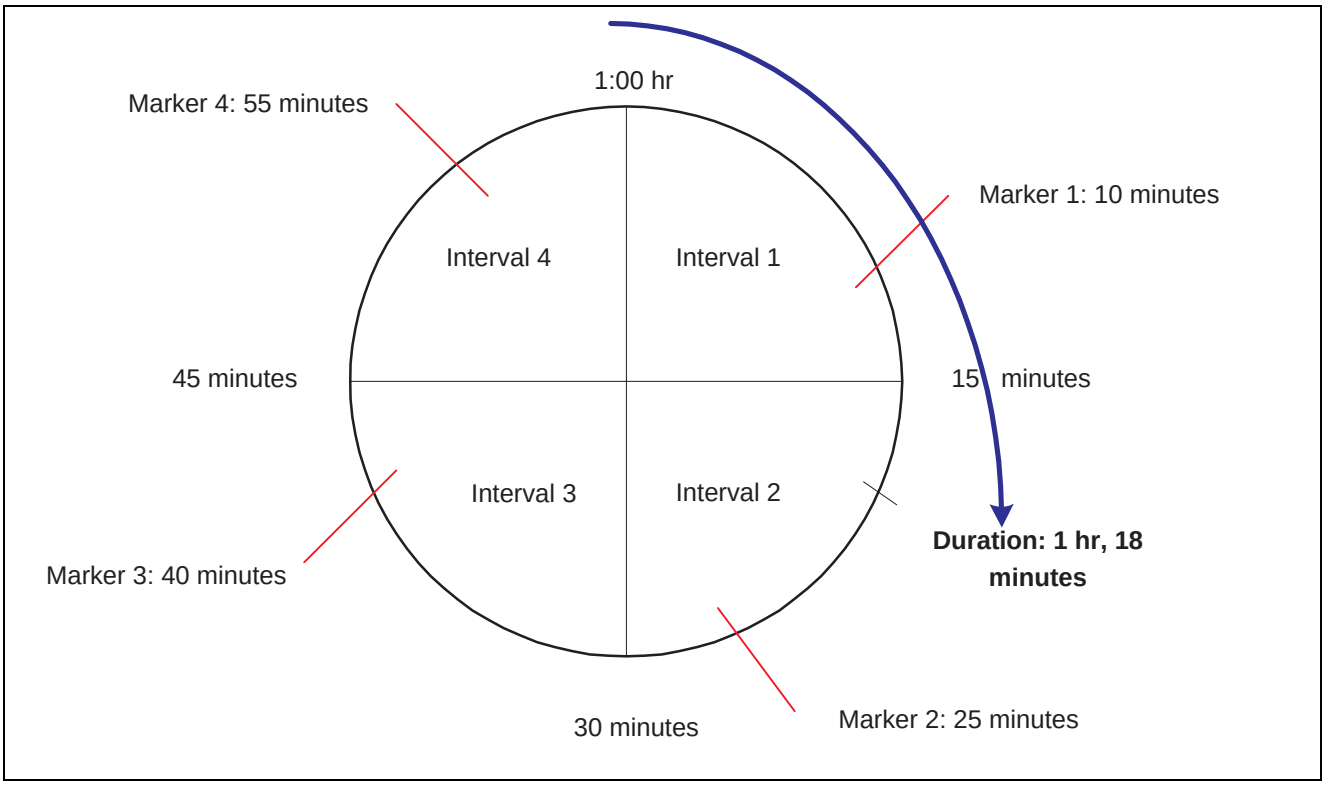
Example 1: Segment Rounding of Punch Time

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:

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Rounding a Duration

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

Example 2: Segment Rounding of Elapsed Time

To illustrate how the rounding process works in the case of an elapsed time reporter, let's assume that we have selected the same rounding options used in the previous example, and that our time reporter is scheduled to work 8 hours on a given day, but positively reports 4.33 hours (4 hours and 20 minutes). In this case, the system would round the time to 4.25. This is because 4.33 hours 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.

Example 3: Segment Rounding After Rules of Punch Time

Rounding Interval = 15 minutes

Rounding Marker = 7.5 minutes

Reported Time					
Punch Time	*Punch Type*	*Segment*	*Rounded*	*Project*	*Department*
8:10 a.m.	IN	1 hour, 50 minutes	1.75	A	

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Reported Time					
10:00 a.m.	BREAK	20 minutes	.25		Y
10:20 p.m.	IN	2 hours, 40 minutes	2.75	A	
1:00 p.m.	MEAL	1 hour, 5 minutes	1.00		Y
2:05 p.m.	IN	2 hours, 55 minutes	3.00	B	
5:00 p.m.	OUT				

Note. All segments are rounded first, then like segments are summed.

Payable Time Results		
REG	3 hours	Project B
REG	4.5 hours	Project A
REG	1.25 hours	Department A

Example 4: Day Rounding After Rules of Punch Time

Rounding Interval = 15 minutes

Rounding Marker = 7.5 minutes

Reported Time				
Punch Time	*Punch Type*	*Duration*	*Project*	*Department*
8:10 a.m.	IN	1 hour, 50 minutes	A	
10:00 a.m.	BREAK	20 minutes		Y
10:20 p.m.	IN	2 hours, 40 minutes	A	
1:00 p.m.	MEAL	1 hours, 5 minutes		Y
2:05 p.m.	IN	2 hours, 55 minutes	B	
5:00 p.m.	OUT			

Total all like segments first, then round:

Project/Dept.	Totalled Time by Task
Project A	4 hours, 30 minutes
Project B	2 hours, 55 minutes
Department Y	1 hour, 25 minutes

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Payable Time Results		
REG	3 hours	Project B
REG	4.5 hours	Project A
REG	1.5 hours	Department Y

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Step 8: Matching Punches, page 347

Chapter 13, "Understanding the Batch Process in Time Administration," Step 12: Performing Rounding, Task Distribution and Estimated Gross, page 356

Specifying Workgroup Defaults

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

Holiday Schedule

Select a Holiday Schedule from the drop-down list box. 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.

Time Period ID

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.

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Schedule Group

Select a Schedule Group value. This value will filter the Schedule IDs available per SetID. This field is a required field if Schedule ID is selected.

Schedule ID

Select from the drop-down 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 (such as Elapsed versus 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.

Timesheet Totals

This totalling option is used to determine total reported hours on the punch Timesheet. Select a totalling option for the workgroup default. Valid values are *Exclude Meals and Breaks*, *Include Breaks*, *Include Breaks and Meals*, or *Include Meals*.

Rotation ID

This field is displayed if the Schedule ID chosen is a Rotating Schedule ID.

Show Schedule Hours and Deviation

If this field is selected, additional fields appear on the Timesheet page. In the Timesheet grid, the Schedule Hours field appears. In the Reported Time Summary grid, the Total Scheduled Hours and Schedule Deviation fields appear.

Create Partial Work Hours for Partial Absence

This check box affects generated or forecasted time differently depending on the method you use to generate time. When selected:

- The Time Administration process creates the balance of time to sum to scheduled hours when either a partial day absence or no time has been reported. This occurs only for exception-type workgroups. This setting is ignored if the Schedule ID is defined as punch.
- The first option on the Mass Time Reporting page creates the balance of reported time to sum to scheduled hours when either no time has been reported or if the time that has been reported from other sources is less than scheduled hours. Examples of other sources are absences, comp time taken, and leave time taken.
- When forecasting time for both exception and positive workgroups, the system forecasts time to sum to scheduled hours when either no time has been reported or absence time has been reported.

The reported time source code (RT_SOURCE) is set to SCH for all time that is created based on scheduled hours.

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Note. The default setting for the Create Partial Work Hours check box is cleared. The default setting forces the system to use full day absence logic when generating time, provided that the Regenerate Reported Time for Absence Entry check box is selected on the TL Installation page. If the Create Partial Hours check box is selected and the Regenerate Reported Time for Absence Entry check box on the TL Installation page is not selected, there is no impact on reported time.

Exclude Holiday for Generating Time

This check box affects generated or forecasted time differently depending on the method you use to generate time. The default setting for this option is cleared. With the default setting:

- The Time Administration process creates reported or payable time on scheduled holidays for exception-type workgroups only. This setting is ignored if the Schedule ID is defined as punch.
- The first option on the Mass Time Reporting page creates time on scheduled holidays for both exception and positive time reporters.
- When forecasting time for both exception and positive workgroups, the system forecasts time to include scheduled holidays.

The opposite occurs when the Exclude Holiday for Generating Time check box is selected: The system will not generate time on scheduled holidays or include holidays when forecasting time.

The reported time source code (RT_SOURCE) is set to SCH for all time that is generated based on scheduled holidays.

See Also

Chapter 4, “Setting Up Basic Tables,” Setting Up System Defaults and Loading Dates, page 26

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, “Integrating with PeopleSoft Enterprise Time and Labor”

Chapter 8, “Defining Work Schedules,” page 161

Chapter 22, “Using Manager Self-Service for Scheduling Components,” Assigning Schedules, page 630

Chapter 10, “Setting Up Time Reporters,” Assigning and Viewing Compensatory Time Plans, page 216

Chapter 4, “Setting Up Basic Tables,” Establishing Time Periods, page 43

Chapter 4, “Setting Up Basic Tables,” Establishing Compensatory Time Plans, page 66

Chapter 13, “Understanding the Batch Process in Time Administration,” Step 8: Matching Punches, page 347

Chapter 13, “Understanding the Batch Process in Time Administration,” Step 13: Post Rule Validation, page 361

Setting Up Day Breaker Options

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

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In 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 Time and Labor, 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.

Consider the following example:

If the day breaker is 12 midnight, the virtual Day Breaker Range is from 12 a.m. one day to 11:59 p.m. of the next day.

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 (because it represents a "virtual" 24 hour day rather than an actual calendar day).

   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.

   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.

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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.

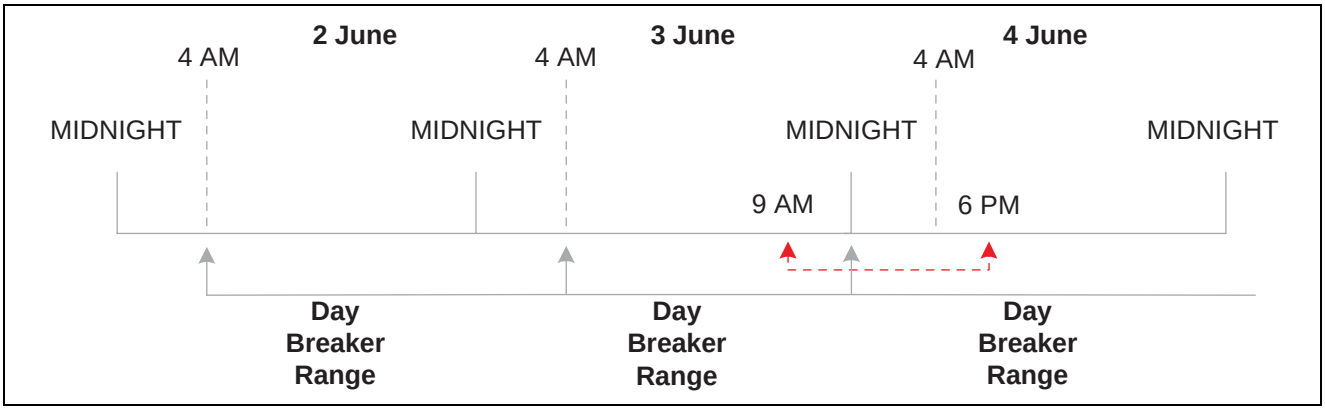
   Range End Day Select this option if you want to assign punches within a Day Breaker Range to the calendar (or "actual") day intersected by the end of the range.

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 a.m..
- 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 a.m. on June 3 and ends at 6:00 a.m. on June 4. The shift therefore crosses the Day Breaker.

This scenario can be represented as follows:



Establishing a DUR

Because the first punch occurs at 9 a.m. on June 3, the system includes the entire shift within the Day Breaker Range in which the first punch falls—the range that begins at 4:00 a.m. June 3 and ends at 3:59 a.m. on June 4. However, the system will set the DUR for the shift as a whole to June 4. 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 June 4.

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

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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.

Additional Day Breaker 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

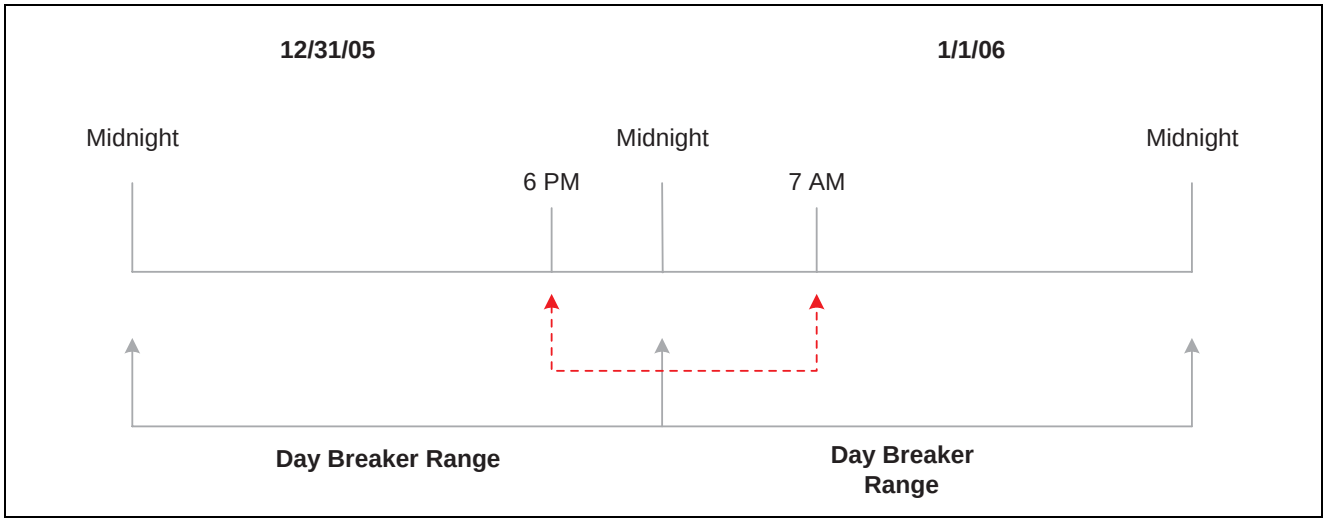
In this example, assume that a time reporter reports time that crosses the day breaker, which is set to 12 midnight.

The time reporter enters the following punches:

Punch IN: 18:00, December 31, 2005

Punch OUT: 07:00, January 1, 2006

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	December 31, 2005
End Time of Shift	Range Start of Day	January 1, 2006
Majority of Shift	Range Start of Day	January 1, 2006
Split by Daybreaker	Range Start of Day	6 hours fall on December 31, 2005 and 7 hours fall on January 1, 2006.

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Day Breaker Option	Day Breaker Range	Resulting DUR
Begin Time of Shift	Range End of Day	December 31, 2005
End Time of Shift	Range End of Day	January 1, 2006
Majority of Shift	Range End of Day	January 1, 2006
Split by Day breaker	Range End of Day	6 hours fall on December 31, 2005 and 7 hours fall on January 1, 2006.

Example 2

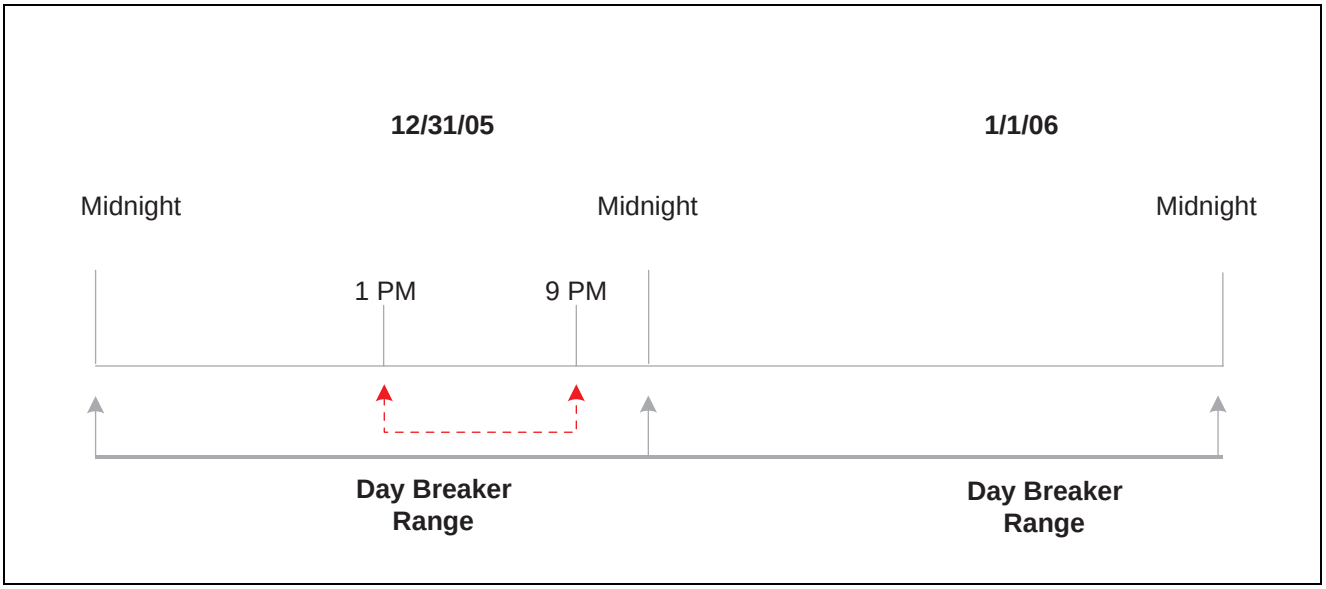
In this example, assume that the time reporter's time does not cross the day breaker. The day breaker is set to midnight.

The time reporter enters the following punches:

Punch IN: 13:00, 31 December 2005

Punch OUT: 21:00, 31 December 2005

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



Dates and day breaker ranges

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

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Day Breaker Option	Day Breaker Range	Resulting DUR
Begin Time of Shift	Range Start of Day	Because the begin time of the shift (1:00 p.m.) is on December 31, 2005 and the Range Start of Day falls on the day of December 31, 2005, the resulting DUR is December 31, 2005.
End Time of Shift	Range Start of Day	Because the end time of the shift (9:00 p.m.) is on December 31, 2005 and the Range Start of Day falls on the day of December 31, 2005, the resulting DUR is December 31, 2005.
Majority of Shift	Range Start of Day	December 31, 2005
Split by Daybreaker	Range Start of Day	December 31, 2005
Begin Time of Shift	Range End of Day	Since the begin time of shift (1:00 p.m.) is on December 31, 2005 and the Range End of Day falls on the day of December 31, 2005, the resulting DUR is December 31, 2005.
End Time of Shift	Range End of Day	Since the end time of the shift (9:00 p.m.) is on December 31, 2005 and the Range End of Day falls on the day of December 31, 2005, the resulting DUR is December 31, 2005.
Majority of Shift	Range End of Day	December 31, 2005
Split by Daybreaker	Range End of Day	December 31, 2005

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.

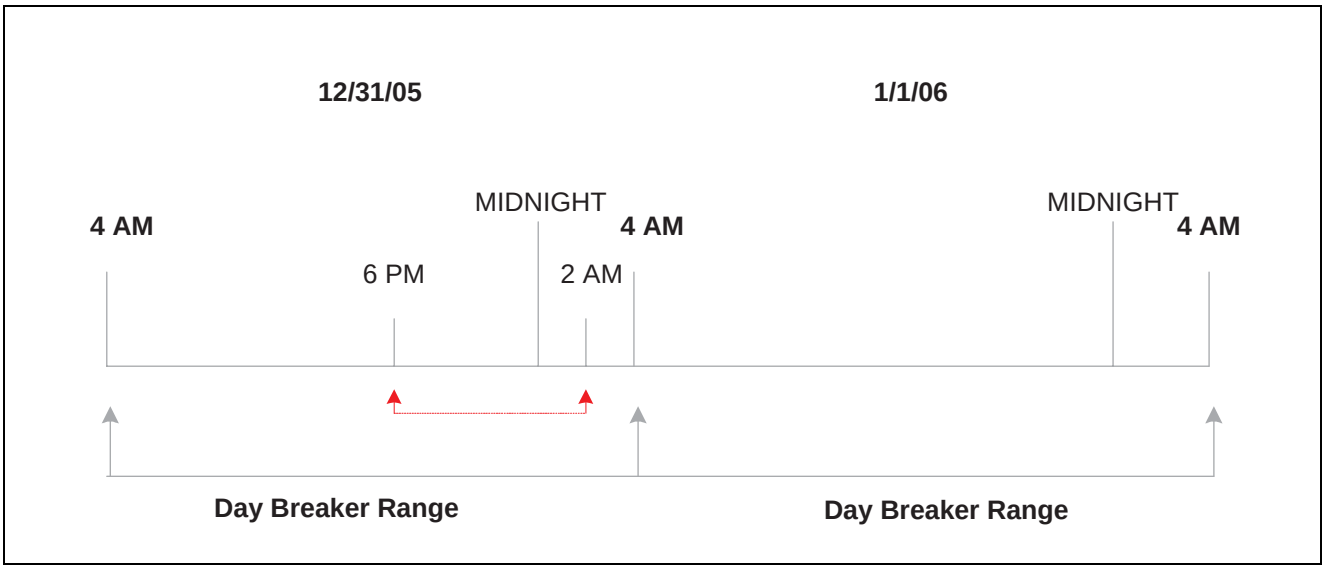
The time reporter enters the following punches:

Punch IN: 18:00, 31 December 2005

Punch OUT: 02:00, 1 January 2006

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

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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	December 31, 2005
End Time of Shift	Range Start of Day	December 31, 2005
Majority of Shift	Range Start of Day	December 31, 2005
Split by Daybreaker	Range Start of Day	December 31, 2005
Begin Time of Shift	Range End of Day	January 1, 2006
End Time of Shift	Range End of Day	January 1, 2006
Majority of Shift	Range End of Day	January 1, 2006
Split by Daybreaker	Range End of Day	January 1, 2006

Example 4

In this example, assume that the time reporter reports time that crosses the day breaker, which is set to 4 AM.

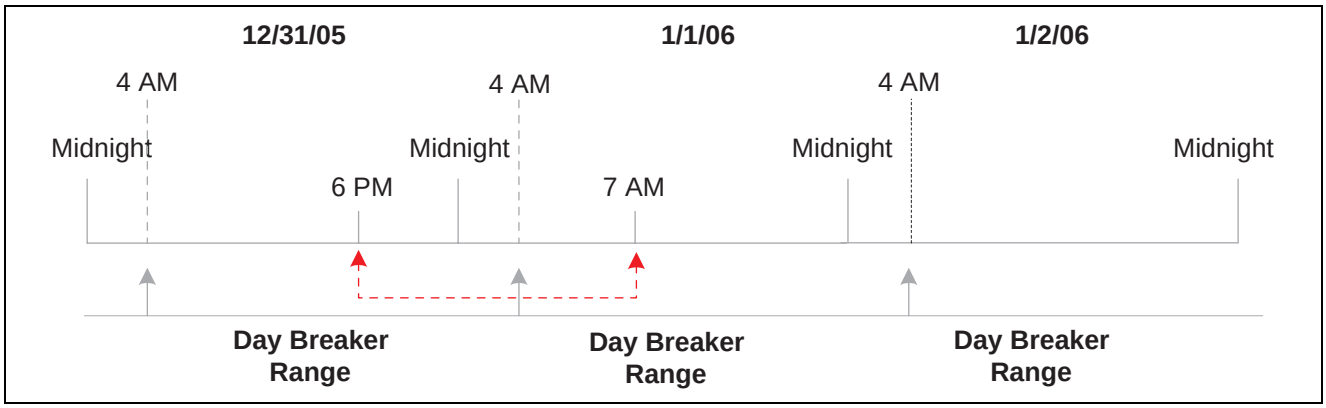
The time reporter enters the following punches:

Punch IN: 18:00, December 31, 2005

Punch OUT: 07:00, January 1, 2006

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



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	Because the begin time of the shift (6:00 p.m.) is on December 31, 2005 and the Range Start of Day falls on the day of December 31, 2005, the resulting DUR is December 31, 2005..
End Time of Shift	Range Start of Day	Because the end time of the shift (7:00 a.m.) is on January 1, 2006 and the Range Start of Day falls on the day of January 1, 2006, the resulting DUR is January 1, 2006.
Majority of Shift	Range Start of Day	December 31, 2005
Split by Daybreaker	Range Start of Day	10 hours fall on December 31, 2005 and 3 hours fall on January 1, 2006.
Begin Time of Shift	Range End of Day	Because the begin time of the shift (6:00 p.m.) is on December 31, 2005 and the Range End of Day falls on the day of January 1, 2006, the resulting DUR is on January 1, 2006.
End Time of Shift	Range Start of Day	Because the end time of the shift (7:00 a.m.) is on January 1, 2006 and the Range Start of Day falls on the day of January 2, 2006, the resulting DUR is January 2, 2006.

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Day Breaker Option	Day Breaker Range	Resulting DUR
Majority of Shift	Range End of Day	January 1, 2006
Split by Daybreaker	Range End of Day	10 hours fall on January 1, 2006 and 3 hours fall on January 2, 2006.

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Step 8: Matching Punches, page 347

Making Workgroup Transfers

This section discusses 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.

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.

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.*

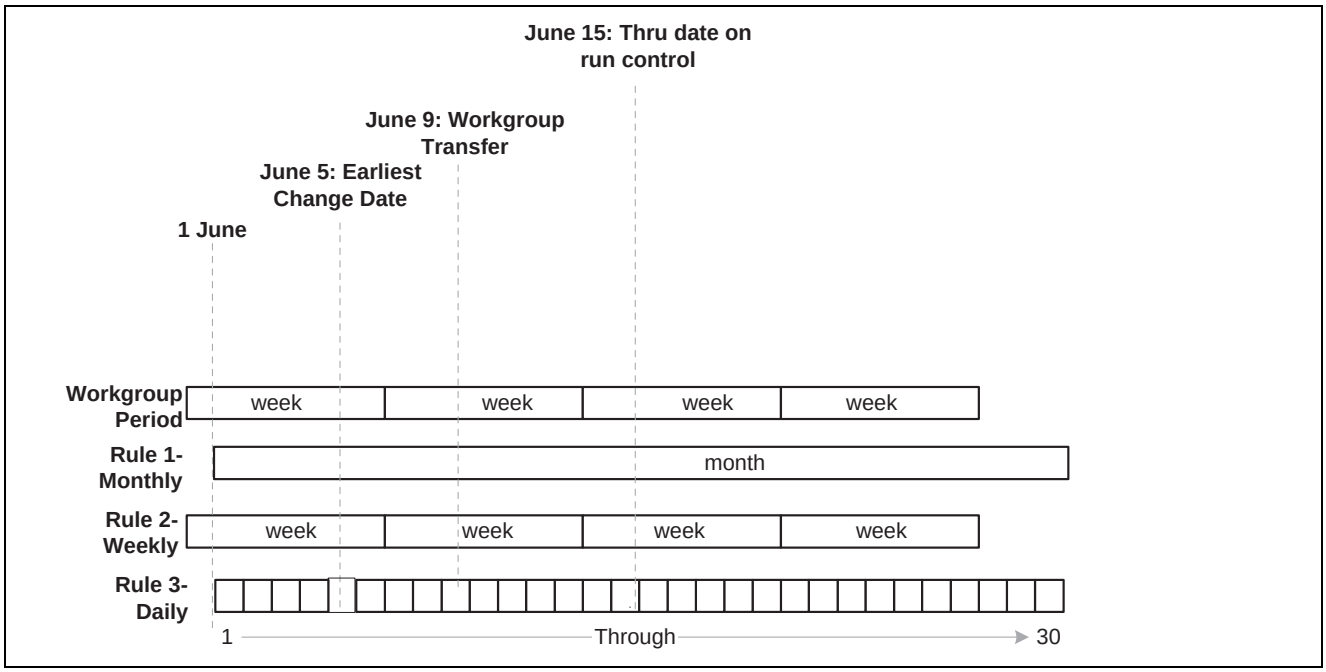
Example

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.

Note. 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.'

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Workgroup transfer example

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.

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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 changes 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

Chapter 15, “Reporting Time,” page 407

Making Changes to a Rule Program of a Workgroup

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.

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- 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 1/1/2006 you cannot reprocess dates prior to 1/1/2006. 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

Chapter 12, “Creating Rules in Time Administration,” Adding Rules to a Rule Program, page 311

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CHAPTER 6

Establishing Time Reporting Codes

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

- Define time reporting code (TRC) categories.
- Define and map TRCs.
- Define TRC programs.
- Define units of measure.

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 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 Payroll for North America 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.

Since Time and Labor controls eligibility of pay through TRC programs, you may be able to reduce the number of earnings programs that must be created. The TRC program specifies valid TRCs for an employee, which are mapped to earnings codes. For example, you could create an earnings program containing all possible earnings codes for time reporters, and the TRC program controls which earnings codes are applicable to each time reporter (through TRCs).

A TRC category is used to group together TRCs for summation (viewing time online) and reporting purposes.

Common Elements Used 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.
TRC Category	A TRC Category groups together TRCs for summation and reporting purposes.

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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.

Defining Time Reporting Code (TRC) Categories

To define time reporting code categories, use the TRC Category (TL_TRC_CATEGORY) component.

Time and Labor enables you to group TRCs together for summation and reporting purposes. You can set up and define TRC categories that you want to use. For example, you can create a TRC category called Absence with individual TRCs of PTO, Bereavement, and Military Leave, all of which can be mapped to the TRC category of Absence.

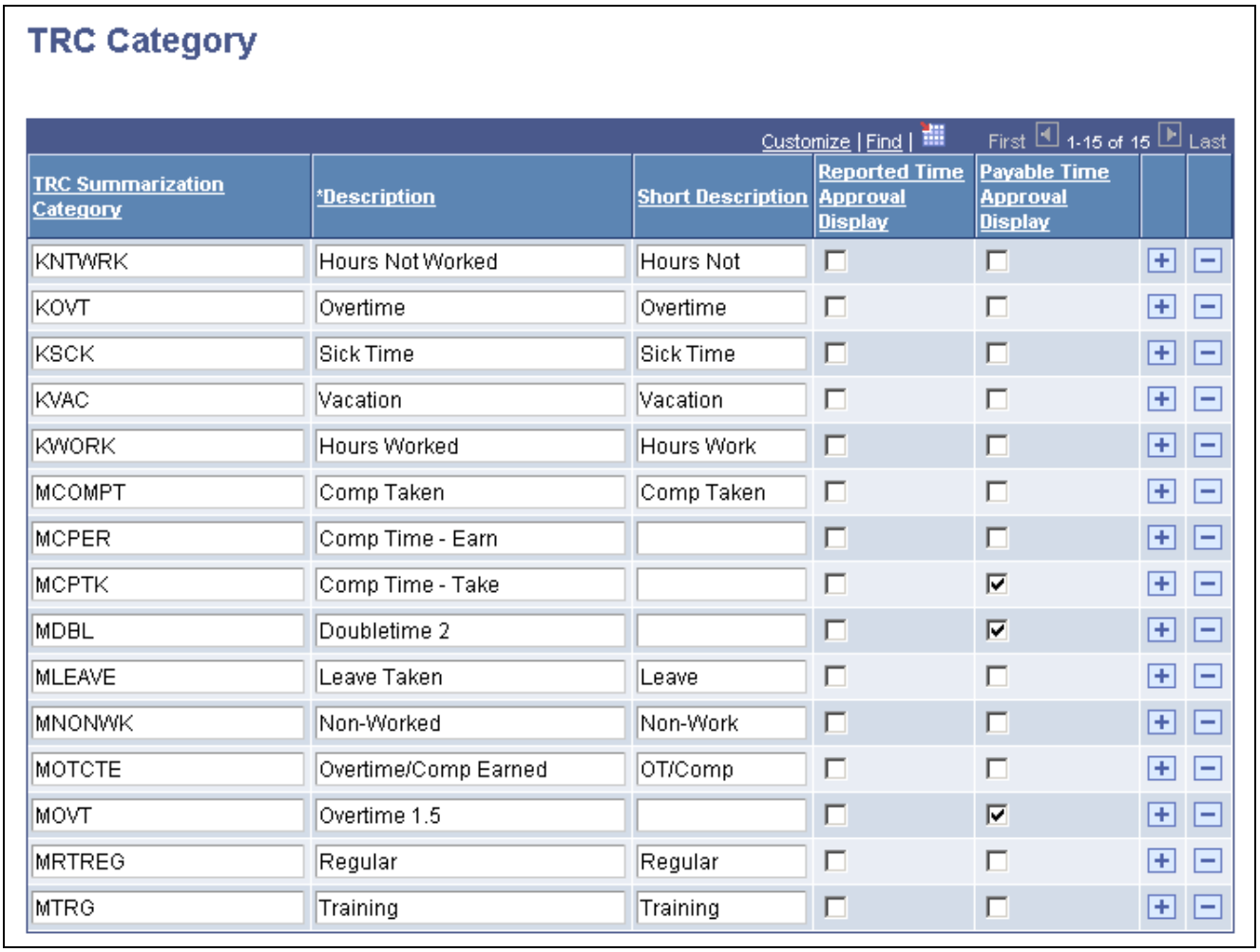
Pages Used to Define Time Reporting Code (TRC) Categories

Page Name	Object Name	Navigation	Usage
TRC Category	TL_TRC_CATEGORY	Set Up HRMS, Product Related, Time and Labor, Time Reporting, TRC Category, TRC Category	Define TRC Categories.

Defining Time Reporting Code (TRC) Categories

Access the TRC Category page.

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TRC Category

Customize | Find | First 1-15 of 15 Last

TRC Summarization Category	*Description	Short Description	Reported Time Approval Display	Payable Time Approval Display		
KNTWRK	Hours Not Worked	Hours Not	☐	☐	+	−
KOVT	Overtime	Overtime	☐	☐	+	−
KSCK	Sick Time	Sick Time	☐	☐	+	−
KVAC	Vacation	Vacation	☐	☐	+	−
KWORK	Hours Worked	Hours Work	☐	☐	+	−
MCOMPT	Comp Taken	Comp Taken	☐	☐	+	−
MCPER	Comp Time - Earn		☐	☐	+	−
MCPTK	Comp Time - Take		☐	☑	+	−
MDBL	Doubletime 2		☐	☑	+	−
MLEAVE	Leave Taken	Leave	☐	☐	+	−
MNONWK	Non-Worked	Non-Work	☐	☐	+	−
MOTCTE	Overtime/Comp Earned	OT/Comp	☐	☐	+	−
MOVT	Overtime 1.5		☐	☑	+	−
MRTREG	Regular	Regular	☐	☐	+	−
MTRG	Training	Training	☐	☐	+	−

TRC Category page

Reported Time Approval Display Check to display the category on the Reported Time Approval page. You can only check up to 3 (three) categories to display.

Payable Time Approval Display Check to display the category on the Payable Time Approval page. You can only check up to 3 (three) categories to display.

Note. The Timesheet configuration is still set on the TL Installation table but a note on the TRC Category page lets you know that all categories that have time reported to them will appear on the Timesheet and that you need to go to the TL Installation table to disable.

Defining and Mapping Time Reporting Codes (TRCs)

To define and map time reporting codes, use the Time Reporting Codes (TRC) (TL_TRC_MAIN_PNLGRP) component. Use the TL_TRC_MAIN_PNLGRP component interface to load data into the tables for this component.

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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, 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 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 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. Set up compensation and interface options.

Synchronizing TRCs with NA Earnings Codes

We enable you to synchronize your TRCs to Payroll for North America 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 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 that are 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.

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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 Instance Overridable fields are hidden and default to *Selected.*
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 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.

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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, then reselect the same NA earnings code and click 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 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:

- Remove the earnings code in the Map to NA Earnings Code field and click the Unsynch 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 Enterprise Payroll for North America 9.0 PeopleBook, “Defining Earnings Codes and Earnings Programs,” Establishing Earnings Codes

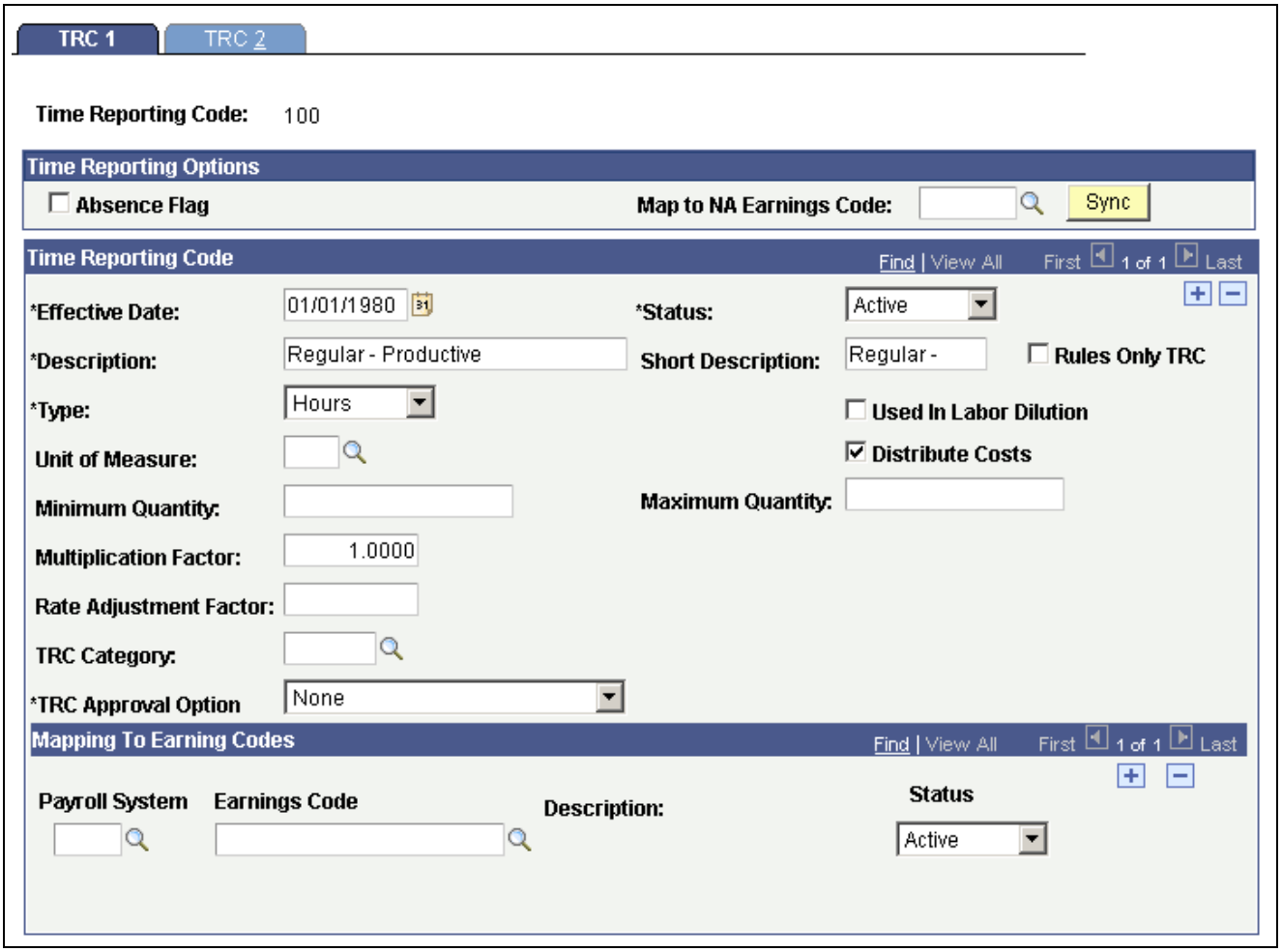
Pages Used to Define and Map Time Reporting Codes

Page Name	Object Name	Navigation	Usage
TRC 1	TL_TRC_PNL1	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Time Reporting Codes (TRC), TRC 1	Define Time Reporting Code attributes and map TRCs to earnings codes.
TRC 2	TL_TRC_PNL2	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Time Reporting Codes (TRC) TRC 2	Set up compensation and interface options and enter optional comments.

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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 Roles Profile that is set up 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.

Absence Flag Select this check box if you want this TRC to be used in absence processing. When you select this option, the system displays fields in the Mapping to Earnings Codes group box that correspond to the values you select in the Payroll System field: If *GP* is selected, the Absence Take Code and Earnings Code fields are displayed. If *NA* is selected, the Absence Earnings Code and NA Earnings Code fields are displayed. This occurs only if you have selected Absence Management 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 Payroll for North America system. It displays values that are active. This element will only be displayed when

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you have selected Payroll for North America 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 Payroll for North America.

Note. An Absence TRC can be simultaneously used for both GP absence processing and NA absence processing. You can also map a 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 synch 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 (REG, MOREG, MEG, MCREG, KUREG, KUMLO, KUCT3, KUCT2, KUCT1, KDSAD,) (13500,169) Selected Earnings Code is Active with TRCs, do you wish to inactivate the Earnings Code now? The status of the Earnings code mapping on the TRC will be set to inactive. Do you wish to update the TRCs which are mapped to this Earnings Code now?

If you inactivate the maximum effective-dated row on the NA earnings code, you will receive the following warning message: Selected Earnings Code is in 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

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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 unavailable for entry.

Rules Only TRC Select this check box to denote a TRC as being used only by Rules in Time Administration.

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.

This table provides the valid TRC Type combinations with Earnings Types, Comp Rate Code Types, and TL Quantities.

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

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TRC Type	Earnings Payment Type	Comp Rate Code Type	TL Quantity
	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	

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TRC Type	Earnings Payment Type	Comp Rate Code Type	TL Quantity
	H − Hours Only	HF − Hourly + Flat Amount	
		HR − Hourly Rate	
		PC − Percent	
	U − Unit/Overridable Rate	Not Allowed	

Additional points to consider when reporting Comp Rate codes in Time and Labor include the follow:

1. Do not select the Base Pay check box for any Comp Rate code that is positively reported in Time and Labor.
2. A Comp Rate Code cannot be paid if the reported TRC is mapped to earnings code that has a Payment Type defined as *Amounts Only* and also has a value entered in the Earnings Adjustment Factorfield.
3. For Comp Rate Codes with an *Hourly Rate* or *Flat Amount* Rate Code Type, you cannot report an Override Rate.
4. For Comp Rate Codes with a Percent or Hourly Rate + Flat Amount rate code type, you can report an Override Rate.
5. Only Comp Rate Codes with a value of *None* in the Calculated By field are valid for Time and Labor.

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.

Unit of Measure Select a unit of measure if you entered *Units* in the Type field. The Unit of Measure field needs to be populated if you are integrating with PS Projects and PS EPM, whether it is an Hours or Units type TRC. This field also needs to be populated as it is included with payable time when sent to PS Projects and PS EPM, for further rate processing in these other products.

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 unavailable for entry.

Distribute Costs Select this check box if the TRC will 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 option on the NA earnings code. You can change this value after

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the sync process. In most cases, earnings add to gross pay. However, certain types of earnings may not. One example is an earnings that is not a monetary payment, 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.

Minimum Quantity Use this field to define your limits for time entry for any TRC type. For example, if you set the value in this field to 4, and a user reports a value of 2, the system will generate an exception stating that the amount is below the minimum for this TRC. This field should not be used if the TRC is synchronized with a Flat Amount NA earnings code.

Maximum Quantity Use this field to define your maximum limits for time entry for any TRC type. For example, if you set the maximum to 8, and a user reports 10, the system will generate an exception stating that the amount is above the maximum for this TRC. This element should not be used if the TRC is synchronized with a Flat Amount NA earnings code.

Multiplication Factor Use this field to calculate hourly earnings, such as overtime or double time, for which the earnings are multiplied by a specific number or factor, such as 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.

Rate Adjustment Factor Use this field 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 the job record. This element is factored into the calculation of estimated gross for Hours and Units TRC types.

Flat Amount This field 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 quantity that differs from the defined Flat Amount, you can include a delivered rule in your rule program that will replace it 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 This field 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.

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TRC Category Use this field to specify whether to group this TRC in a TRC category. For example, the TRC of *REG* could be assigned to a TRC Category of *Time Worked*.

Only one category can be assigned to a TRC.

Note. This field only appears if a value of *Hours* is selected for the Type field.

In addition, on the TL Installation table, the Display Reported Hours Summary field must be selected to show TRC Categories on the Approve Payable Time page, and/or the Time Reporting page.

TRC Approval Option Use this field to indicate if time needs approval. Valid values are *None*, *Payable Time*, *Reported Time*, or *Reported and Payable Time*.

Mapping TRCs to Earning Codes

Access the Mapping to Earning 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 entered a value in the Map to NA Earnings Code field and synchronized, the system automatically populates this element. You can choose to map this TRC to several payroll systems by inserting a new row and entering the appropriate data. The values for the payroll system default from the values you set up on the 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 If you entered a value in the Map to NA Earnings Code field and synchronized, 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*, the list comes from the Payroll for North America Earnings Code table, if you selected *GP*, 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 entered a value in the Map to NA Earnings Code field and synchronized, the system automatically populates this field, making it 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.

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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 / Absence Management Field (When Absence Flag Is Selected)

Absence Take Code (Absence Management Take code)

Select the Absence Management Take Code that you want mapped to this TRC. In Absence Management (AM), 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.

Note. An active Absence Take Code should only be mapped to one TRC.

GP Earnings Code (Global Payroll earnings code)

Select the GP earnings code for mapping costs back to Time and Labor from GP.

Note. If absence event data is entered in Absence Management or Global Payroll using a Take code that is not mapped to a TRC, it does not display in the Absence grid of the Timesheet pages in Time and Labor.

Payroll for North America Field (When Absence Flag Is Selected)

Absence Earnings Code

Select the Absence earnings code that you want mapped to this TRC.

NA Earnings Code (North America earnings code)

Select the North America earnings code that you want mapped to this TRC.

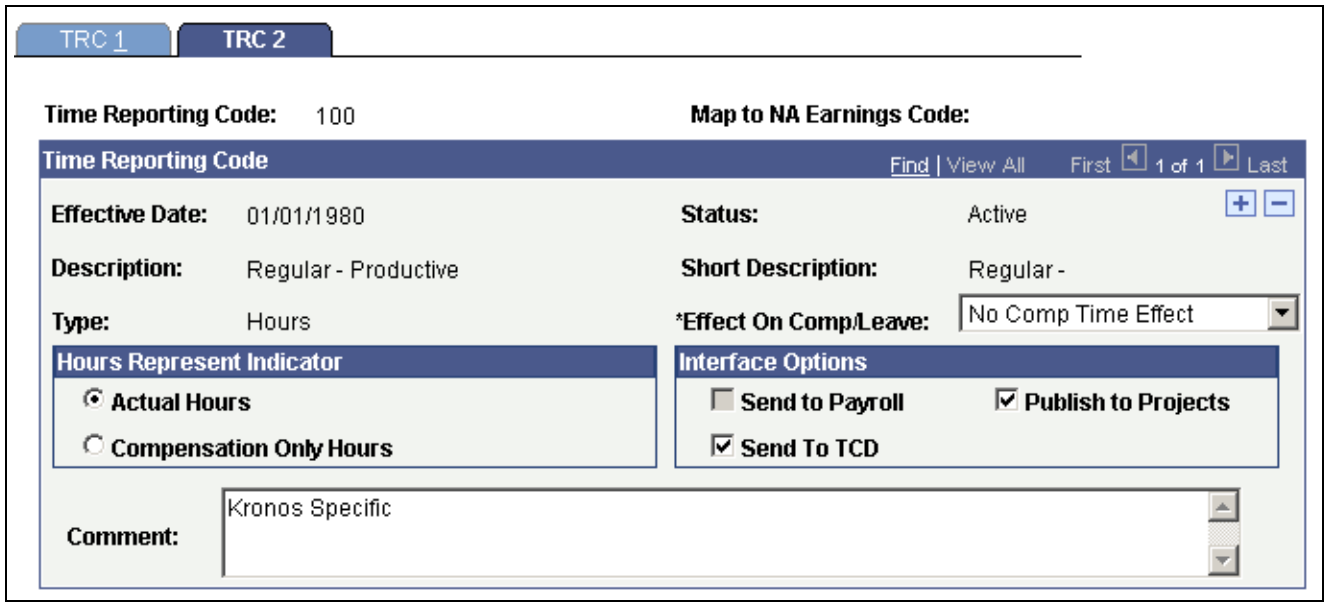
See Also

Chapter 18, “Integrating with Payroll Applications,” Integrating Time and Labor with Global Payroll, page 516

Setting Up Compensation and Interface Options

Access the TRC 2 page.

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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 that 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 eight. So, if employees work ten 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. For Units and Amount TRCs, select this option.

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 check box 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 check box selected.

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

See Chapter 5, “Establishing Workgroups,” Entering Basic Parameters, Approvals and Status, page 78.

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.

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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.

Publish to Project Costing Select this field if you want your TRC sent to the Project Costing application.

Effect on Comp/Leave Valid options are*No Comp Time Effect, Comp Time Earned, Comp Time Taken, Leave Taken* and *Avoid Replacing by Rules*:

- Select *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 *Comp Time Taken* if you chose to map to a NA earnings code that adds to gross pay.

Note. Comp Time Earned and Comp Time Taken TRCs can be associated to a Compensatory Time Off plan in order for them to be displayed in the Weekly reporting pages. They must exist in the time reporter's TRC program and assigned Comp Plan in order for compensatory time off to be validated correctly.

- Select *Leave Taken* for TRCs such as vacation, sick, or leave time. In order for the system to process Leave Time correctly, make sure you map the Leave Taken TRC to a NA Earnings code that has one of these payment types: 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.
- *Comp Time Earned, Comp Time Taken,* or *Leave Taken* TRCs must have a TRC Type of *Hours.* You cannot change these values if the TRC is attached to an active comp time plan. If the time reporter enters a negative amount for *Comp Time Earned* or *Comp Time Taken*, the system considers it an adjustment. If the Time Reporter enters a negative amount for *Comp Time Taken*, the system creates 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.
- The *Avoid Replacing by Rules* value gives users control over TRCs that should or should not be reduced as a result of daily or weekly overtime rules. Users need to change the TRCs eligible for rules processing but not eligible for reduction as a result of replacing rules (overtime, holiday , jury duty and so).

Note. If the TRC is an absence TRC, then the Effect on Comp/Leave field is set to *None*, as absences reported in Absence Management are not validated.

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.

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See Also

Chapter 16, “Using Time Collection Devices,” page 425

Defining TRC Programs

To define a TRC program, use the TRC Program (TL_TRCPGM_PNLGRP) and the Copy TRC Program (TL_TRC_SAVE_PNLGRP) components. Use the TL_TRCPGM_PNLGRP component interface to load data into the tables for the TRC Program (TL_TRCPGM_PNLGRP) component.

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.

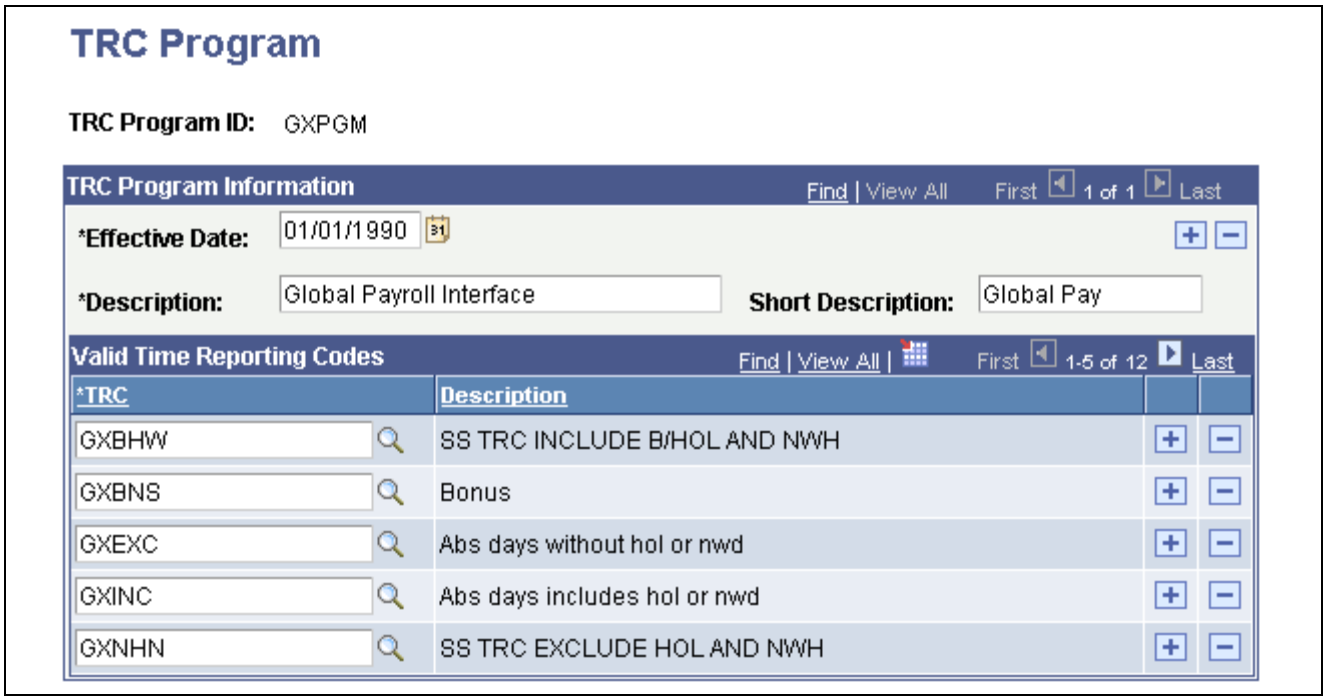
Pages Used to Define a TRC Program

Page Name	Object Name	Navigation	Usage
TRC Program	TL_TRC_PGM_PNL	Set Up HRMS, Product Related, Time and Labor, Time Reporting, TRC Program, TRC Program	Define TRC’s that will belong to a TRC Program.
Copy TRC Program	TL_TRC_SAVE_AS_PNL	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Copy TRC Program, 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.

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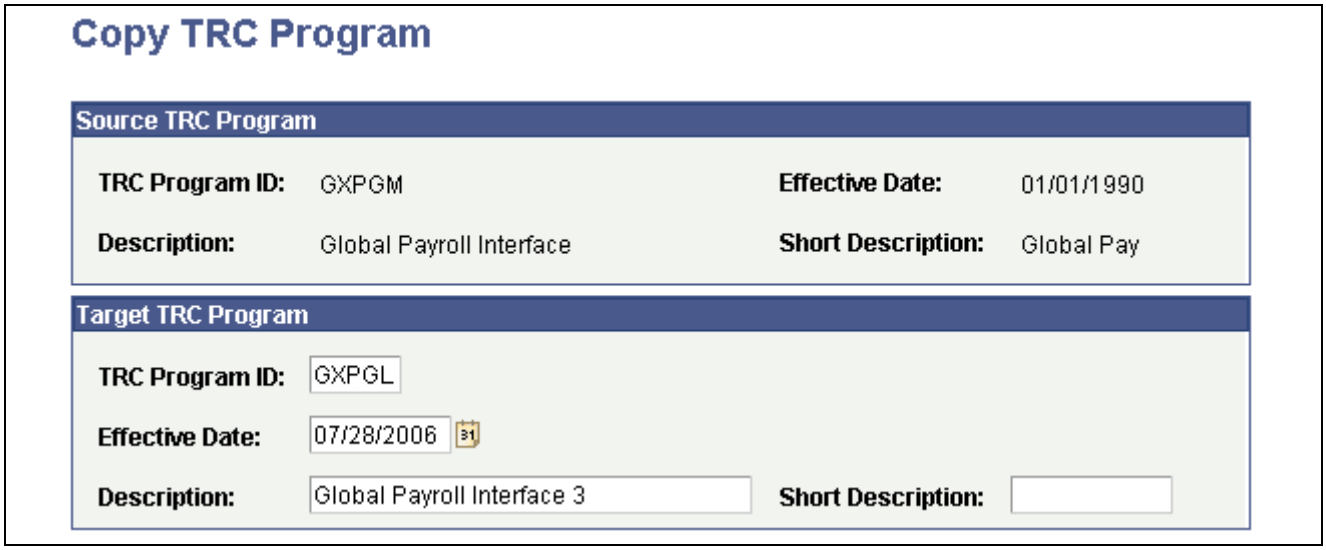


TRC Program page

TRC Select the TRCs valid for this TRC program. You will assign the TRC program to a workgroup. Keep adding rows and TRCs until you have entered all the TRCs valid for this TRC program.

Copying a TRC Program

Access the Copy TRC Program page.



Copy TRC Program page

Source TRC Program

The Source TRC Program group box displays the TRC Program ID, from which you want to copy values for your target TRC program, the Effective Date and Description.

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Target TRC Program

TRC Program ID Enter a new 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

To define units of measure, use the Unit of Measure (TL_UNITS_PNLG) component.

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

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

You determine whether to display the fields on the Units of Measure page by selecting or clearing 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

Chapter 4, “Setting Up Basic Tables,” Setting Up System Defaults and Loading Dates, page 26

Page Used to Define Units of Measure

Page Name	Object Name	Navigation	Usage
Unit of Measure	TL_UNITS_PNL	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Unit of Measure, Unit of Measure	For clients who do not interface to PeopleSoft Enterprise Project Costing, use this page to establish Unit of Measure values. For clients who interface to Project Costing, use this page to view Unit of Measure values established in your Project Costing application. If you are using Project Costing, the values for Unit of Measure will automatically be populated for you through Integration Broker, with the UOM_FULLSYNC message.

Naming Units of Measure

Access the Unit of Measure page.

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

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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

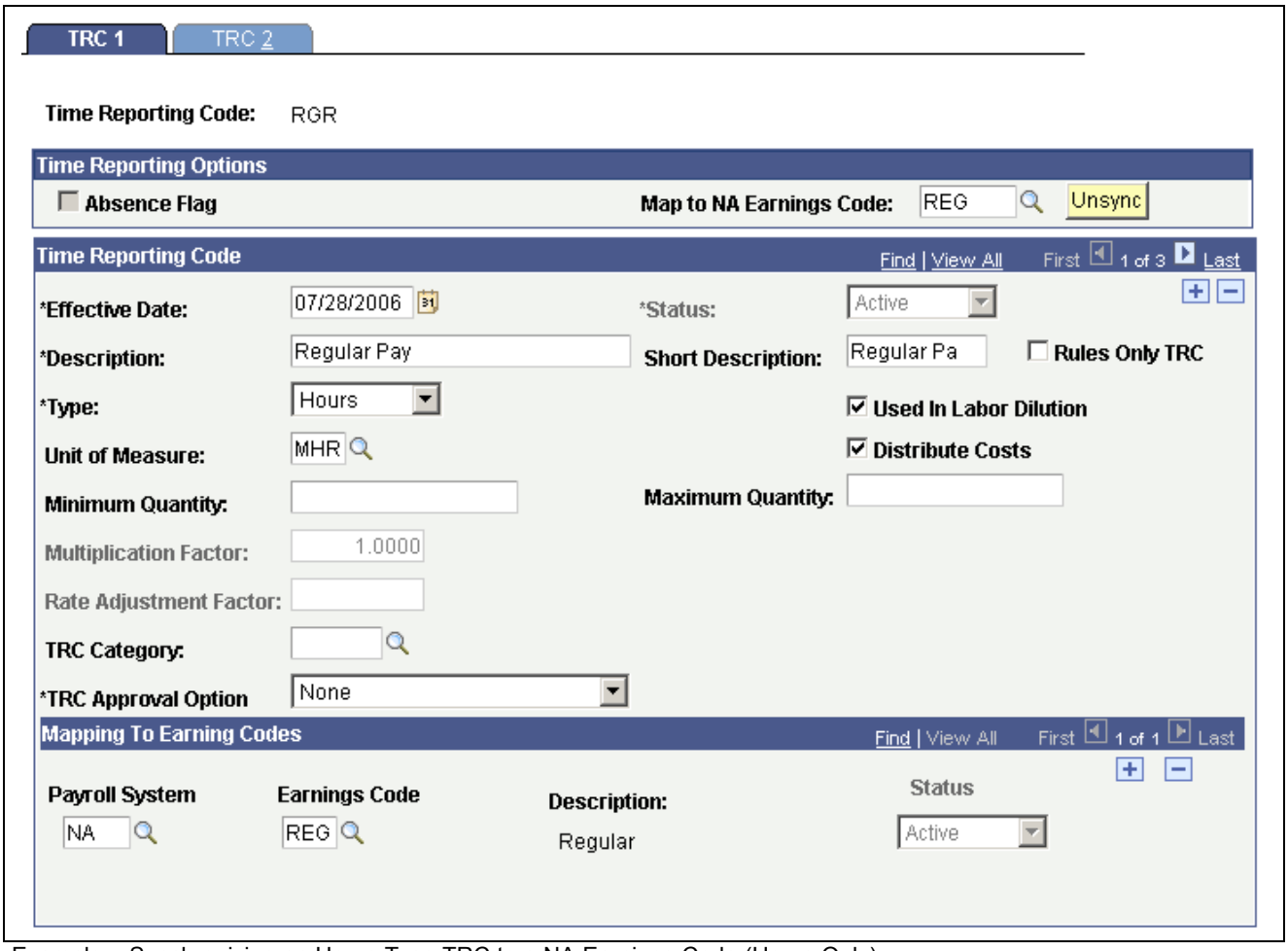
To synchronize an hours type TRC (RGR) to a NA earnings code (hours only) of REG:

- 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 the current date.
- In the Description field, 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 check box. 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 Sync button. You will receive the following message:

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

You now have 2 rows for the TRC, one for the current date and one with the date of the NA earnings code.

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Example – Synchronizing an Hours Type TRC to a NA Earnings Code (Hours Only)

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

To synchronize 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 7/17/2002
- In the Type field, select *Units*.

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- Select *Square Mile* as the Unit of Measure.
- 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 7/17/2002 and one for date of the NA earnings code for 1/1/1980.

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

To synchronize 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 7/17/2002.
- Create a new TRC called *ONCAL* with an effective-dated row of 7/17/2002.
- 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.

There is only one effective-dated row for 7/17/2002, 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

Chapter 18, “Integrating with Payroll Applications,” Labor Distribution and Dilution, page 503

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CHAPTER 7

Defining Task Reporting Requirements

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

- Create task templates.
- Define and view task values in Time and Labor.
- Display task codes defined in PeopleSoft Project Costing and PeopleSoft Enterprise Performance Management.
- Create task profiles.
- Define taskgroups.

Understanding Task Reporting Requirements

With 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

Chapter 15, "Reporting Time," Creating Time Reporting Templates, page 408

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.

Understanding Task Reporting Tools

You will use a group of task oriented tools to define your organization's task reporting requirements:

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

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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, combo 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 Project Costing 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 or allocate − 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

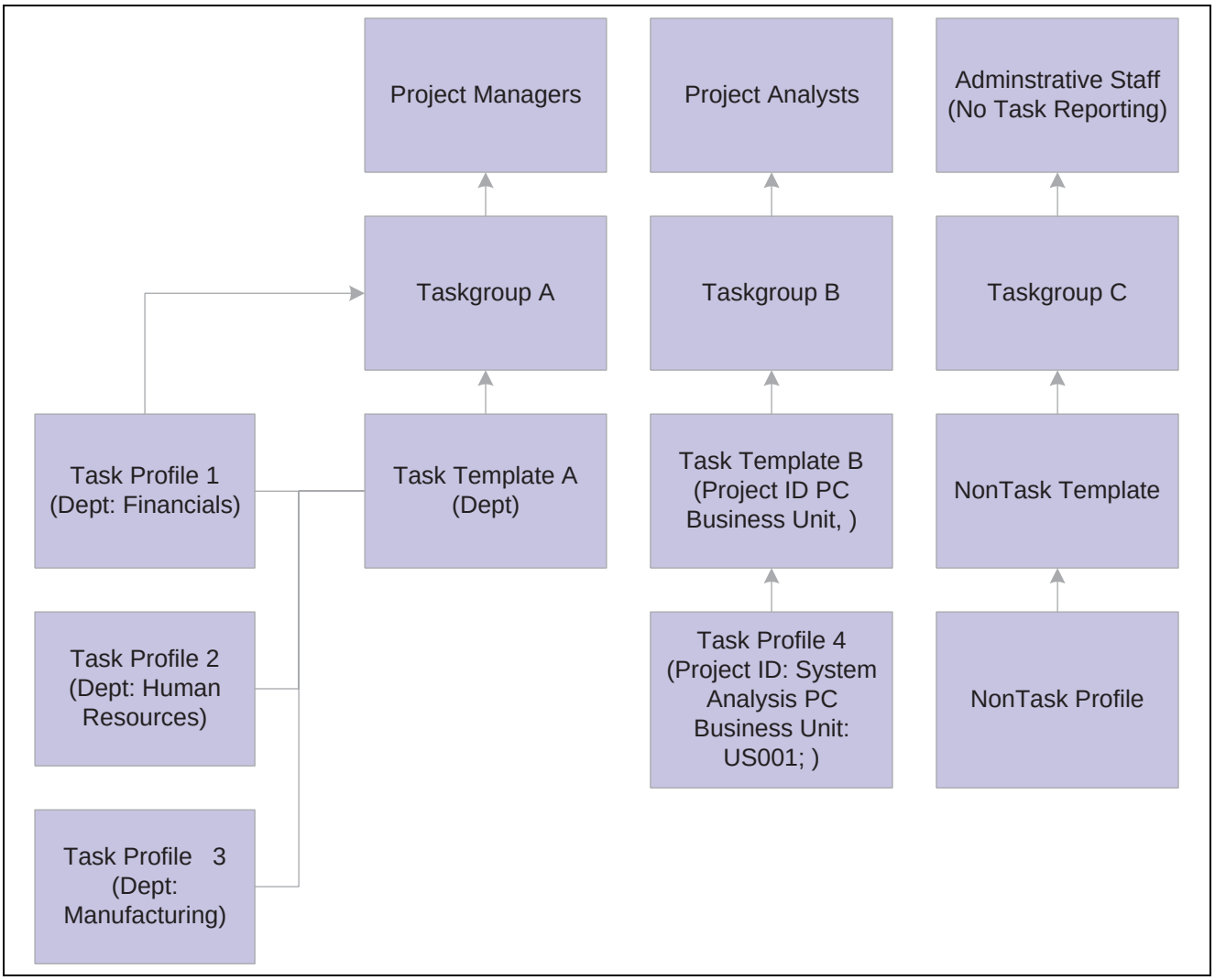
A taskgroup identifies the valid, default time reporting templates, task template, and task profile(s) for time reporters with the same task reporting requirements. Each time reporter must be associated with one taskgroup, but the taskgroup assignment can be overridden when reporting time.

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.

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

Understanding Types of Task Reporting

Time and Labor supports two types of task reporting:

- Task profile reporting.

  When a time reporter uses task profile reporting (in essence an automatic allocation), 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.

- Task template reporting.

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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.

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. 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

Chapter 15, "Reporting Time," Creating Time Reporting Templates, page 408

Chapter 7, "Defining Task Reporting Requirements," Defining Taskgroups, page 156

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 Time and Labor; other tables are created in Human Resources Management, Project Costing, and PeopleSoft Enterprise Performance Management.

This section discusses where the values for each task-related prompt table are defined.

Understanding Where Prompt Tables are Defined

This table shows which PeopleSoft application you use to define task data used by Time and Labor. Notice that a few of the task elements (activity, projects, and business unit) can be defined in more than one application.

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Application	Fields
HR Entities	Company HR Business Unit Location HR Department Jobcode Position Number
HR & TL Entities	Customer Task TL Product TL Project TL Activity
User Entities	User Fields 1 to 5
Financials Entities	Combo Code Account Alternate Account Operating Unit Fund Code GL Department Program Code Class Field Budget Reference Product Project / Grant Affiliate Fund Affiliate Operating Unit Affiliate Chartfield 1 Chartfield 2 Chartfield 3

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Application	Fields
EPM Entities	Business Unit PF Activity FS
PC Entities	PC Business Unit Project ID Activity Resource Type Resource Category Resource Subcategory

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 (Project Costing 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	Set Up HRMS, Foundation Tables, Organization, Company
HR Business Unit	BUS_UNIT_TBL_HR	Set Up HRMS, Foundation Tables, Organization, Business Unit
Location	TL_LOCATION_VW	Set Up HRMS, Foundation Tables, Organization, Location Task values are based on setID for HR business unit.
Department ID	TL_DEPT_TBL_VW	Set Up HRMS, Foundation Tables, Organization, Departments Not applicable when using commitment accounting. Task values are based on setID for HR business unit.
Jobcode	TL_JOBCODE_VW	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table Task values are based on setID for HR business unit.

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Task Entity	Table	Navigation
Position Number	POSITION_DATA	Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info
Product	TL_PRODUCT_TBL	Set Up HRMS, Product Related, Time and Labor, Task Elements, Product Not applicable if combo code is enabled and product is an active ChartField
Customer	TL_CUSTOMER	Set Up HRMS, Product Related, Time and Labor, Task Elements, Customer
Combo Code	TL_ACCTCD_BU_VW	Set Up HRMS, Common Definitions, ChartField Configuration, ChartField Transaction Table
Business Unit PC	TL_BUS_CA_PC_VW	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Business Unit Used only if Project Costing 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Business Unit PF Used only when Performance Management is installed and Project Costing is not.

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Task Entity	Table	Navigation
Project	PROJ_TEAM_DVW	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Project Used when Project Costing installed, combo code is not enabled or project is not an activated ChartField, 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Project Used when Project Costing is not installed and project is not an active ChartField..
Activity	TL_PROJ_ACTV_VW	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Activity ID Used when Project Costing is installed. Choices are restricted to active activities.
	TI_FS_ACTV_VW	Set Up HRMS, Product Related, Time and Labor, Task Elements, Activity ID Used when Performance Management is installed and Project Costing is not. Choices are restricted to active activities.
	TL_ACTIVITY	Set Up HRMS, Product Related, Time and Labor, Task Elements, Activity ID Used when neither Project Costing nor Performance Management is installed. Choices are restricted to active activities.

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Task Entity	Table	Navigation
Resource Type	TL_PROJ_RTYPE_V	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Type Used only when Project Costing is installed.
Resource Category	TL_PROJ_CATG_V2	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Category Used only when Project Costing 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Subcategory Used only when Project Costing 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Task
User Fields 1 - 5	TL_USER_FIELD_1-5	Set Up HRMS, Product Related, Time and Labor, Task Elements, User Field1-5

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Note. If you are not using Project Costing or 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.

Using ChartFields in Time and Labor

This section provides a brief overview of ChartFields and discusses the:

- Configuration and integration.
- Impact on task templates.
- Impact on time reporting pages.
- ChartField storage in reported time and task profile.
- ChartField storage in payable time.
- Time and Labor validation options.

ChartFields are fields used to report General Ledger charts of accounts with transactional data. These accounts determine the logging of transactions and the tracking of information for General Ledger purposes. ChartFields allow you to report up to 16 chart of accounts when entering transactional data. Both Commitment Accounting and Non-Commitment Accounting customers can utilize the ChartField functionality for their business processes.

Configuration and Integration

You can configure and activate all or a subset of the 16 ChartFields using the Standard ChartField Configuration page. The Standard ChartField Configuration page allows you to activate, change the order of display, relabel the fields and change the field length displayed for the individual ChartFields.

If you integrate HCM database with PeopleSoft General Ledger (GL), then you also configure the Standard ChartField Configuration that is owned by PeopleSoft Financial Management Systems (FMS). This configuration is defined and sent to HCM via Integration Broker. Any changes must be made directly in the FMS database and then sent to HCM.

If the HCM database is not integrated with PeopleSoft General Ledger, but you still want to enter ChartField values, then the Standard ChartField Configuration is accessible and can be updated directly. This may be used to capture chart of account values to send to a third party GL application or to just capture these details for HCM purposes. No matter where the configuration is entered, once you press the Apply button and the application engine runs, the pages displaying ChartFields will reflect the configured display.

Note. Changes to the ChartField Standard Configuration may require updates to existing task templates. Existing task templates that have combo code enabled should be opened and re-saved. This will trigger the association of the active ChartFields, from the ChartField Standard Configuration, with the combo code field.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Working with ChartFields and ChartField Combinations”.

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Impact on Task Template

After you press the Apply button on the Standard ChartField Configuration page, the impact to Time and Labor (TL) begins with the task template. The task template reflects the activated ChartField values when combo code is an enabled field. For example, if the Standard ChartField Configuration has activated GL account, department and project, and the application engine (using the Apply button) has been run, then the enabling of combo code field on the task template also enables the GL account, department and project as individual ChartField values.

When the system enables the combo code on the task template, the HR business unit is also enabled. The reason is in order to validate the combination of individual ChartField values, associated with a new or existing combo code, a GL business unit is required. HR business units are mapped to GL business units through the GL/HR Business Unit Mapping page (Setup HRMS, Common Definitions, ChartField Configuration, GL/HR Business Unit Mapping). With this mapping, when a HR business unit is reported then the GL business unit can be derived and validation performed. If a HR business unit is not mapped to a GL business unit, an error message will display. This error message will be triggered online, at the point of validation, or during validation in the Submit Time application process.

The TL Product and TL Project fields are available to be enabled on the task template depending on the Standard ChartField Configuration and the integration with PS/Projects and PS/EPM. The chart below describes when the fields are available and when they are not.

PRODUCT	TL_Product Available
Combo Code is enabled and Product is an active ChartField.	N
Combo Code enabled and Product is an inactive ChartField.	Y
Combo Code is not enabled.	Y

PROJECT	TL_Project Available
Combo Code is enabled and Project is an active ChartField. Integrate with PS/Projects is enabled.	N
Combo Code is enabled and Project is an active ChartField. Integrate with PS/Projects is NOT enabled.	N
Combo Code enabled and Project is an inactive ChartField. Integrate with PS/Projects is enabled.	N
Combo Code enabled and Project is an inactive ChartField. Integrate with PS/Projects is NOT enabled.	Y
Combo Code is not enabled and Integrate with PS/Projects is enabled.	N

ACTIVITY	TL_ACTIVITY Available
PS/Project installed	N

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ACTIVITY	TL_ACTIVITY Available
PS/EPM installed	N
PS/EPM and PS/Projects are not installed	Y

Impact on Time Reporting Pages

In Time and Labor, the system prepopulates the HR business unit on the transaction pages based on the User ID and the default HR business unit from the JOB record. This value can be overwritten to reflect the user preference when entering transactional details, but to ensure that a HR business unit is reflected for combo code validation, the system performs the prepopulation process.

Task reporting, on transaction rows, is driven by the taskgroup selected (either through default or borrowing). When reporting time, the ChartField page appears on the self-service pages if a taskgroup is associated with a task template that has combo code enabled . The ChartField page displays the combo code field and any associated individual ChartField values. You then have the option to enter a combo code, the individual ChartField values, or a combination of both.

When you use the prompt for combo code, and you select a value, the page will display the combo code and all individual associated ChartFields. If individual ChartField values are entered, validation is done for each value initially and then the combination is also validated and stored as a combo code.

Example: Combo Code – XYZ has associated ChartField values of: Account = 600020, Department = 14000, Product = HARDWR

If you enter the combo code value of *XYZ* when you tab out of the field: Account, Department and Product will be populated with the associated values shown above.

If you enter Account = 600020, Department = 11000 and Product = HARDWR, and this combination has not previously been used, then upon save and validation of the combination a new combo code will be generated and displayed.

Chartfield Storage on Reported Time and Task Profile

The storage of ChartFields in reported time (TL_RPTD_TBL) and the task profile (TL_TSKPRF_DETL) are exactly the same. Individual ChartField values are entered on these pages and are then saved and stored as a combo code. When you reenter the online pages, the individual ChartField values, associated to the stored combo code, are derived and displayed.

The system stores a *product* value on the Reported Time table or Task Profile if product is *not* an active ChartField. In this case the stored product value is associated with the TL_PRODUCT table.

The system stores a *project* value on the Reported Time table or Task Profile is associated with either:

- the PROJECT table if the Integration with PS/Projects is enabled on the TL Installation page, or
- the TL_PROJECT table if project is *not* an active ChartField and Integration with PS/Projects is *not* enabled on the TL Installation page.

Chartfield Storage on Payable Time

Payable Time table (TL_PAYABLE_TIME) stores both the combo code and individual ChartField values because ChartField integration with Global Payroll and Payroll for North America are handled differently.

Global Payroll pulls the individual ChartField values (a GP configured set, up to 8 values) and uses them when processing payroll and then these values are sent to General Ledger.

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Payroll for North America only pulls the combo code used for payroll processing. When payroll completes, and the transactions are being sent to General Ledger, Payroll for North America resolves the individual ChartField values associated to the combo code to send these with the transaction information.

The values for *Product* and *Project* are stored in payable time and reflect values that come from either the Product/TL_Product table or Project/TL_Project table. The task template associated with the reported taskgroup drives this.

If the task template has TL_Product enabled then the value stored in payable time is associated with the TL_Product table. If not then the value is associated with the Product table.

If the task template has *TL_PROJECT* enabled then the value stored in payable time is associated with the TL_Project table. If not then the value is associated with the Project table.

All combo codes generated in HCM will be stored on the ACCT_CD_TBL. This table stores the generated combo codes along with the associated individual values.

Time and Labor Validation Options

On the Time and Labor Installation page there are three options for ChartField validation.

Sync Message This option sends a message with ChartField data to FMS and receives a response of valid or not.

Table Validation This option uses the Valid Combo Table to allow or deny a combination of individual ChartField values.

None This options allows you to turn off validation for Time and Labor transactions.

Note. If you set the validation option to *None,* then only individual ChartField values will be validated and not the combination. If a combo code is generated without an associated GL Account, and this combo code is used in the integration with Payroll for North America, the associated transaction will fail when sent to General Ledger. In this case users that are integrating with Payroll for North America should always enter a *GL_Account* value even if the validation option is set to *None.*

GL Account is a required field when sending transactional data to General Ledger from any feeder system. Validations performed using Integration Broker or the Table Validation always require you to enter a GL Account value (at minimum).

Understanding Task Reporting with PeopleSoft Financials

PeopleSoft Financials enables task reporting in the following areas:

Project Costing

When you integrate Time and Labor with Project Costing, 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 Project Costing, and by resource type, resource category, and resource subcategory. Valid values for these task entities come directly from Project Costing through Integration Broker and can be viewed through the following pages in Time and Labor:

- PC Business Unit page.
- PC Project page.

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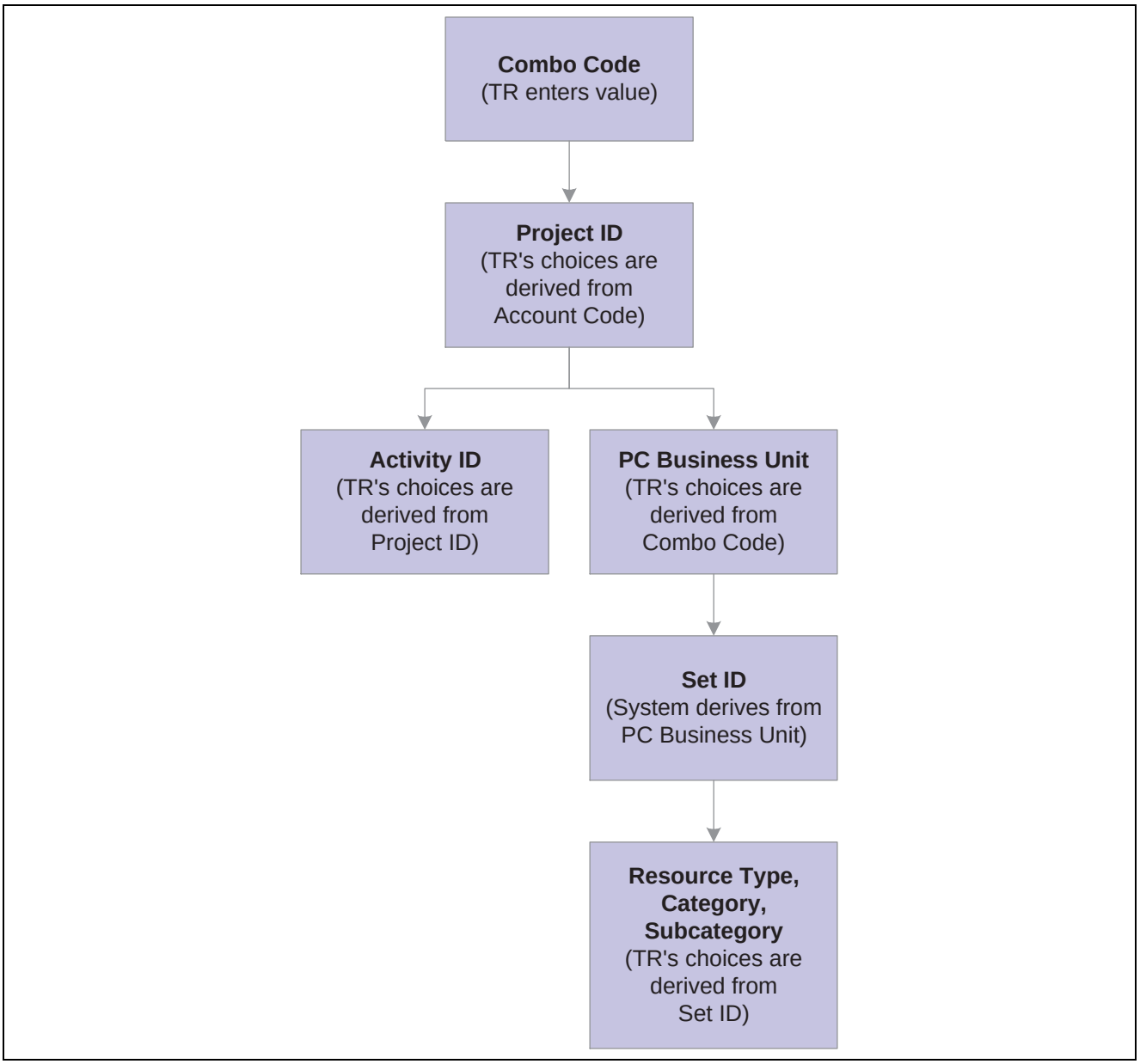
- PC Activity ID page.
- Resource Type page.
- Resource Category page.
- Resource Subcategory page.

Project Costing with Combo Code

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, combo code becomes an enabled task entity. When a combo code is entered during time reporting, two things happen:

- Based on the combo code, Time and Labor automatically populates up to sixteen related ChartFields: Account, Fund, DeptID, Program Code, Class Field, Affiliate, Operating Unit, Alternate Account, Project/Grant, Product, Budget Reference, Fund Affiliate, Operating Unit Affiliate, and ChartField 1–3.
- The values of several other task entities are derived from the combo code and from integration with Project Costing. The hierarchy the system follows to derive values for related task entities is illustrated below.

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

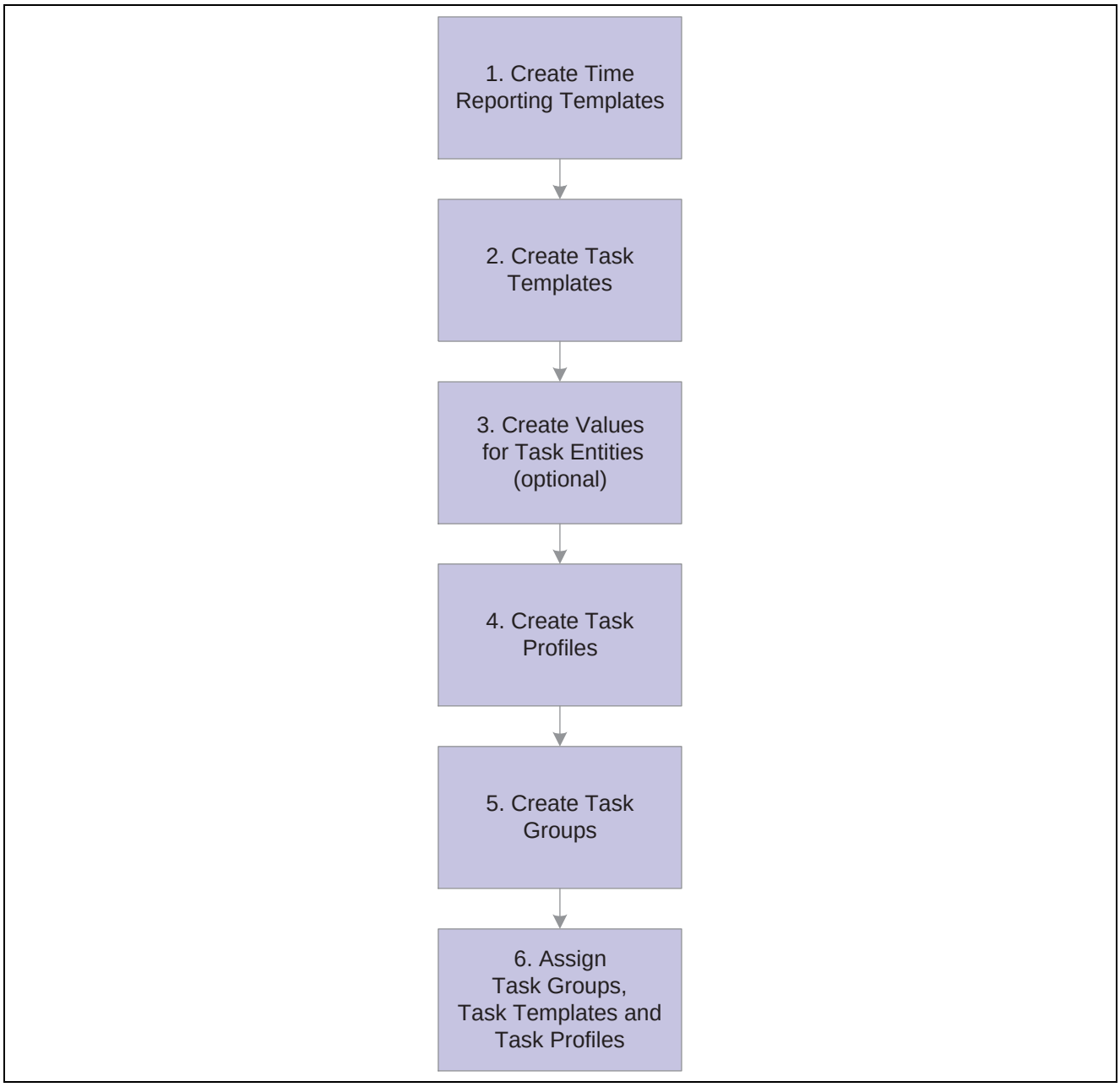
See Also

Chapter 19, “Integrating with PeopleSoft Financials and Enterprise Performance Management,” page 527

Understanding the Sequence for Defining Task Functionality

This flowchart illustrates the sequence of steps necessary to define your task reporting requirements. We discuss each of these steps briefly in this section.

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Defining Task Functionality steps

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.

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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 Project Costing is integrated with Time and Labor, the Project Costing application uses Integration Broker 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

Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206

Chapter 16, "Using Time Collection Devices," page 425

Creating Task Templates

To create task templates, use the Task Template (TL_TSKPRF_TMPLATE) component. Use the TL_TSKPRF_TEMPLATE component interface to load data into the tables for this component.

Use task templates to select the types of task information you want taskgroup members to provide when reporting time.

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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.

See Also

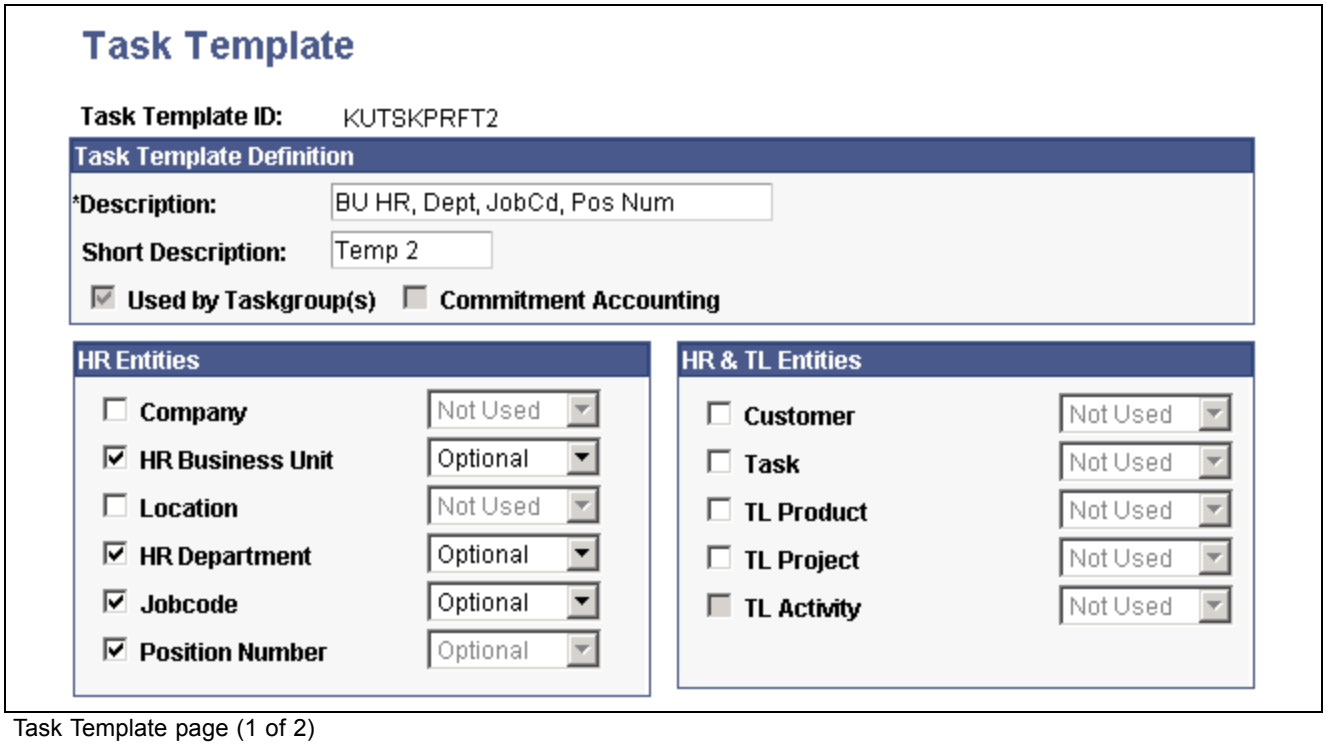
Appendix C, "Referential Integrity," page 735

Page Used to Create Task Templates

Page Name	Object Name	Navigation	Usage
Task Template	TL_TSKPRF_TMPLATE	Set Up HRMS, Product Related, Time and Labor, Task Configurations, Task Template, 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.

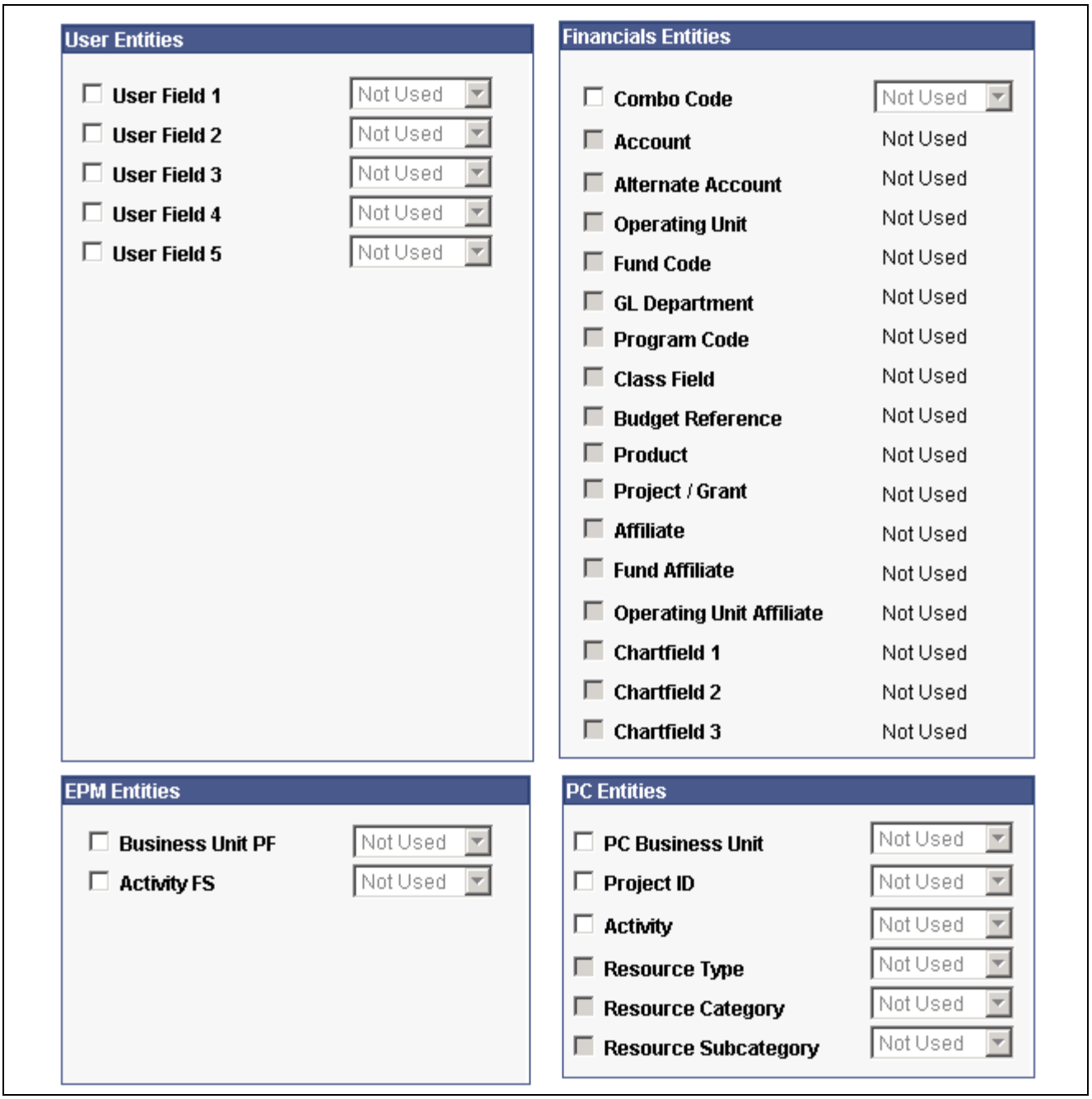
Creating a Task Template

Access the Task Template page.



Task Template page (1 of 2)

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Task Template page (2 of 2)

Task Template ID This field displays the name of the task template.

Used by Taskgroup(s) 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 has been configured to use referential integrity (the Referential Integrity option on the Time and Labor Installation page is selected) you can add optional fields to the template and change required fields to optional.

If the system is not using referential integrity, you can make any changes to the template except change the commitment accounting option.

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Commitment Accounting Select this check box if your organization uses commitment accounting. If selected, combo code becomes an enabled field, and the Product and Project ID fields become unavailable.

If Interface with PS/EPM is selected on the Time and Labor 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 Entities, HR & TL Entities, Financials Entities, User Entities, EPM Entities, and PC 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 Project Costing (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.

HR Entities

Company Always available. When you select this check box, the default value is *Optional.*

HR Business Unit When selected, HR Business Unit defaults to *Optional.* The check box is selected automatically when you select Location, Department ID, Jobcode or Combo Code. If you make any of these fields required, HR Business Unit is also required.

The HR Business Unit is required to derive the GL Business Unit for validation of combo code.

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.

HR Department Not available when using commitment accounting. (Time and Labor automatically determines the correct HR department based on the combo code.) In all other cases, HR Department defaults to *Optional* when selected. HR Department is dependent on HR Business Unit. When you select HR Department, the system automatically selects HR Business Unit 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.*

HR & TL Entities

Customer Always available. When selected, Customer defaults to optional.

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Task Always available. When selected, Task defaults to optional.

TL Product Available if Product is not an active ChartField or if combo code is not selected.

TL_Project Available if PS Projects is not installed and project is not an active ChartField.

TL Activity Available if PS Projects and PS EPM are not installed.

Financials Entities

Combo Code Automatically selected as an enabled field when commitment accounting is in use. In all other cases, Combo Code is available and defaults to *Optional* when selected.

EPM Entities

Business Unit PF Available only when Interface with PS/EPM is selected on the Time and Labor Installation page and the PC Business Unit on the Task Template page is not selected.

If Interface with PS/EPM is selected on the Time and Labor 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).

Activity FS If enabled will also enable Business Unit PF.

PC Entities

PC Business Unit Available only when Interface with PS/Projects is selected on the Time and Labor 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.

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 Time and Labor 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:

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When Interface with PS/Projects or Interface with PS/EPM is selected on the Time and Labor 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 Time and Labor 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, Time and Labor automatically adjusts the prompts for these fields according to the dynamic edit options defined for the PC business unit in Project Costing. 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 Time and Labor 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 Time and Labor 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.*

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 has referential integrity selected on the Time and Labor Installation page. The table below shows the restrictions that are in place to enforce referential integrity.

Referential Integrity?	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.

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Referential Integrity?	Template Assigned to Taskgroup?	Changes 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.

Note. Anytime the ChartField Standard Configuration is modified, and changes have been applied to the database, it is necessary to open all task templates that have combo code (ACCTCD_FLAG field) enabled and save the page. This will refresh the ChartField values associated with the combo code in the TL_TSKPRF_TMPLT record.

See Also

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Using Time and Labor with Commitment Accounting, page 540

Defining and Viewing Task Values in Time and Labor

To define or view task values, use the Customer (CUSTOMER), Task (TASK), Product (PRODUCT1), Project (PROJECT1), Activity ID (ACTIVITY_ID), and User Field 1 (TL_USER_FLD1_PNLG) components. Use the CUSTOMER, TASK, PRODUCT1, PROJECT1, ACTIVITY_ID, and TL_USER_FLD1_PNLG component interfaces to load data into the respective tables for these components.

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

- Time and Labor pages used to define task values.

  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 Project Costing and Performance Management.

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Pages Used to Define and View TL Entities

Page Name	Object Name	Navigation	Usage
Customer	TL_CUSTOMER	Set Up HRMS, Product Related, Time and Labor, Task Elements, Customer, 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Task, 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, Product, 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.
Project	TL_PROJECT	Set Up HRMS, Product Related, Time and Labor, Task Elements, Project, Project	If you're using Time and Labor without Project Costing, use the Project page to create and view codes for projects.
Activity ID	TL_ACTIVITY	Set Up HRMS, Product Related, Time and Labor, Task Elements, Activity ID, Activity ID	If you are using Time and Labor without Project Costing or 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	Set Up HRMS, Product Related, Time and Labor, Task Elements, User Field 1, User Field 1	Use the User Fields page to create your custom task-reporting elements.

Creating and Viewing Codes for Project Costing

Access the Project page.

The page you use to create project codes depends on whether Project Costing is integrated with Time and Labor:

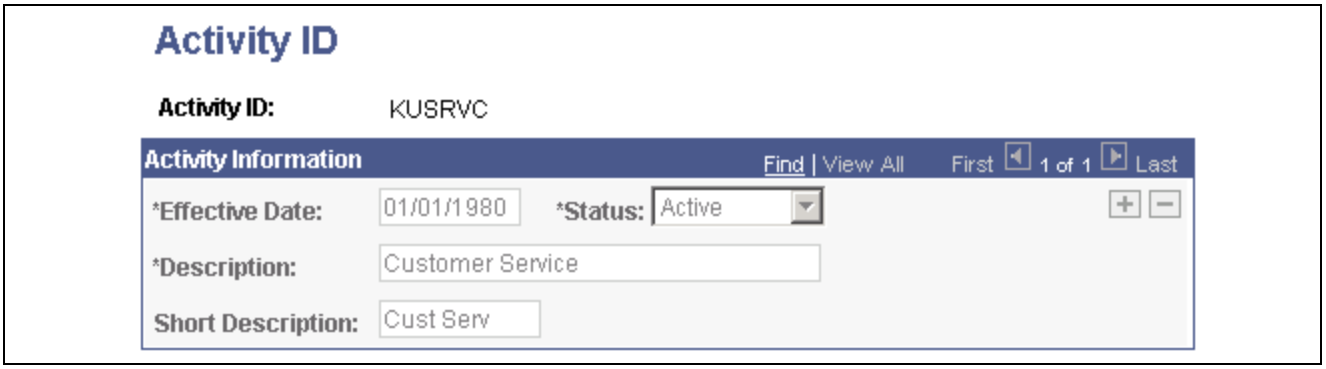
- If you're using Time and Labor without Project Costing, use the Project page to create project codes.

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- If you're using Project Costing, define project codes in the Project Costing application. You can then use the PC Project Descr page in Time and Labor to view the codes but not to change them.

Creating and Viewing Activity ID Codes

Access the Activity ID page.



Activity ID page

The page you use to create activity codes depends on whether Project Costing and/or Performance Management are integrated with Time and Labor.

- If you're using Time and Labor without Project Costing or Performance Management, use the Activity ID page to create activity codes.
- If you're using Project Costing, you define activity codes in that application. You can then use the PC Activity ID pages in Time and Labor to view the codes but not to change them.
- If you're using Performance Management (without Project Costing) you define activity codes in the Enterprise Performance Management application. You can then use the View FS Activity page in Time and Labor to view the codes but not to change them.

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 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.

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

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Displaying Task Codes Defined in Project Costing and Performance Management

To display task codes for Project Costing and Performance Management, use the PC Business Unit (TL_BUS_UNIT_TBL_PC), PC Project (PROJECT1_PC), PC Activity ID (PC_PROJ_ACTIVITY), Resource Type (PROJ_RES_TYPE), Resource Category (PROJ_CATG_DEFN), Resource Sub-Category (PROJ_SUBCAT_DEFN), Business Unit PF (TL_BUS_UNIT_TBL_PF), and FS Activity (FS_ACTIVITY_TBL) components.

Prompt tables defined in Project Costing and/or Performance Management are available to Time and Labor through our Publish and Subscribe technology. If you're using Project Costing or Performance Management, you can view the prompt values in Time and Labor but not change them. To add or delete values, you must update the appropriate Project Costing or Performance Management page.

See Also

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," page 527

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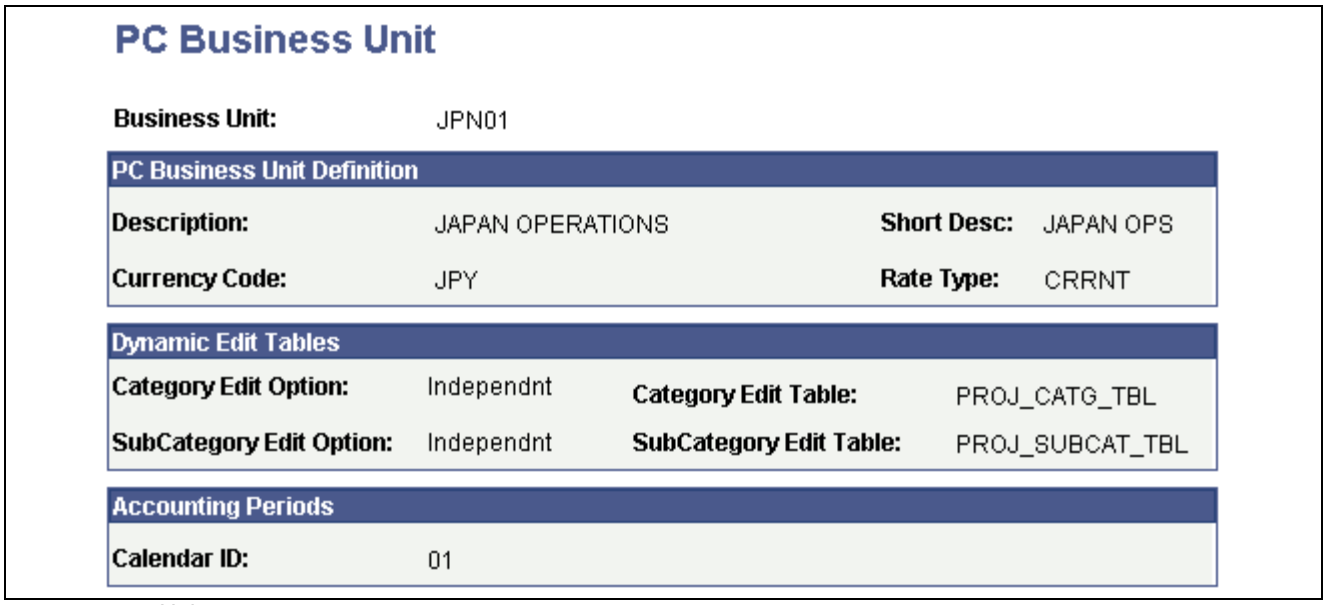
Pages Used to Display Task Codes in Project Costing and Enterprise Performance Management

Page Name	Object Name	Navigation	Usage
View Business Unit PC	TL_BUS_UNIT_TBL_PC	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Business Unit, PC Business Unit	Display business unit criteria defined through Project Costing.
PC Project Descr	TL_PROJECT_PC	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Project, PC Project	Display project codes defined through Project Costing.
Team Members	PROJECT_TEAM_01	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Project, Team Members	Display project information created through Project Costing.
View Project Activity	PC_PROJ_ACTIVITY	Set Up HRMS, Product Related, Time and Labor, Task Elements, PC Activity ID, View Project Activity	View the activity codes defined in Project Costing.
View Project Resource Type	PROJ_RES_DEFN	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Type, View Project Resource Type	View resource type codes defined in Project Costing,
View Project Resource Category	PROJ_CATG_DEFN	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Category, View Project Resource Category	View resource category codes defined in Project Costing,
View Project Resource Sub Catg	PROJ_SUBCAT_DEFN	Set Up HRMS, Product Related, Time and Labor, Task Elements, Resource Sub-Category, View Project Resource Sub Catg	View resource subcategory codes defined in Project Costing,
View Business Unit PF	TL_BUS_UNIT_TBL_PF	Set Up HRMS, Product Related, Time and Labor, Task Elements, Business Unit PF, View Business Unit PF	View business unit codes defined in Performance Management.
View FS Activity	FS_ACTVITY_TBL1	Set Up HRMS, Product Related, Time and Labor, Task Elements, FS Activity, View FS Activity	View activity codes defined in Performance Management.

Displaying Business Unit Information

Access the PC Business Unit page.

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PC Business Unit page

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

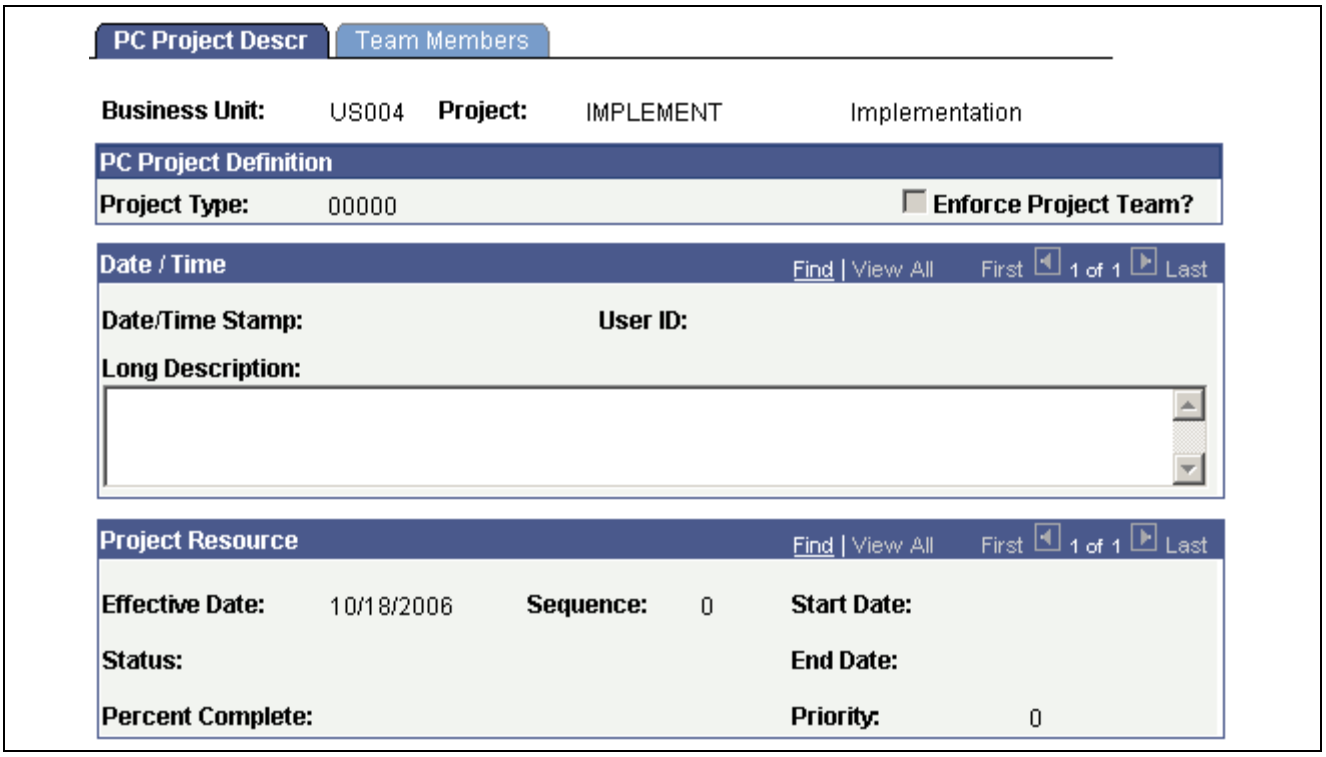
See Also

PeopleSoft Enterprise Project Costing 9.0 PeopleBook

Displaying Project Codes

Access the PC Project Descr page.

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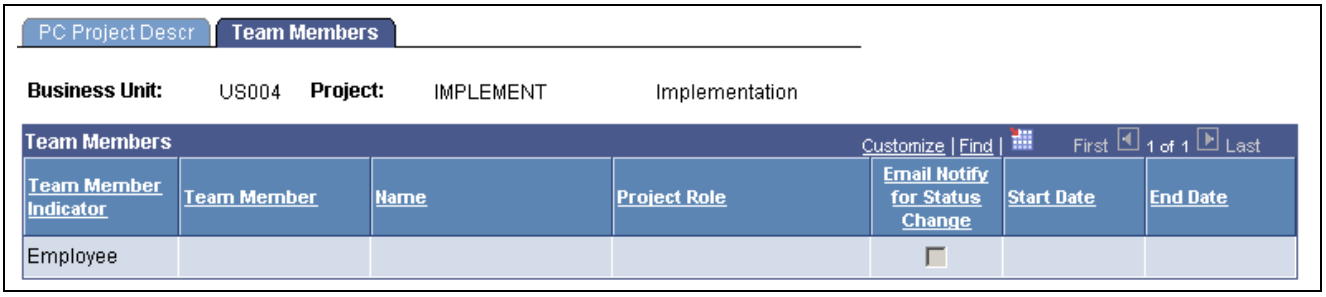
PC Project Descr page

See Also

PeopleSoft Enterprise Project Costing 9.0 PeopleBook

Displaying Project Information on the Team Members Page

Access the Team Members page.



Team Members page

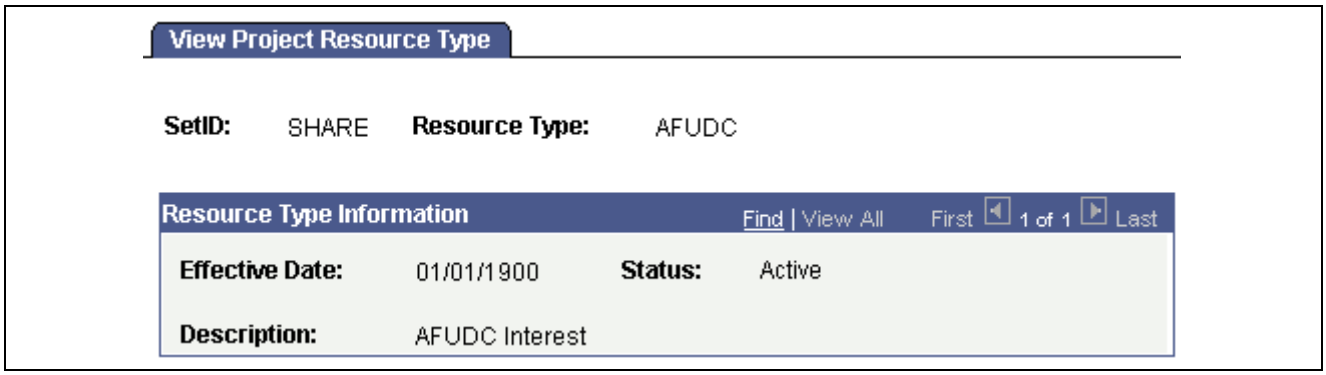
See Also

PeopleSoft Enterprise Project Costing 9.0 PeopleBook

Displaying Resource Type Codes

Access the View Project Resource Type page.

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View Project Resource Type page

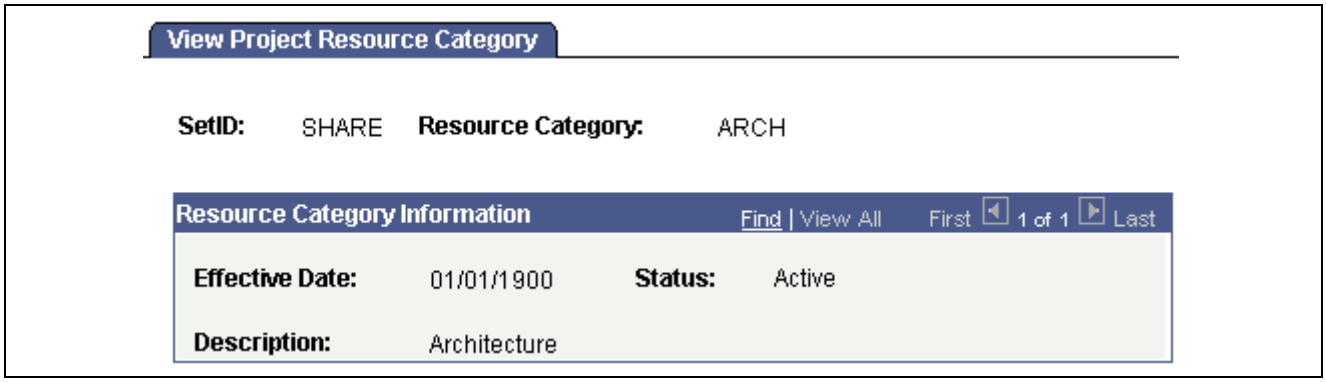
Resource type codes are applicable only if you are using Project Costing. You can use the Resource Type page to view any resource codes defined in Project Costing but not to update them.

See Also

PeopleSoft Enterprise Project Costing 9.0 PeopleBook

Displaying Resource Category Codes

Access the View Project Resource Category page.



View Project Resource Category page

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

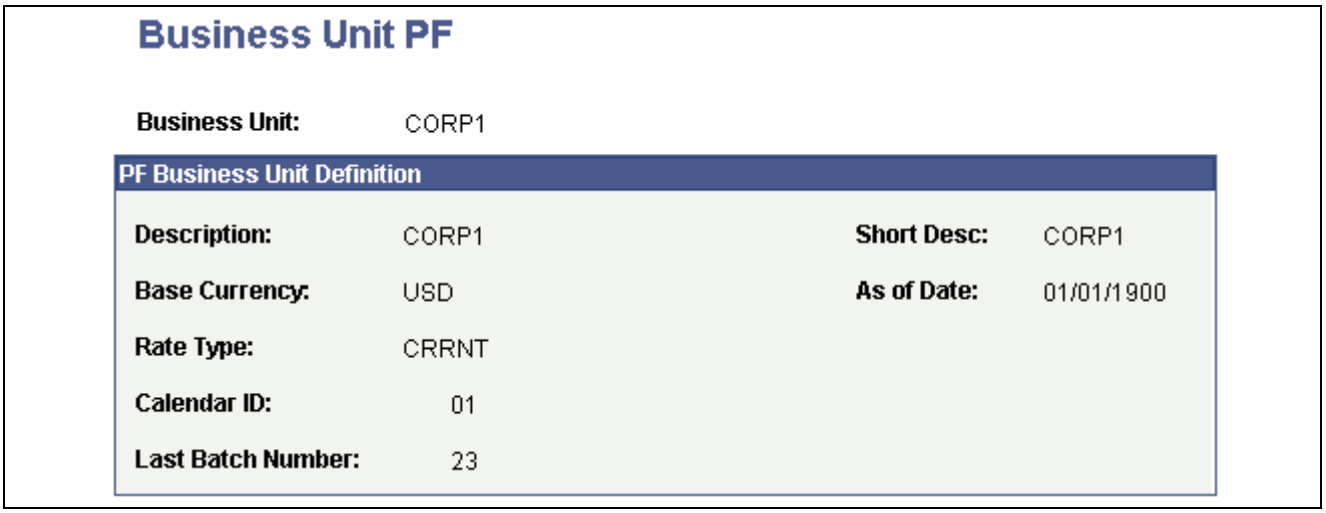
See Also

PeopleSoft Project Costing PeopleBook

Displaying Business Unit Codes

Access the Business Unit PF page.

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Business Unit PF page

Business Unit PF codes are applicable only if you are using Performance Management and you are not using People Soft Project Costing. 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 ePerformance PeopleBook

Creating Task Profiles

To create task profiles, use the Task Profile (TL_TASK_PROFILE) component. Use the TL_TASK_PROFILE component interface to load data into the tables for this component.

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.

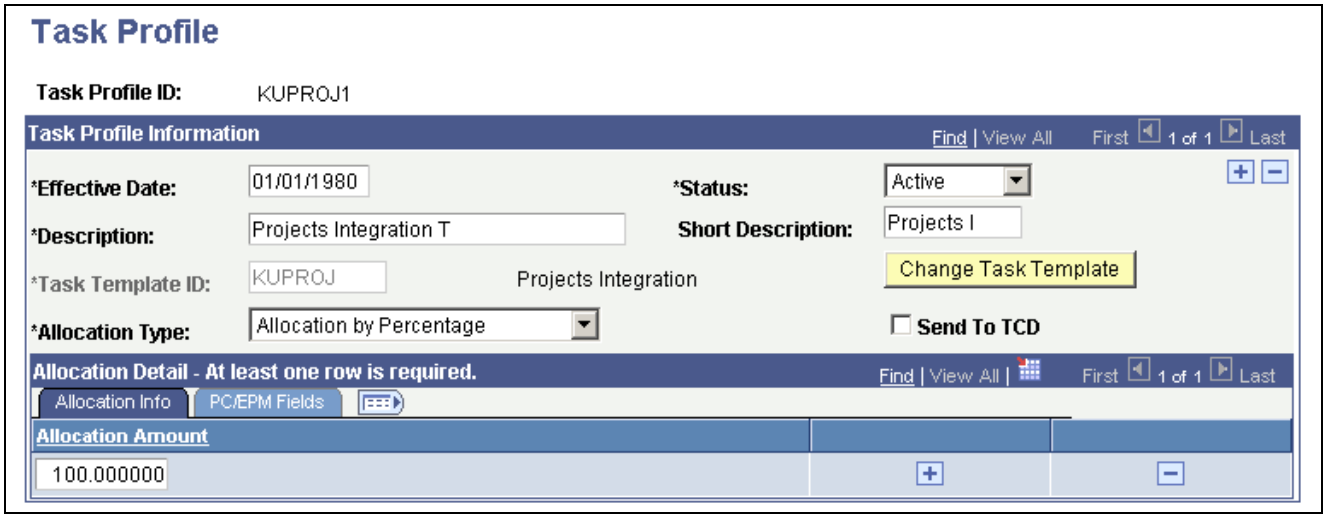
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Page Used to Create Task Profiles

Page Name	Object Name	Navigation	Usage
Task Profile	TL_TASK_PROFILE	Set Up HRMS, Product Related, Time and Labor, Task Configurations, Task Profile, Task Profile	Define task profiles. 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.

Creating Task Profiles

Access the Task Profile page.



Task Profile page

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.

Send to TCD Select this check box 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.)

Change Task Template Click this button only if you want 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.

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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.

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

Insert a row for each task (that is, the combination of task-related entities) to which you want to allocate time. For example, specify 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.

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.

Allocation Amount (allocation amount) The number you enter in this field depends on the option you selected in the Allocation Type field.

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.

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Tab Name	Fields
HR / TL Fields	Company, Business Unit, Location, HR Department, Jobcode, and Position Number, Customer, Task, TL Activity.
ChartFields	Combo code, and related ChartFields.
PC / EPM Fields	PC Business Unit, Project/Grant, Activity ID, Resource Type, Resource Category, Resource Subcategory, Business Unit PF, Activity FS depending on which Financials and Performance Management products are integrated with Time and Labor.
User Fields	User Field 1, User Field 2, User Field 3, User Field 4, User Field 5.

See Also

Chapter 16, “Using Time Collection Devices,” page 425

Chapter 7, “Defining Task Reporting Requirements,” Defining and Viewing Task Values in Time and Labor, page 145

Chapter 19, “Integrating with PeopleSoft Financials and Enterprise Performance Management,” Understanding Integration, page 527

Defining Taskgroups

To define taskgroups, use the Taskgroup (TASKGROUP) component. Use the TASKGROUP component interface to load data into the tables for this component.

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, 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.

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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

Chapter 7, "Defining Task Reporting Requirements," Defining and Viewing Task Values in Time and Labor, page 145

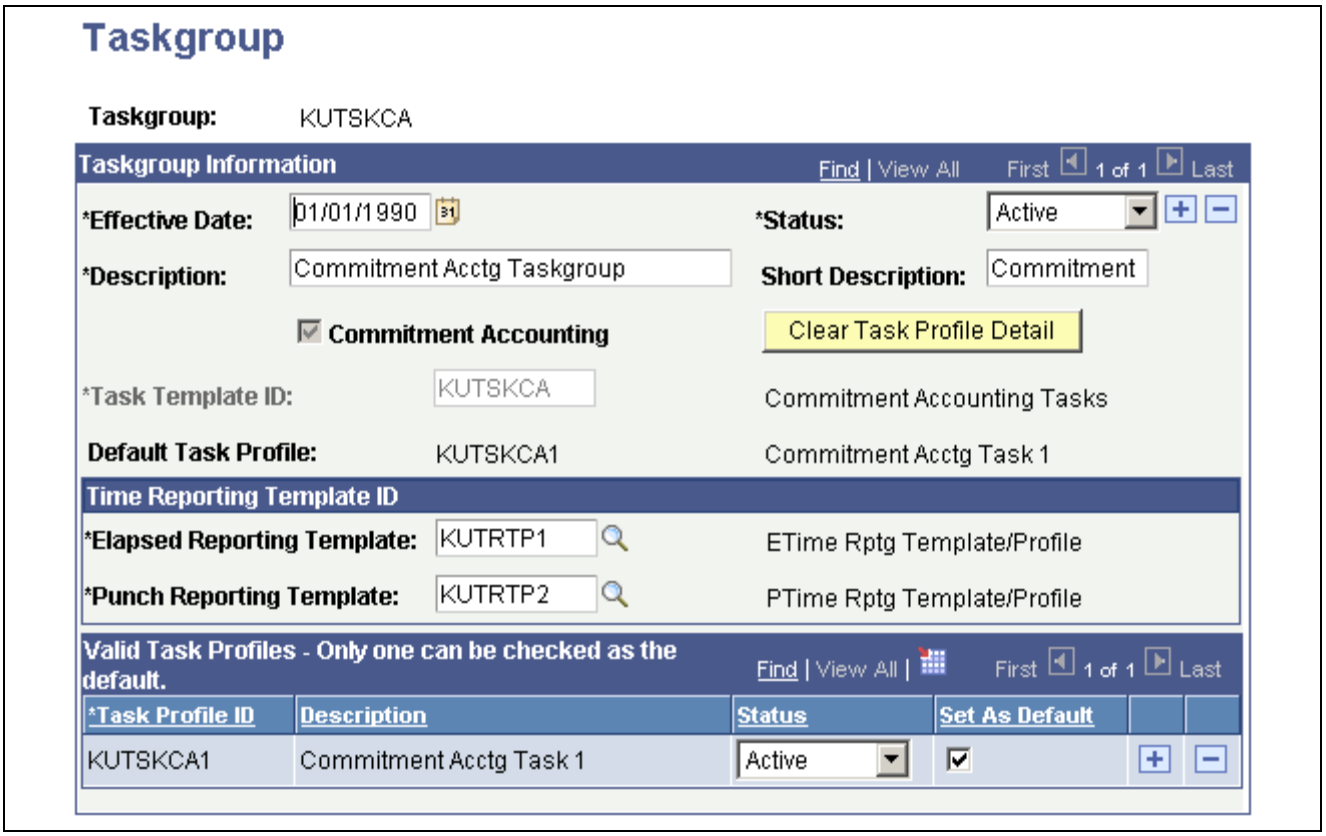
Appendix C, "Referential Integrity," page 735

Page Used to Define Taskgroups

Page Name	Object Name	Navigation	Usage
Taskgroup	TL_TASKGROUP_TBL	Set Up HRMS, Product Related, Time and Labor, Task Configuration, Taskgroup, Taskgroup	Define taskgroups.

Defining a Taskgroup

Access the Taskgroup page.



Taskgroup page

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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 want 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 has the Referential Integrity option on the Time and Labor Installation page 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 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 Reporting Template 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 Reporting Template 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

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this taskgroup, for example, elapsed time reporters who will never need to enter punch time.

Valid Task Profiles

Use the grid to attach one or more task profiles to the taskgroup. You will also select the default task profile for members of the taskgroup.

Task Profile ID Select the default task profile(s) you want to associate with this taskgroup. 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 check box if you want this task profile to be the default profile.

See Also

PeopleSoft Human Resources 9.0 PeopleBook: Manage Commitment Accounting

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CHAPTER 8

Defining Work Schedules

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

- Create work schedules and schedule definitions.
- Validate schedules.
- Share work schedules with Global Payroll.
- Import third-party schedules.

See Also

Chapter 22, "Using Manager Self-Service for Scheduling Components," Assigning Schedules, page 630

Chapter 10, "Setting Up Time Reporters," Assigning Schedules to a Group, page 217

Understanding Work Schedules

In 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 a schedule definition and assigning time reporters to it.

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 schedule information that Time Administration can use to create payable time for exception reporters
- To accept time reporters' schedules from external systems.
- To provide punch schedule information that can be sent to time collection devices.

Schedules

To create schedules:

1. Create shifts (optional).

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You can create elapsed, flex, and punch shifts. Shifts are either created on the Shift component or as part of the Schedule Definition.

2. Create workdays (optional).

   You can create workdays as labels for the type of day, to be associated in the schedule definition.

3. Create schedule definitions.

   Schedule definitions are the basic building blocks of work schedules and are used to create a series of short term or long term workdays.

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.

Note. Shifts can be created on the Shift page, or within schedule definitions.

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

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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 an optional component of the schedule definition that adds descriptive information. Additionally a workday may be used by Global Payroll Rules as a code to identify the type of day.

Schedule Definitions

Schedule definitions define a work schedule. Use schedule definitions to produce a single schedule of work expectations over a period of time including rotating work schedule.

For instance, the schedule definition could be composed of shifts representing a five-day, 08:00 to 17:00 workweek and shifts representing a five-day, 08:00 to 18:00 workweek. In addition, these shifts can be set up to repeat a specified number of times. We could specify that we will work four of the five-day, 08:00 to 17:00 workweek shifts 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 five–day, 08:00 to 17:00 workweek. Some of your time reporters might always work the five–day, 08:00 to 18:00 workweek, and some of your time reporters might work a combination of the two workweeks. This can all be set up as part of the schedule definition.

After creating a schedule definition, assign a time reporter, or group of time reporters, to it.

Schedule Calendars

While creating or completing a schedule definition, view the schedule calendar by selecting the Show Calendar link on the Schedule Definition — Shifts page. A schedule calendar is derived and calculated from the schedule definition and shift definitions (if used).

See Also

Chapter 22, “Using Manager Self-Service for Scheduling Components,” Assigning Schedules, page 630

Chapter 10, “Setting Up Time Reporters,” Assigning Schedules to a Group, page 217

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Creating Work Schedules and Schedule Definitions

To create work schedules and schedule definitions, use the Shifts (SCH_SHIFT), Workdays (SCH_WRKDAY) and Schedule Definition (SCH_DEFINITION) components. Use the SCH_SHIFT, SCH_WRKDAY and SCH_DEFINITION component interfaces to load data into the tables for these components.

This task comprises three steps (the first two are optional):

1. Setup shifts.
2. Setup workdays.
3. Create a schedule definition.

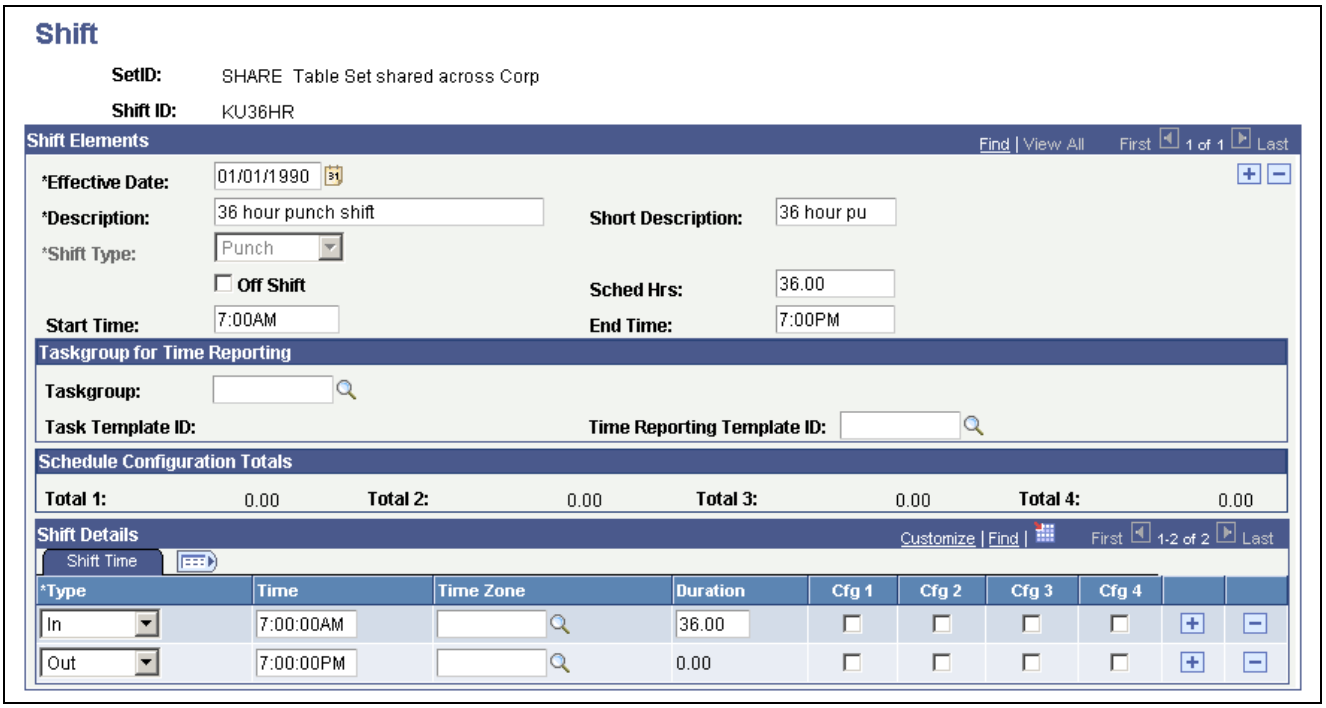
Pages Used to Create Work Schedules, and Schedule Definitions

Page Name	Object Name	Navigation	Usage
Shift	SCH_SHIFT	Set Up HRMS, Product Related, Time and Labor, Schedules, Shifts, Shifts	Set up elapsed, flex, and punch shifts.
Schedule Group	SCH_GROUP	Set Up HRMS, Product Related, Time and Labor, Schedules, Schedule Groups, Schedule Group	Set up schedule groups to categorize schedules.
Workday	SCH_WRKDAY	Set Up HRMS, Product Related, Time and Labor, Schedules, Workdays, Workday	Define shifts.
Schedule Definition	SCH_DEFINITION	Set Up HRMS, Product Related, Time and Labor, Schedules, Definitions, Definition	Set up schedule definitions.
Schedule Shifts	SCH_DEFINITION_2	Set Up HRMS, Product Related, Time and Labor, Schedules, Definitions, Schedule Shifts	Set up shift information, or enter shifts setup on the Shift page, for the schedule definition.
Schedule Calendar	SCH_CLND_VW_SEC	Click the Show Calendar link on the Schedule Shifts page.	View a schedule calendar.

Setting Up Shifts

Access the Shift page.

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Shift page

Shift ID

Shift ID is keyed by SetID. The SetID is used to filter shifts for display, for association to schedules.

Effective Date

Enter an effective date for this shift. If you modify previously-saved schedule definition detail, these limitations apply to the effective date on the Shift page:

- You cannot change the shift's effective date to a date earlier than the earliest effective date of all schedules containing that shift.
- You cannot change the shift's effective date to a date later than the earliest effective date of all workgroups or Global Payroll pay groups with default schedule IDs containing that shift.

Shift Type

If the value is *Elapsed,* only the elapsed punch types will display in the Shift Time – Shift Details grid. 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 unless the Off Shift check box is selected, in which case only In and Out 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.

Off Shift

Select to designate a shift as being non-work time. This field cannot be changed once the shift has been saved.

Sched Hrs (scheduled hours)

This field displays the total amount of work time for the shift. For example, you may require a time reporter to punch in at 09:00 and punch out at 17:00 each workday, but the shift includes a one-hour lunch break for which the time reporter isn't required to punch.

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The calculation of Total Scheduled Hours for the shift including meal and break is derived from the Schedule Total Options field on the Time and Labor Installation — Configurations page or the Schedule Settings on the System Settings page of Global Payroll/Absence Management setup.

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 schedules. If it is, then the schedule will need refreshing. Use the Schedules to be Validated page to learn if the changes will affect an existing schedule.

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

Start Time Enter the time the shift starts.

End Time Enter the time the shift finishes.

Taskgroup for Time Reporting

Taskgroup If required, select a taskgroup for the Taskgroup field. The Taskgroup and Time Reporting Template ID fields determine which reporting elements should be available for the Shift Detail rows on the Shift page. If these fields are blank, no elements will be visible. Otherwise, the default punch or elapsed time reporting template (depending on the definition type) from the taskgroup definition will be used to determine which time reporting elements will be visible.

If Task Profile Reporting is selected on the Time Reporting Template, the Task Profile ID element will be available, but no task elements. If Task Element Reporting is selected, the task reporting template from the taskgroup definition will be used to determine the task elements that display.

The task and time reporting elements will not be available for *OUT* punches, or for *Off Shifts*.

Time Reporting Template ID If a taskgroup is selected for the Default Taskgroup field, a Time Reporting Template may default. The Time Reporting Template may also be overridden manually.

Schedule Configuration Totals

Global Payroll, Absence Management and Time and Labor share schedule setup pages and records. However, these fields are only used by the Global Payroll and Absence Management systems. These totals are derived for the shift from the Schedule Configuration Indicators which can be associated to each punch or scheduled duration. There are four Schedule Configuration Indicators and four related Schedule Configuration Totals.

The labels for the Schedule Configuration Indicators and Schedule Configuration Totals fields are set using values from the Text Catalogue, and can be relabeled as needed.

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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.

Shift Details Grid

Type The terms *punch* and *punch type* are interchangeable. You cannot have consecutive type (except the value Transfer) of the same value. Valid 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.

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.

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	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.
Time Zone	Enter a time zone value if required. All punch times are converted to the Base time zone when stored on the database and converted when displayed/entered on the pages (this is done automatically by PeopleTools). When a punch time is entered, the duration of the previous punch is calculated. When a duration is entered, the time of the next punch is calculated. Those calculations are changed to take into account time zones. All times will be converted to the Base Timezone before calculating.
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 Schedule Configuration fields are for use with Global Payroll and Absence Management.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Using Schedules," Understanding Work Schedules

Setting Up Schedule Groups

Access the Schedule Group page.



Schedule Group page

A schedule group can be thought of as a schedule organization unit, similar to a business unit both in idea and design. Shifts, Workdays and Schedule Definitions are created based on a SetID value, and Schedule Groups group these together by way of the Set Control value.

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Schedule groups are specified on the Workgroup and Paygroup pages, and selected on the Schedule Assignment page. The label for Schedule Group is also set using values from the Text Catalog, and can be relabeled as needed.

Default SetID Select a SetID.

Clone Existing Schedule Group If an existing Schedule Group is entered, the SetID will be copied from its definition. The SetID must either already be defined on the SetID table, or be the same as the Schedule Group code. If it's the same as the Schedule Group, it will be inserted in the SetID table when the page is saved.

Note. The Default SetID field must be blank in order to enter or select a value for the Clone Existing Schedule Group field.

Defining Workdays

Access the Workday page.

Workday is keyed by SetID, for further filtering when building a schedule.



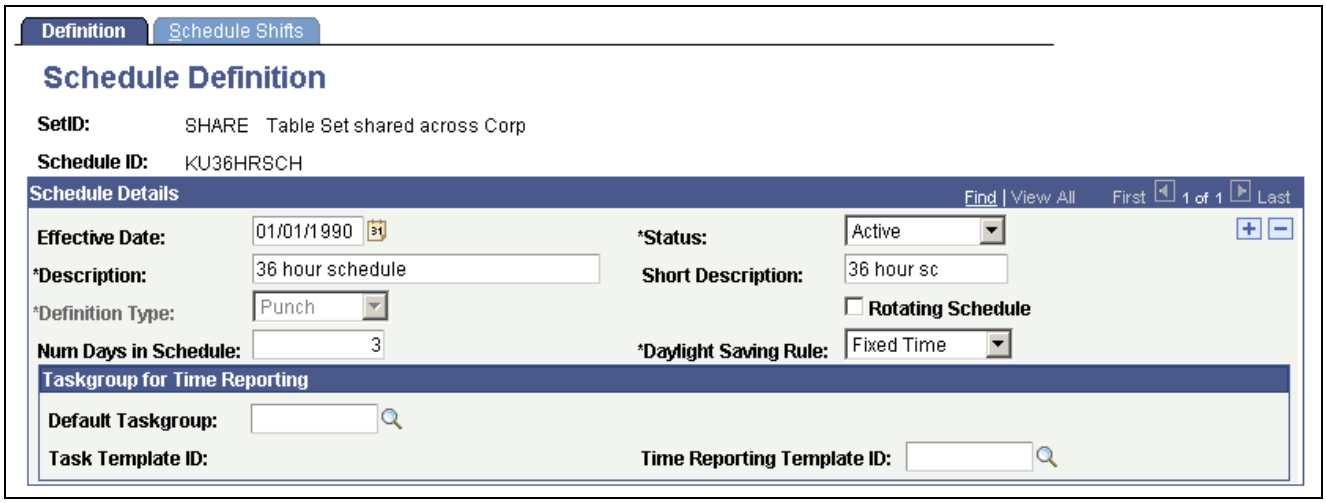
Workday page

Effective Date Enter an effective date for this workday.

Defining Schedules

Access the Schedule Definition page.

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Schedule Definition page

Schedule Definitions contain a list of shifts to be worked on each day of the schedule. Schedule Definitions are keyed by SetID for further filtering, and associated to a schedule group for filtering when assigning to an employee.

Effective Date

The effective date is used as the starting point of the Schedule Definition. Day one of the schedule starts from the effective date. When a new effective dated row is entered, the Day Numbers assigned to each row of the Schedule Definition — Shifts page, are recalculated. The system uses the previous active effective dated row of the Schedule Definition to calculate which Day number the Schedule would be up to on the new effective date. That Day will be made Day number 1. Days following this will be adjusted accordingly.

Definition Type

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

If the schedule definition is saved as a particular type, it cannot be changed to another type. Prior to saving for the first time, the field can be changed in add mode. If the field is changed, any shifts from the Shift Details grid on the Shifts page, that do not match the new type, are deleted.

If you do 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 on the Shift page. 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 on the Shift page. 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.

Num Days in Schedule (number of days in schedule)

Enter the number of days in this schedule. When the number of days is changed, the system automatically inserts or deletes the appropriate number rows from the Schedule Definition – Shifts page to ensure there is one row

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for each day of the schedule. There will always be at least one row for each day in the schedule.

Rotating Schedule Select this field if the schedule is to be used as a rotating schedule. The Rotation Details group box appears on the page. See Rotating Schedules later in this section.

Daylight Saving Rule This field caters for two issues that may arise from the use of Time Zones:

1. Where the shift starts and ends in different time zones, and those time zones have different daylight savings begin and end dates. The *Fixed Time* value is the default and is used to indicate that Fixed Time takes precedence. The Shift Duration will be recalculated in the Schedule Resolution process so that Duration = End Time – Start Time.
2. Where the shift start and end time crosses the date time where daylight savings begins or ends. If *Fixed Duration* is selected, punch times will be recalculated in the Schedule Resolution process so that End Time = Start Time + Duration.

Note. These calculations will be done only if different time zones are involved, or, the date is the beginning or end of daylight savings.

Default Taskgroup If required, select a taskgroup for the Default Taskgroup field. The Task and Time Reporting Templates determine which reporting elements should be available on the detail rows on the Shift page. If the Taskgroup and Time Reporting Template are blank, no elements will be visible. Otherwise, the default Punch or Elapsed Time Reporting Template (depending on the Definition Type) from the Taskgroup definition will be used to determine which Time Reporting elements will be visible.

If Task Profile Reporting is selected on the Time Reporting Template, the Task Profile ID element will be available, but no Task elements. If Task Element Reporting is selected, the Task Reporting Template from the Taskgroup definition will be used to determine the Task Elements that display.

The Task and Time Reporting elements will not be available for *OUT* punches, or for *Off Shifts*.

Time Reporting Template ID If a taskgroup is selected for the Default Taskgroup field, a Time Reporting Template may default. The Time Reporting Template may also be overridden manually.

Rotating Schedules

Select the Rotating Schedule field if the schedule is to be used as a rotating schedule. The Rotation Details grid appears on the page.

Each Rotation uses the same pattern of Shifts defined in the Schedule Definition, but has a different Relative Day number. The Relative Day number of the Rotation is used in the schedule resolution process when determining the Shifts to be worked on a specific date.

Each Rotation has an Offset Day number assigned. The Offset is used when the Schedule Calendar is derived, by adding it to the calculated Day Number. Therefore each Rotation follows the same pattern of Shifts, but will be at a different point in that pattern on any given day.

Multiple rotations of a schedule can be defined.

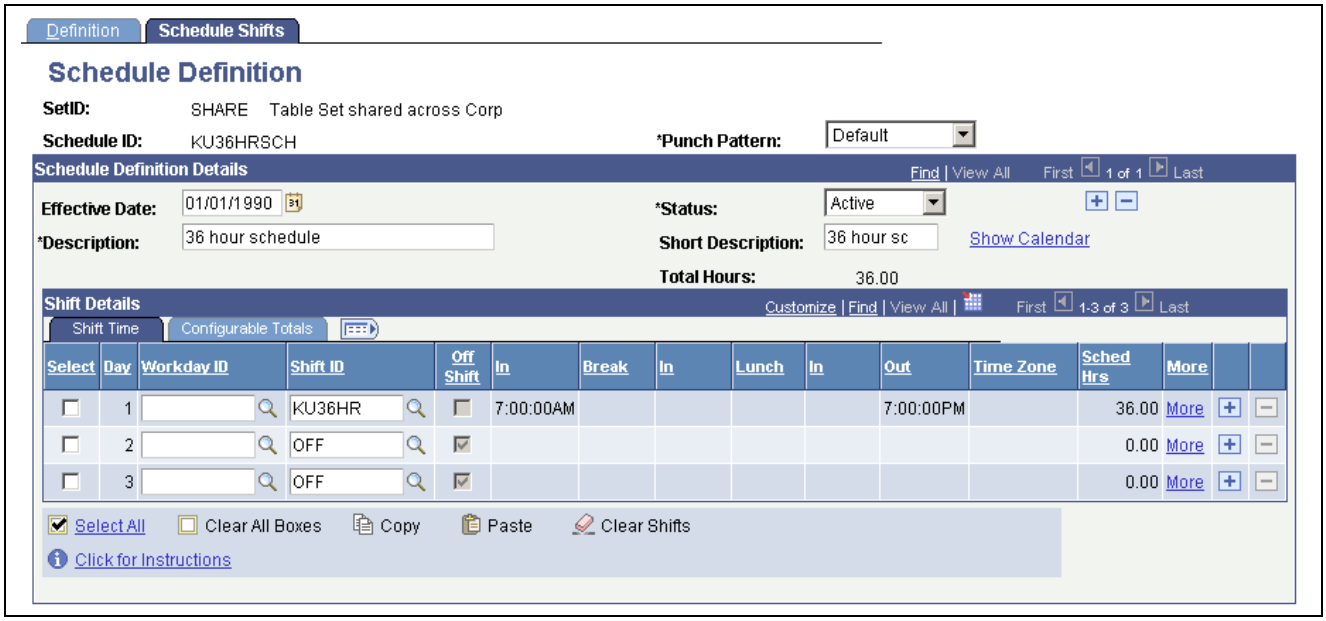
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Once saved, you cannot clear the Rotating Schedule field and Rotation ID's cannot be changed or deleted. However, an Effective Status at the rotation details level allows a rotation row to be inactivated.

When an employee is assigned to a rotating schedule, the Schedule ID and Rotation ID fields on the Schedule Assignment record identifies which Schedule ID and Rotation ID the employee is assigned.

Setting Up Schedule Definition — Shifts

Access the Schedule Definition – Schedule Shifts page.



Schedule Definition – Schedule Shifts page

Punch Pattern

On this page, if the Definition Type chosen on the Schedule Definition page is set to *Punch*, the Punch Pattern field will display with a value of *Default*, which is the punch pattern defined on the Time and Labor Installation — Configurations tab. If not all of the punch types are displayed that are needed, the user can change that from a value of *Default* to a value of *All Punches*, to see all punch types visible for use.

Note. There are two navigation paths for this tab: Setup HRMS, Install, Product and Country Specific, Time and Labor Installation, Configurations tab, and the Global Payroll/Absence Management navigation path: Setup HRMS, Product Related, Global Payroll and Absence Management, System Settings, Installation Settings, Schedule Settings Folder tab.

Effective Date

Enter an effective date for this shift. When a new effective dated row is entered, the day numbers assigned to each row of the Schedule Shifts page are recalculated. The system uses the previous active effective dated row of the schedule definition to calculate which day number the schedule would be up to on the new effective date. That day will be made day number 1. Days following this will be adjusted accordingly.

Total Hours

Sums the scheduled hours of the schedule.

Show Calendar

Click this link to view the derived Schedule Calendar page as you design your schedule definition.

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Note. You can also access the Schedule Calendar link from the Assign Work Schedule page.

Shift Details Grid

In the Shift Details grid, the Shift Time tab, Time Reporting Elements tab (if a time reporting template is chosen), Task Reporting Elements tab (if the time reporting template has task template selected instead of task profile), a Chartfields tab, if Chartfields are listed on the task template and finally a Configurable Totals tab.

The Configurable Totals tab will display the total of the Schedule Configuration Indicators that make up the scheduled day. There are four configuration totals, which can be used by Global Payroll or Absence Management users within their rules processing.

Shift ID The use can enter shifts to complete the schedule pattern. Shifts are optional, as start and end times for a punch schedule can be entered (if the Shift ID field is blank), or scheduled hours for an elapsed schedule for a day. If there are two shifts in one day, the user can use the + button at the end of each row, to add another shift for the day.

If Shift ID is blank, the Shift Details grid fields can be entered. All processing and validation of Shift Details entered here is the same as the standard Shift page. If Shift ID is entered, the details from the Shift definition are displayed, and the fields are display only.

For an Off Shift, the user can choose an off shift that has been created, or specify a specific start and end time for the off time and select the Off Shift check box.

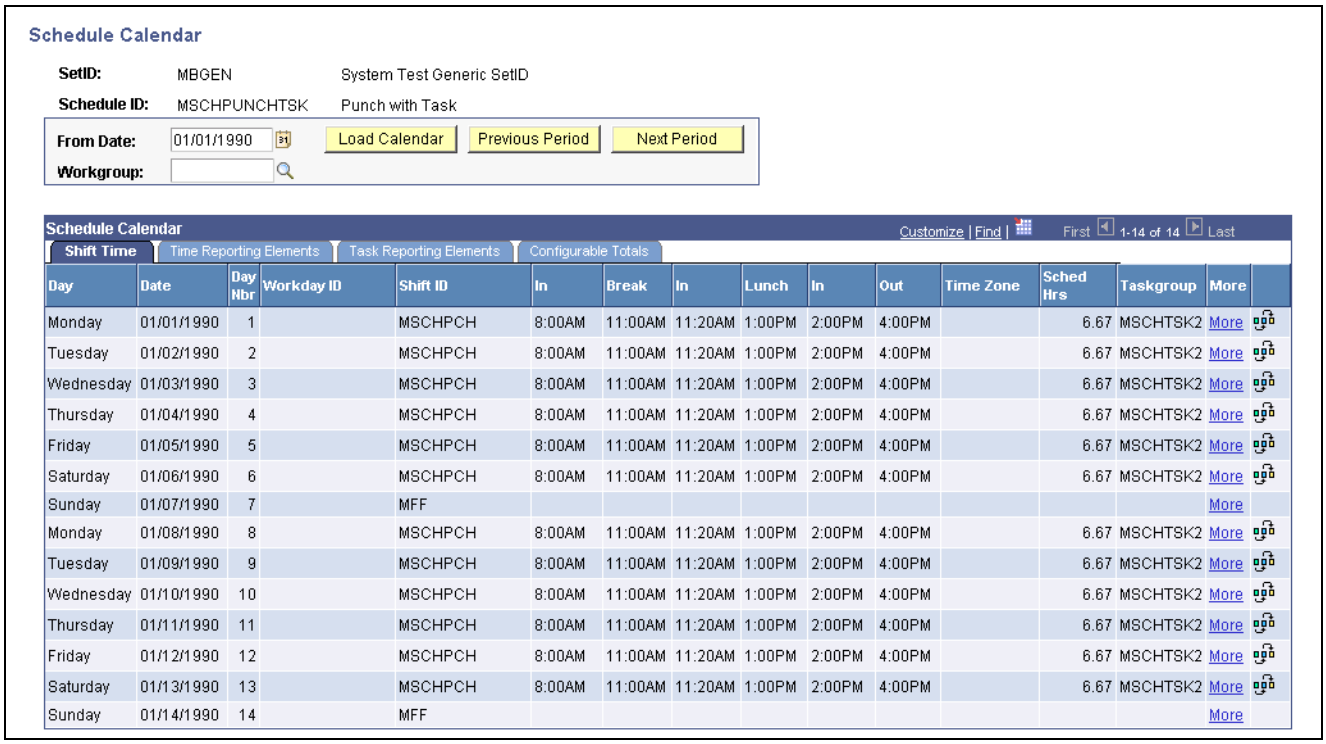
Workday The use can enter workdays to complete the schedule pattern. Workdays are optional, and used to label the actual day.

Click the More link beside a Shift Details row to be taken to the Shift definition page to update a shift if required. This view of the shift detail is important if there are changing elements within a shift, such as different timezones, task elements or time reporting elements.

Next to the More link, there is a column that displays a Changing Elements in a Shift icon. This icon represents a shift that has a different task or time reporting elements scheduled for different punch times. For more detail of the changing elements, you can click on the More link for Shift detail.

The column for Changing Elements per Shift also appears on the Schedule Calendar page, which can be accessed from the Show Calendar link on the Schedule Shift Detail page.

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Schedule Calendar

SetID: MBGEN System Test Generic SetID

Schedule ID: MSCHPUNCHTSK Punch with Task

From Date: 01/01/1990 Load Calendar Previous Period Next Period

Workgroup:

Schedule Calendar — Customize | Find | First 1-14 of 14 Last

Shift Time | Time Reporting Elements | Task Reporting Elements | Configurable Totals

Day	Date	Day Nbr	Workday ID	Shift ID	In	Break	In	Lunch	In	Out	Time Zone	Sched Hrs	Taskgroup	More
Monday	01/01/1990	1		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Tuesday	01/02/1990	2		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Wednesday	01/03/1990	3		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Thursday	01/04/1990	4		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Friday	01/05/1990	5		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Saturday	01/06/1990	6		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Sunday	01/07/1990	7		MFF										More
Monday	01/08/1990	8		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Tuesday	01/09/1990	9		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Wednesday	01/10/1990	10		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Thursday	01/11/1990	11		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Friday	01/12/1990	12		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Saturday	01/13/1990	13		MSCHPCH	8:00AM	11:00AM	11:20AM	1:00PM	2:00PM	4:00PM		6.67	MSCHTSK2	More
Sunday	01/14/1990	14		MFF										More

Schedule Calendar page

To reuse days in the schedule, select the days to copy (by selecting the Select check box next to the appropriate rows), then click the Copy link. Next, select the day to restart the pattern, and click the Paste link. The Select All link will select all of the rows. The Clear Shifts link will clear all of the shift details entered on the selected rows. The Clear All Boxes link will clear all selected boxes. The Click for Instructions link is a collapsible section of instructional text on how to use the links.

There is a Scheduled Hours total for each day and also a Total Hours for the whole schedule at the top of the page.

When the schedule definition is saved, the system checks that any punch or flex shifts in the schedule do not overlap with a shift on the same, or a following day. The last shift of the schedule will also be checked for an overlap with the first shift.

Note. When setting up longer shifts, such as a 48 hour shift, you need a break between the shift and then an *Off* day, since the 48 hour shift spans over two days. It is up to the user how many off days there are in between.

See Also

Chapter 22, “Using Manager Self-Service for Scheduling Components,” page 627

Validating Schedules

To validate schedules, use the Schedules to be Validated (SCH_CLND_REFRESH) component.

For punch type schedules, when a change is made to a shift, the related schedule(s) may need to be re-validated.

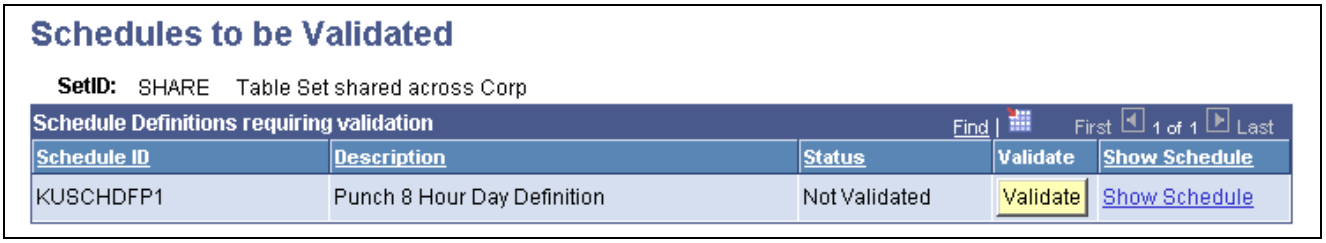
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Pages Used to Validate Schedules

Page Name	Object Name	Navigation	Usage
Schedules to be Validated	SCH_CLND_REFRESH	Set Up HRMS, Product Related, Time and Labor, Schedules, Schedules to be Validated, Schedules to be Validated	Schedules may need to be re-validated when a change is made to a shift.

Validating Schedules

Access the Schedules to be Validated page.



Schedules to be Validated page

This page contains a list of schedules that need validating because a related shift was modified for punch type schedules. The system displays a schedule ID, description and status for each schedule that needs validating.

Click the Validate button to validate the schedule or click the Show Schedule link to access the Schedule Definition page.

Note. If an employee does not have a row in the Assign Work Schedule page, and is enrolled in a Global Payroll pay group on the Job Data page, the system uses the default schedule ID from the pay group to resolve the schedule. If the employee is not enrolled in a Global Payroll pay group on the Job Data page, but is enrolled in Time and Labor, the system uses the schedule ID from the employee's workgroup as the default schedule when resolving the schedule.

Note. When Time Administration creates payable time for an exception time reporter, who has a punch schedule, it applies daybreaker logic from the employee's workgroup when creating this time. When Time Administration creates forecasted payable time for an employee with a punch schedule, it also applies daybreaker logic from the employee's workgroup for this time. Time Administration's use of the daybreaker, daybreaker options and daybreaker ranges are applied to the schedule in the same way as employees who had reported punch time resolved into payable time or forecasted payable time.

Sharing Work Schedules with Global Payroll

Time and Labor and 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:

- The payees you can access through the Assign Work Schedule page or Manage Schedules page may vary depending on whether the page is opened through Global Payroll or Time and Labor.

  The security options set up for each system determine which population of payees a user can work with.

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- The schedule that appears when accessing the Assign Work Schedule page or Manage Schedule page in Time and Labor may differ from the schedule that appears when accessing the same pages in Global Payroll.

  If an employee is in a Global Payroll pay group, the default schedule is based on the GP pay group, regardless of whether Time and Labor is used. If not a Global payroll employee and Time and Labor is installed, it will be derived from the Time and Labor workgroup assigned to the employee.

See Also

Chapter 22, "Using Manager Self-Service for Scheduling Components," Assigning Schedules, page 630

Chapter 8, "Defining Work Schedules," Creating Work Schedules and Schedule Definitions, page 164

Chapter 22, "Using Manager Self-Service for Scheduling Components," Understanding Manager Self-Service for Scheduling Components, page 627

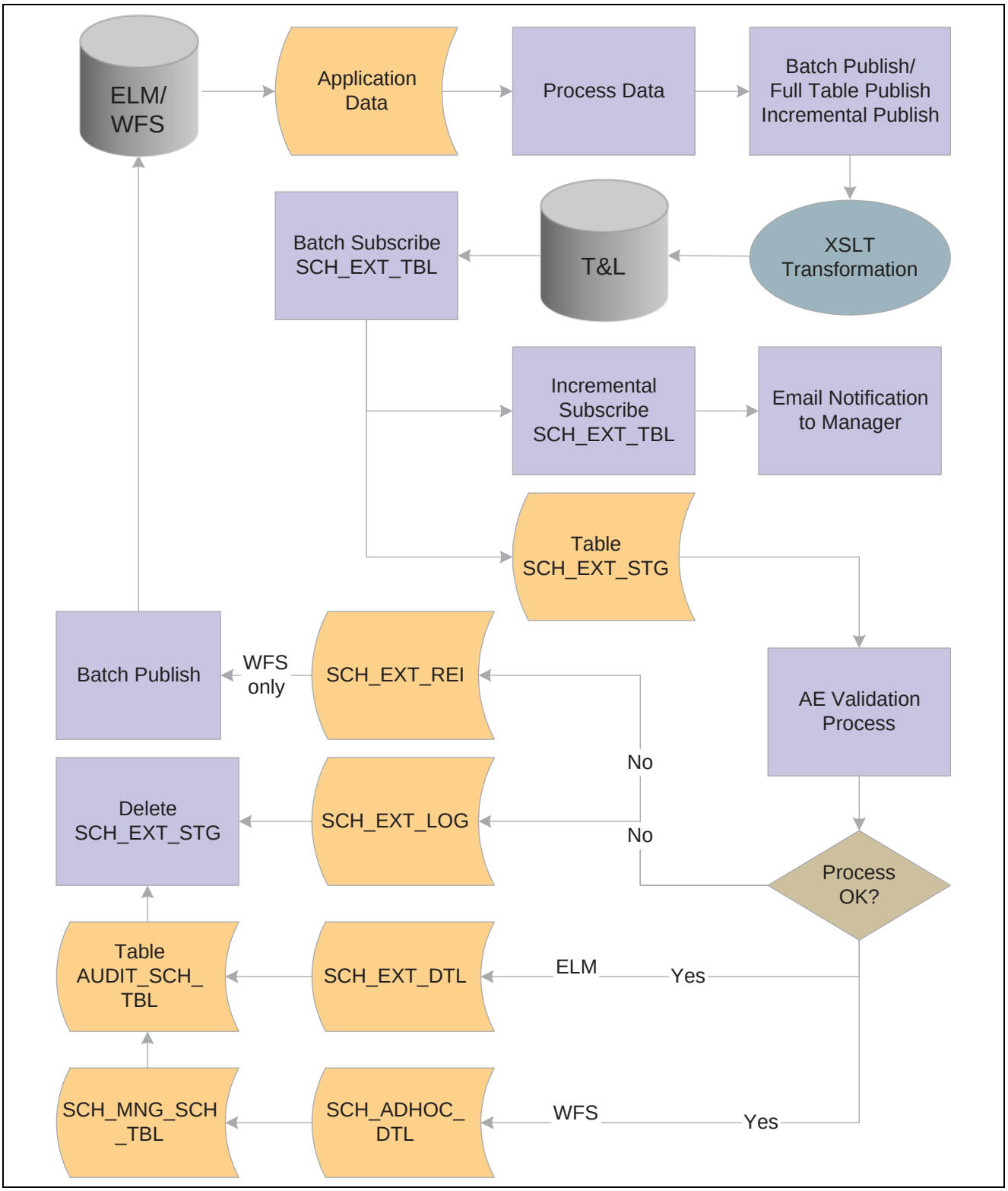
Importing Third-Party Schedules

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 data should be mapped to the SCH_EXT_TBL, which is the record behind the Scheduled Time Sync and Fullsync messages. The SCH_ADHOC_DTL and SCH_MNG_SCH_TBL records serve as the final repository for this schedule override information. Process these schedules in Time Administration by setting up rules that run against this scheduled information. Reported time can be created from this scheduled time, and payable time or forecasted payable time can also be created from this scheduled time.

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.

This diagram shows how Time and Labor accepts external scheduling information:

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Schedule Integration flow

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Time and Labor will create a common staging record structure (SCH_EXT_STG) so that it can subscribe information from various sources (LM, and Workforce Scheduling). The data subscribed is stored in the staging table. A validation application engine process (SCH_EXTVALID) is invoked to process all the data in the staging table before loading the final data into the application tables. After the validation process, the staging table will be deleted.

The staging and the application tables have exactly the same fields and key fields. Additional fields such as PROCESS_INSTANCE, AUDIT_ACTION are also included in the staging table for AE processing. Depending on the source, validated data will be inserted into the appropriate tables. For Workforce Scheduling information, the data will be inserted into SCH_ADHOC_DTL table, which carries the detailed scheduling information. It will also be inserted into the SCH_MNG_SCH_TBL for summarization purposes. .

If the SCH_EXTVALID validation process runs and finds rows of scheduled time from a workforce scheduling system that either do not pass validations, or are missing key values or are duplicate rows, the SCHEDULED_TIME_ERROR batch message gets triggered. This message publishes these rows back to the scheduling system with a REJECTED_REASON code defined in the SCH_EXT_REJ table. The SCHEDULED_TIME_ERROR message is based on the SCH_EXT_REJ record structure. The data which does not pass validations will first be staged in the SCH_EXT_REJ_STG table. Once the message has been published, the system clears the staging table, and the rejected rows will ultimately be stored in the SCH_EXT_LOG table. The fields validated are EmplID, Empl Rcd and SCHED_SOURCE. In order to use the SCHEDULED_TIME_ERROR message, its batch publish rule must be activated

Any other information such as Training, and so on, will be inserted into SCH_EXT_DTL table. Additionally, the AUDIT_SCH_TBL is an audit trail to track all transactions that are added, changed or deleted successfully into SCH_ADHOC_DTL table. A new field has been introduced SCH_CATEGORY to identify the category of the schedule. The category can be training information, absence, work, or other. The same category can come from different sources. For instance, absence is a category that can come from Workforce Scheduling or Absence systems. In the current application, ELM does not send to Time and Labor this schedule category field due to the new field has just been introduced. Therefore, Time and Labor will derive the data coming from ELM being categorized under “training data.”

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Note. Scheduled Time Fullsync messaging is used to transmit data from third-party scheduling systems to Time and Labor. The Scheduled Time Sync message for integration with third-party scheduling systems is not used.

Both the Scheduled Time Fullsync and Scheduled Time Sync messages are used for integration with Enterprise Learning Management.

The Scheduled Time Fullsync message never deletes what exists in the SCH_EXT_TBL or the corresponding application tables. For that reason, the Fullsync message should be run once for integration with ELM, to bring over the training information, such as activity and session information. For use with a third–party scheduling system, the Scheduled Time Fullsync should send over new scheduling information. However, if the user would like to change the schedule for a day that has already been published from a third–party scheduling system, they would need to send that same data over with the DELETE_IND equal to *Y* for that data and then send over the data they want added for that day with the DELETE_IND equal to *N*.

Also, for sending punch time schedule information, if the third–party scheduling system is transmitting data with START_TIME and END_TIME on one row of data, when it gets converted to two rows in the application table, with an *In* and an *Out* punch for the rows, with the appropriate times updated in the PUNCH_DTTM field.

Scheduled Time Sync messaging can also trigger a notification to the manager that an external schedule event has changed, if you setup the notifications for External Schedule Event on the Time and Labor Installation page. For example, an employee has enrolled in training, or the training session was cancelled, or the employee dropped the training. Both the Scheduled Time Fullsync and the Scheduled Time Sync messages insert into the AUDIT_SCH_TBL to track schedule audit changes for external scheduling events.

The main record that is used to map data to is SCH_EXT_TBL. This is the record used for Scheduled Time Fullsync and Scheduled Time Sync messages.

The ELM flag on the General Installation page, needs to be checked, in order for the user to view ELM training data icons in Manage Schedules, Monthly Schedules and Calendars.

Note. Scheduling does not administer workforce scheduling, as it does not run rules to balance resources and constraints.

The following table describes the fields for SCH_EXT_TBL for the Scheduled Time Fullsync and Scheduled Time Sync messages:

Note. The fields marked as "not validated" are not part of the validation application engine, the system accepts the values as they are sent.

Field Name	Type	Validation Process	Description
EMPLID	Char 11	EmplID must exist in HR database. Also, the person must have an active row in Job record.	Employee ID
EMPL_RCD	Nbr 3	EmplID must have valid employee record.	Employee Record Number

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Field Name	Type	Validation Process	Description
SCHED_SOURCE	Char 2	Source must be from a valid source defined.	Source AB – Absence LM – Learning Management GP – Global Payroll OT – Other TR – HR Training Administration WF – Workforce Scheduling
SEQ_NO	Nbr 2	Number to define each shift per day. For multiple shifts, must use the next number in sequence to specify a different shift. If there is one row per scheduled punch, then each row will have the same number for each shift. Example: All rows for Shift 1 will have "1", all rows for Shift 2 will have "2".	Sequence Number for multiple shifts (WFS only)
SEQNUM	Nbr 3	Each number should be unique for each shift. If there is one row per scheduled punch, each row SEQNUM must be unique and in order. If more than one shift per day, the numbering must start over again.	Sequence Number
SCH_CATEGORY	Char 2	Field must have value when getting inserted into the application table.	Schedule Category AB: Absence MT: Meeting OT: Other TR: Training WK: Work
PUNCH_TYPE	Char 2	Punch type must be from a valid punch type defined depending on the source. Not applicable for LM.	Type of Punch 0 – Elapsed 1 – In 2 – Out 3 – Meal 4 – Break 5 - Transfer

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Field Name	Type	Validation Process	Description
DUR	Date 10	No validation on this field.	Workday Start Date For WFS - For Punch Shifts, DUR is the Date part of PUNCH_DTTM for the first IN Punch of a Punch Shift. For Elapsed Shifts, DUR should be coming in on the WFS message. PUNCH_DTTM would not be used. For LM – DUR is equal to Session Date
SCH_PRIM_ALT_IND	Char 1	No validation on this field.	Default to “P” (Primary), Values are “P” for Primary and “A” for Alternate.
PUNCH_DTTM	DtTm 26	No validation on this field.	Date From WFS - PUNCH_DTTM for the first IN Punch of a Punch Shift.
SCHEDULE_GRP	Char	No validation on this field.	Schedule Group
SETID	Char 5	No validation on this field.	Set ID
WRKDAY_ID	Char 10	No validation on this field.	Workday ID
OFFDAY_IND	Char 1	No validation on this field.	Off Day Indicator Y: Yes N: No
SHIFT_ID	Char 10	No validation on this field.	Shift ID
DELETE_IND	Char 1	No validation on this field.	Delete Schedule Detail Y: Yes N: No
TL_TR_SBR	SubRecord		
TRC	Char 5	No validation on this field.	Time Reporting Code
TL_QUANTITY	Sign 12.6	No validation on this field.	Quantity
CURRENCY_CD	Char 3	No validation on this field.	Currency Code
COUNTRY	Char 3	No validation on this field.	Country
STATE	Char 6	No validation on this field.	State
LOCALITY	Char 10	No validation on this field.	Locality

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Field Name	Type	Validation Process	Description
COMP_RATECD	Char 6	No validation on this field.	Comp Rate Code
BILLABLE_IND	Char 1	No validation on this field.	Billable Indicator
OVERRIDE_RATE	Sign 12.6	No validation on this field.	Override Rate
TL_TASK_SBR	SubRecord		
COMPANY	Char 3	No validation on this field.	Company
BUSINESS_UNIT	Char 5	No validation on this field.	Business Unit
SETID_LOCATION	Char 5	No validation on this field.	Location SetID
LOCATION	Char 10	No validation on this field.	Location Code
SETID_DEPT	Char 5	No validation on this field.	Department SetID
DEPTID	Char 10	No validation on this field.	Department
SETID_JOBCODE	Char 5	No validation on this field.	Jobcode SetID
JOBCODE	Char 6	No validation on this field.	Jobcode
POSITION_NBR	Char 8	No validation on this field.	Position Number
PRODUCT	Char 6	No validation on this field.	Product
CUSTOMER	Char 10	No validation on this field.	Customer
ACCT_CD	Char 25	No validation on this field.	Account Code
BUSINESS_UNIT_PC	Char 5	No validation on this field.	PC Business Unit
BUSINESS_UNIT_PF	Char 5	No validation on this field.	Perf Business Unit
PROJECT_ID	Char 15	No validation on this field.	Project/Grant
SETID_ACTIVITY	Char 5	No validation on this field.	Activity SetID
ACTIVITY_ID	Char 15	No validation on this field.	Activity ID
RESOURCE_TYPE	Char 5	No validation on this field.	Resource Type
SETID_RESOURCE	Char 5	No validation on this field.	Resource SetID
RESOURCE_CATEGORY	Char 5	No validation on this field.	Resource Category
RESOURCE_SUB_CAT	Char 5	No validation on this field.	Resource Sub category
TASK	Char 5	No validation on this field.	Task
USER_FIELD_1	Char 10	No validation on this field.	User Field 1

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Field Name	Type	Validation Process	Description
USER_FIELD_2	Char 10	No validation on this field.	User Field 2
USER_FIELD_3	Char 15	No validation on this field.	User Field 3
USER_FIELD_4	Char 20	No validation on this field.	User Field 4
USER_FIELD_5	Char 20	No validation on this field.	User Field 5
RULE_ELEMENT_1	Char 10	No validation on this field.	Rule Element 1
RULE_ELEMENT_2	Char 10	No validation on this field.	Rule Element 2
RULE_ELEMENT_3	Char 10	No validation on this field.	Rule Element 3
RULE_ELEMENT_4	Char 10	No validation on this field.	Rule Element 4
RULE_ELEMENT_5	Char 10	No validation on this field.	Rule Element 5
SCH_CONFIG_IND1	Char 1	No validation on this field.	Schedule Config Indicator 1
SCH_CONFIG_IND2	Char 1	No validation on this field.	Schedule Config Indicator 2
SCH_CONFIG_IND3	Char 1	No validation on this field.	Schedule Config Indicator 3
SCH_CONFIG_IND4	Char 1	No validation on this field.	Schedule Config Indicator 4
SCH_EXT_FLD1	Char 10	No validation is done as different sources can send different values.	Key Field 1 used from Source. ELM - Session ID
SCH_EXT_FLD2	Char 10	No validation is done as different sources can send different values.	Additional key Field 2 from Sources
SCH_EXT_FLD3	Char 10	No validation is done as different sources can send different values.	Additional key Field 3 from Sources
SCH_EXT_ACT_STATUS	Char 1	No validation is done. LM sends this value.	Schedule Activity Status
SCH_EXT_ACT_TYPE	Char 3	No validation is done. LM sends this value.	Schedule Activity Type
ACTIVITY_NAME	Char 200	No validation is done. LM sends this value.	Description of activity
SCH_EXT_EVENT_TYPE	Char 4	No validation is done. LM sends this value.	Schedule Event Type

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Field Name	Type	Validation Process	Description
START_DATE	Date 10	Start Date of the Schedule.	LM: Start Date of Session WFS: Determine the day of the shift
END_DATE	Date 10	End Date of the Schedule	LM: End Date of Session WFS: End Date of the Schedule
START_TIME	Time 15	No validation done.	LM: Start Time of Session WFS: Convert to IN Punch
END_TIME	Time 15	No validation done.	LM: End Time of Session WFS: Convert to OUT Punch Time
TIMEZONE	Char 9	No validation done. Time Zone to be populated for scheduled times. Use this field to convert the time to the base time zone.	Time Zone
FACILTY_DESCR	Char 50	No validation done.	Facility Description
ADDRESS1	Char 55	No validation is done. LM sends this value.	Address1
ADDRESS2	Char 55	No validation is done. LM sends this value.	Address2
ADDRESS3	Char 55	No validation is done. LM sends this value.	Address3
ADDRESS4	Char 55	No validation is done. LM sends this value.	Address4
CITY	Char 30	No validation is done. LM sends this value.	City
NUM1	Char 6	No validation is done. LM sends this value.	Number 1

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Field Name	Type	Validation Process	Description
NUM2	Char 4	No validation is done. LM sends this value.	Number 2
HOUSE_TYPE	Char 2	No validation is done. LM sends this value.	Type of House AB: House Boat Reference WW: House Trailer Reference
ADDR_FIELD1	Char 2	No validation is done. LM sends this value.	Address Field 1
ADDR_FIELD2	Char 4	No validation is done. LM sends this value.	Address Field 2
ADDR_FIELD3	Char 4	No validation is done. LM sends this value.	Address Field 3
COUNTY	Char 30	No validation is done. LM sends this value.	County
POSTAL	Char 12	No validation is done. LM sends this value.	Postal Code
GEO_CODE	Char 11	No validation is done. LM sends this value.	Geographical Code
IN_CITY_LIMIT	Char 1	No validation is done. LM sends this value.	In City Limit
ORIGINATORID	Char 30	No validation done.	Original operator ID who creates the record
DATETIME_CREATED	DtTm 26	No validation is done. LM sends this value.	Date and Time first created
OPRID_LAST_UPDT	Char 30	No validation is done. LM sends this value.	Last person who updates the record
DATETIME_UPDATED	DtTm 26	No validation is done. LM sends this value.	Date and Time last updated

Managing Third-Party Schedules

This section presents tips for addressing:

- Rejected schedule records.
- Field requirements for transmitting schedule data.

Rejecting Schedule Records

SCH_EXT_LOG is the table containing rows of all rejected scheduled time that did not make it into the PeopleSoft Application tables SCH_EXT_REJ_STG is the staging table for rejected rows that would get sent back to a third party scheduling system.

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For both the SCH_EXT_LOG and SCH_EXT_REJ_STG tables, there is a SCH_REJECT_REASON field which explains why the scheduled time is rejected.

SCH_REJECT_REASON codes :

Code	Description
01	Invalid Employee and Employee Record Number
02	Invalid Schedule Source
03	Invalid Schedule Category
04	Invalid Punch Type
05	Invalid Activity
06	Invalid Activity Type
07	Invalid Event
08	Invalid Time Zone
09	Transaction already exists
10	Cannot add, transaction exists
11	Cannot change or delete, transaction exists

Field Requirements for Transmitting Schedule Data

These are tips for working with some field requirements for transmitting schedule data:

- Multiple Shifts

  To send multiple shifts per day, ensure the fields SEQ_NO and SEQNUM are correctly populated.

- SEQ_NO

  Should be populated with the same number for the same shift for the day.

- SEQNUM

  Should be populated with an incremented number for each row for the same shift for the day, and then start over again if another shift exists on the same day.

- Multiple Punch Rows for Punch Shift

  For a punch schedule, if sending PUNCH_TYPE and PUNCH_DTTM fields, do not need to populate START_DATE, END_DATE, START_TIME and END_TIME

- One row for Punch Shift

  To send a summarize row for punch schedule for the day, the fields START_DATE, END_DATE, START_TIME and END_TIME need to be populated, and the system will then split the time into an IN and OUT punch into SCH_ADHOC_DTL table.

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Total punch scheduled hours will be summarized based on the Schedule Total option (INCL_ML_BRK_FLG) on the Configuration tab of the TL Installation component or the Schedule Settings page on the System Settings of Global Payroll and Absence Management. The inclusion of meal and break punches to determine total scheduled hours are the options for this configuration.

- DUR

  DUR should always be populated with the date, whether sending Elapsed or Punch Schedule

- TL_QUANTITY

  Should be populated if sending Elapsed Scheduled Hours.

The following table illustrates field format examples

Field	Format	Example
START_TIME	HH:MM:SS.ssssss	07:00:00.000000
END_TIME	HH:MM:SS.ssssss	13:30:00.000000
START_DATE	YYYY-MM-DD	2004-06-11
END_DATE	YYYY-MM-DD	2004-06-11

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CHAPTER 9

Establishing Static and Dynamic Groups

This chapter provides overviews 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 Time and Labor use groups of time reporters that 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.

Dynamic groups are resolved at run time for batch processes, but the group detail tables are not permanently updated. Refreshing dynamic groups within the group or using the Refresh Dynamic Group batch process will update the group detail tables.

Time Administration and other batch processes call and refresh the group population as of start date that you specify on the run control page. If you do not enter a start date, they system uses current data for processing, but does not refresh the group details for other processes.

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 so that many online processes can use these groups.

Understanding Group Security

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

- Group Creation Security.

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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 HRMS data permission security for a particular permission list, everyone who uses 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. 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

These online functions use groups:

- Mass time reporting.
- Group schedule assignment.
- Approve payable time (this uses the Manager Search filter feature which includes Group ID).
- Manage exceptions (this uses the Manager Search filter feature which includes Group ID).
- View TR Status page (uses Group ID).
- Manager Search filter used on Manager Self-Service pages.

These batch processes use groups:

- 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

Chapter 11, “Establishing Time and Labor Security,” page 221

Chapter 10, “Setting Up Time Reporters,” page 203

Setting Group Creation Security

To set up group creation security, use the Group Creation Security (TL_GROUP_FIELD_SEC) component.

This section provides an overview of group creation security and discusses how to set group creation security.

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Understanding 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 these six records:

- JOB
- EMPLOYMENT
- PERSONAL_DT_FST
- 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)

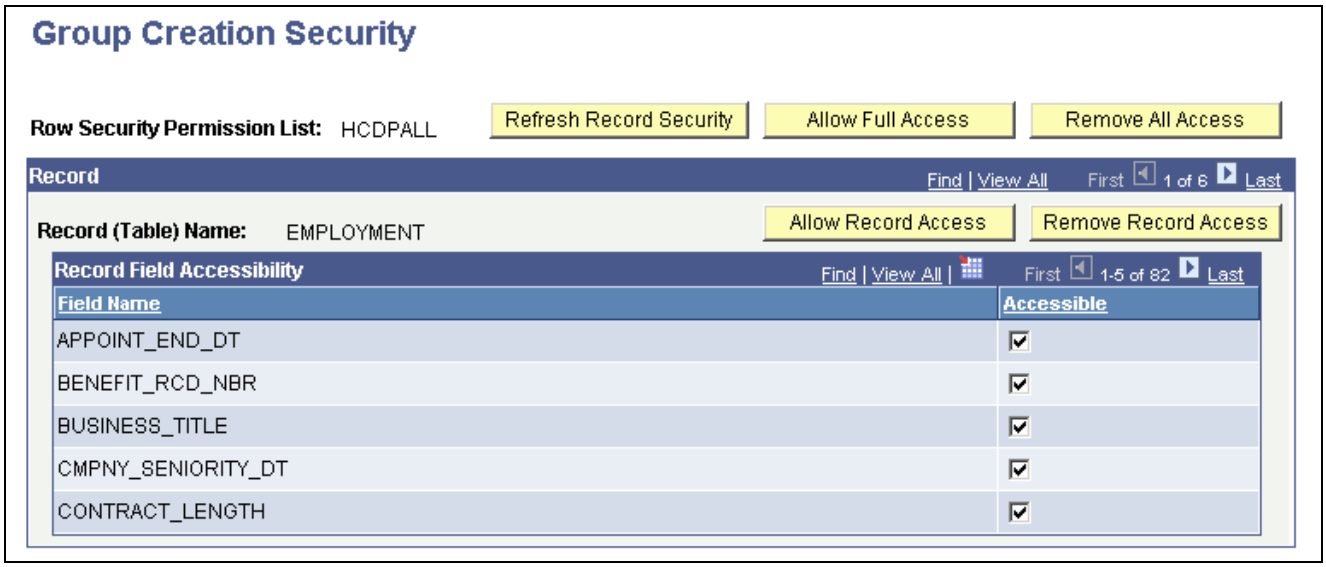
Page Used to Set Group Creation Security

Page Name	Object Name	Navigation	Usage
Group Creation Security	TL_GRP_FLD_SEC	Set Up HRMS, Security, Time and Labor Security, Group Creation Security, Group Creation Security	Prevent row-security classes from creating groups that are based on sensitive data.

Setting Group Creation Security

Access the Group Creation Security page.

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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 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.

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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

To create or update static groups, use the Static Group (TL_STATIC_GRP) component.

This section discusses how to:

- Specify criteria for static group members.
- View and update static group members.
- Set up static group security.

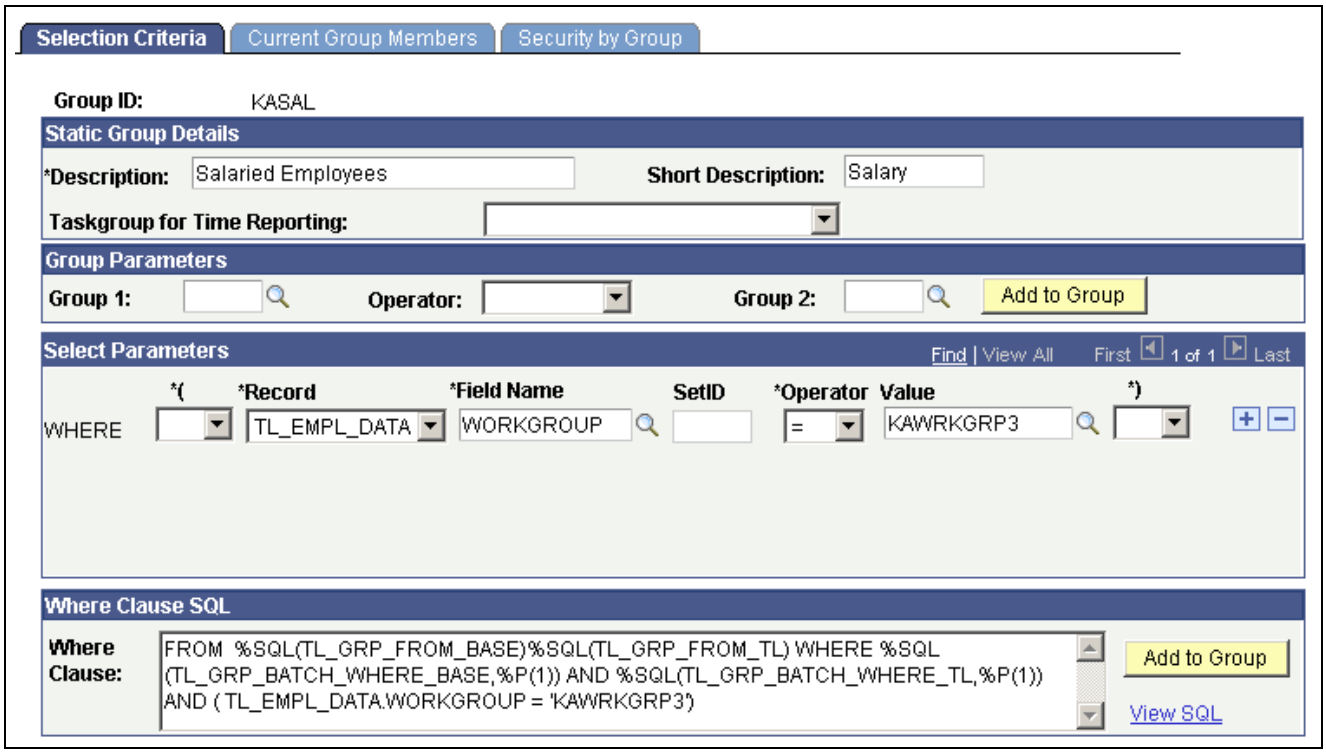
Pages Used to Create and Update Static Groups

Page Name	Object Name	Navigation	Usage
Static Group - Selection Criteria	TL_GROUP_S1	Set Up HRMS, Security, Time and Labor Security, Static Group, Selection Criteria	Specify the criteria for selecting group members.
Static Group - Current Group Members	TL_GROUP_S2	Set Up HRMS, Security, Time and Labor Security, Static Group, Current Group Members	View, update, and add comments to a list of the members of a static group.
Static Group - Security by Group	TL_GRP_SECURITY	Set Up HRMS, Security, Time and Labor Security, 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.

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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.

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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 these 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. You can choose any field from this record.

Field Name Select a field name. Only fields with access given on the Group Creation Security page are available. You can now define this field with any valid value as part of your selection criteria.

SetID If you select *Job* in the Record field and one of the following fields listed 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*.

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Add to Group Click Add to Group to add the time reporters that fit the criteria created to this static group. This button also updates 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 from which to choose. 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. Although you can type a value for any field in the Value field, the system may not return the expected results if the value is not unique. This table lists the fields whose values are dependent on other fields.

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
PERSONAL_DT_FST	BIRTHSTATE	BIRTHSTATE_VW	BIRTHCOUNTRY
TL_EMPL_DATA	TASK_PROFILE_ID	TL_TASKGRP_PRFL	TASKGROUP

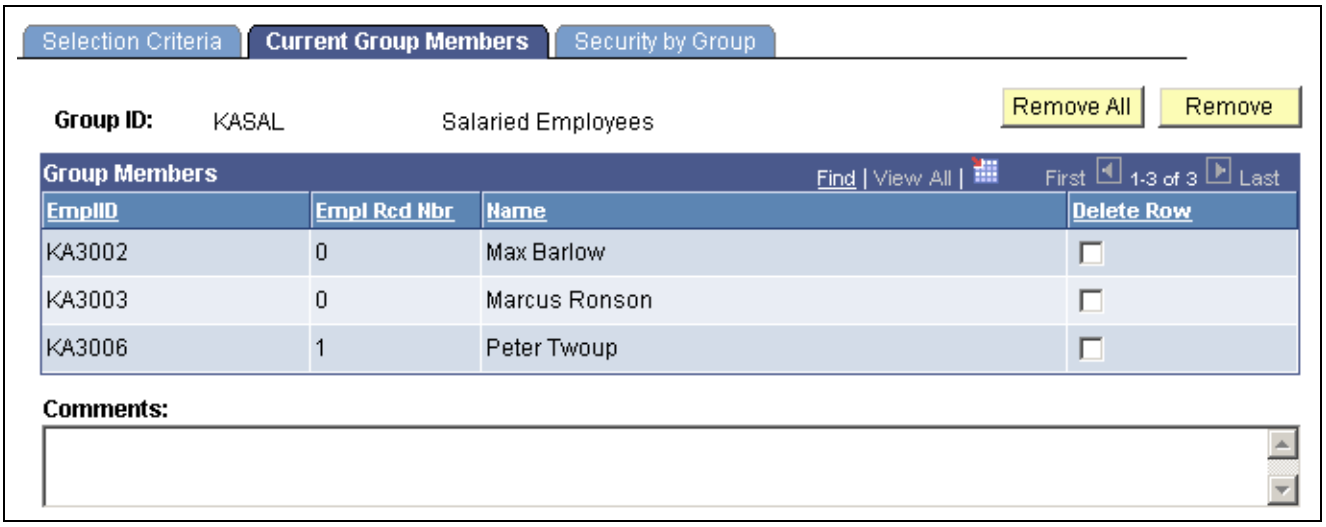
See Also

Chapter 7, “Defining Task Reporting Requirements,” page 123

Viewing and Updating Static Group Members

Access the Static Group - Current Group Members page.

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Static Group – Current Group Members

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

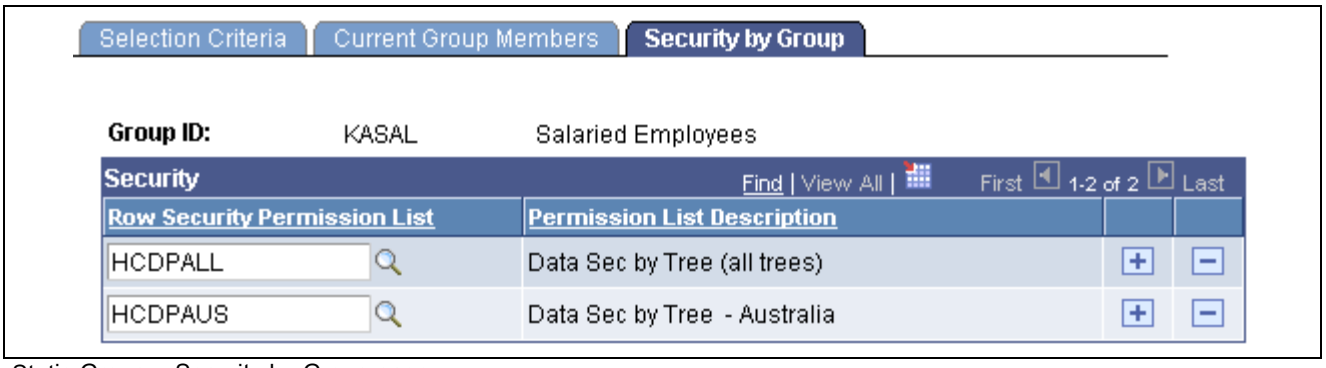
Delete Row To remove a member from the group, select the Delete Row check box to the right of the member's name.

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 grant users who are associated with the row-security permission list the authorization to edit and view data for the time reporters in the group.

Permission List Description The description of the row security permission list that you selected is displayed.

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Creating and Updating Dynamic Groups

To create or update dynamic groups, use the Dynamic Group (TL_DYNAM_GRP) and the Refresh Dynamic Group(s) (TL_RUN_GRP_REFRESH) components. Use the TL_DYNAM_GRP component interface to load data into the tables for this component.

This section discusses how to:

- Specify criteria for dynamic group members.
- Preview dynamic group members.
- Set up dynamic group security.
- View dynamic group members
- Update dynamic group membership.

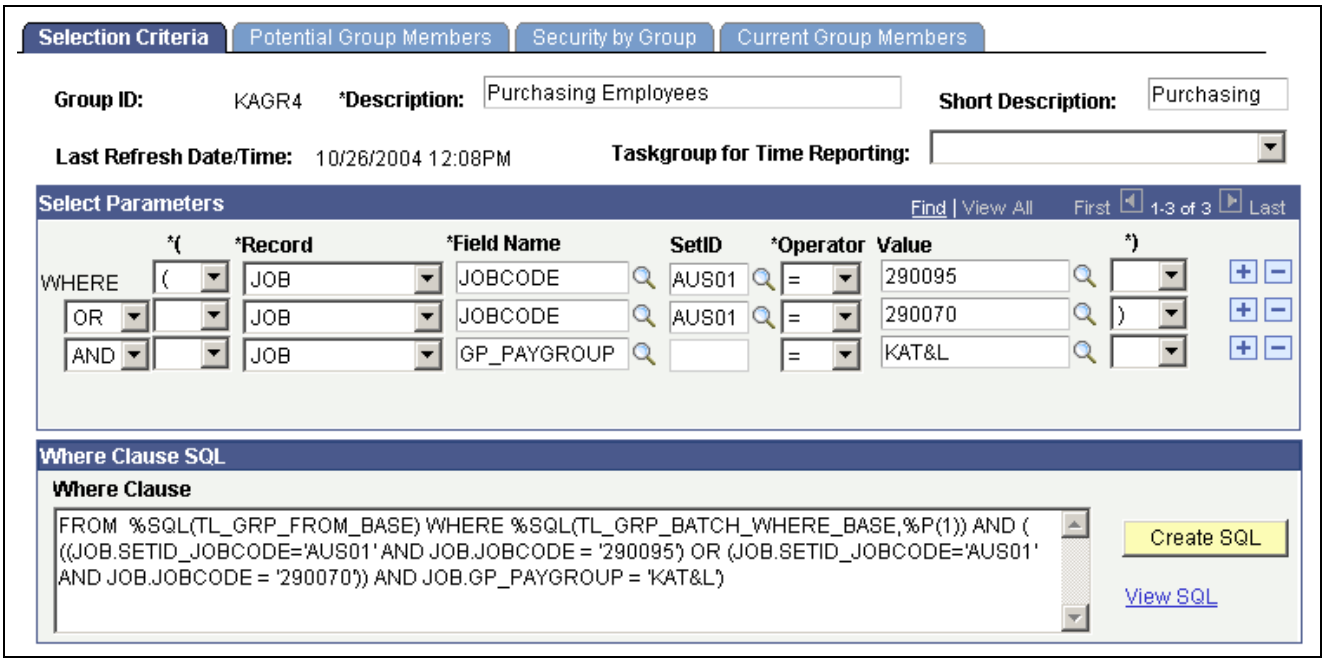
Pages Used to Create and Update Dynamic Groups

Page Name	Object Name	Navigation	Usage
Dynamic Group - Selection Criteria	TL_GROUP_D1	Set Up HRMS, Security, Time and Labor Security, Dynamic Group, Selection Criteria	Define the criteria to select members of the group.
Dynamic Group - Potential Group Members	TL_GROUP_D2	Set Up HRMS, Security, Time and Labor Security, Dynamic Group, Potential Group Members	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	Set Up HRMS, Security, Time and Labor Security, Dynamic Group, Security by Group	Specify which row-security permission lists can view and edit time reporting data for this group of time reporters.
Dynamic Group - Current Group Members	TL_GROUP_LIST	Set Up HRMS, Security, Time and Labor Security, Dynamic Group, Current Group Members tab	View the current members of a dynamic group. Refresh group membership.
Refresh Dynamic Group(s)	TL_RUN_GRP_REFRESH	Set Up HRMS, Security, Time and Labor Security, Refresh Dynamic Group, 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.

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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 following fields listed in the Field Name field, select the setID with which the field is associated. In all other cases, the SetID field is unavailable.

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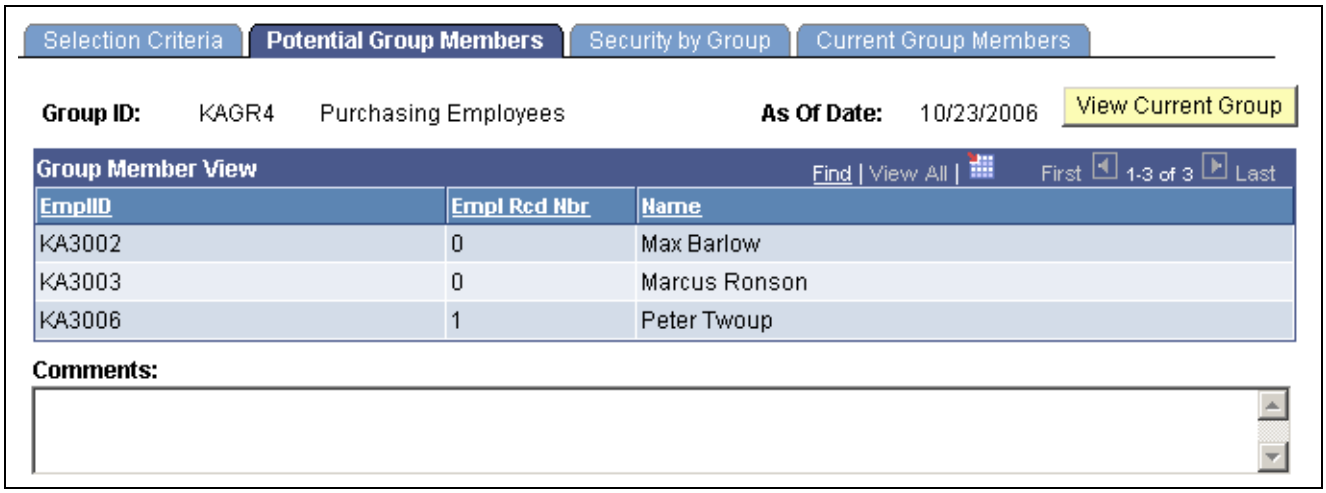
	SALARY_MATRIX_CD DEPTID JOBCODE LOCATION
Operator	If you want to perform a mathematical operation, select the appropriate symbol. Valid entries are: <, <=, <>, =, >, >=, and *LIKE*. If you select *LIKE,* you can enter a partial value in the Value field. For example, *S.*
Value	Select a value for the 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

Chapter 7, "Defining Task Reporting Requirements," page 123

Previewing Dynamic Group Members

Access the Dynamic Group - Potential Group Members page.



Dynamic Group - Potential Group Members page

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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

Chapter 9, "Establishing Static and Dynamic Groups," Setting Up Static Group Security, page 197

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

Updating Dynamic Group Membership

Access the Refresh Dynamic Groups page.

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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 previous date.

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CHAPTER 10

Setting Up Time Reporters

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

- Enter and maintain time reporter data.
- Maintain time reporter data.
- Assign and view compensatory time plans.
- Assign schedules to a group.

Understanding Time Reporter Data

Employees and non-employees do not automatically participate in the Time and Labor system when added to the 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.

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- 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 non-employee whose time is reported or generated through Time and Labor

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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:

- A time reporter can be inactivated as long as there is no time reported in *Approved Status* and when payable time is not in *Approved*, *Taken by Payroll*, *Sent to Payroll*, *Rejected by Payroll*, *Paid*, *Diluted*, *Closed*, or *No Pay* that is the same or after the effective date.
- If the Default from Workgroup check box on the Time and Labor 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.

  Note. Time that is reported for an inactive time reporter through Rapid, Mass or TCD creates high severity exceptions that the time reporter is inactive (for elapsed or punch time).

  The reported time is still populated for those days that the Mass Time, Rapid Time or TCD interface is submitted.

  The manager is able to delete the reported time using the Timesheet pages.

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:

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- 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 Time and Labor. You choose a method on the TL Installation page:

- Select the Default from Workgroup check box.

  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.

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.

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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 queue, which is delivered with PeopleSoft Integration Broker. This message inserts a row into the SCH_ASSIGN record when an employee is hired.

See Also

Chapter 8, "Defining Work Schedules," page 161

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Entering and Maintaining Time Reporter Data

To enter and maintain time reporter data, use the Create Time Reporter Data (TL_EMPL_DATA_C) and Maintain Time Reporter Data (TL_EMPL_DATA_M) components.

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.

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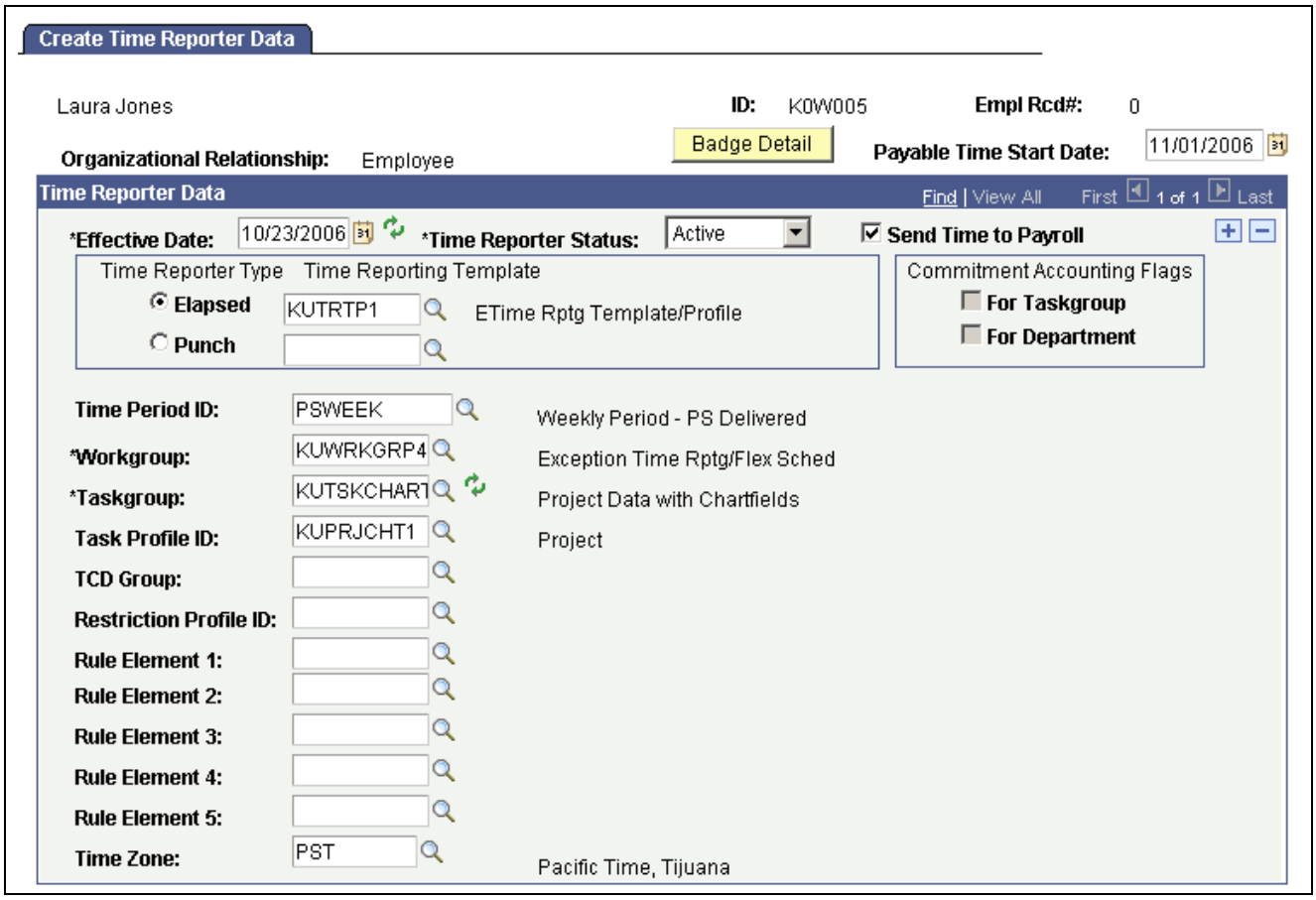
Pages Used to Enter and Maintain Time Reporter Data

Page Name	Object Name	Navigation	Usage
Create Time Reporter Data	TL_EMPL_DATA1	• Time and Labor, Enroll Time Reporters, Create Time Reporter Data, Create Time Reporter Data • Click the Time Reporter Data link on various pages accessible on the Workforce Administration menu.	Enroll a time reporter into the Time and Labor system. **Note.** The Time Reporter Data link appears on pages in the Human Resources Workforce menu only if you've selected Time and Labor on the General Installation Table.
Badge Detail	TL_BADGE_SEC	Time and Labor, Enroll Time Reporters, Create Time Reporter Data Click the Badge Detail button on the Create Time Reporter Data page.	Display badge information for a time reporter.
Maintain Time Reporter Data	TL_EMPL_DATA1	• Time and Labor, Enrollment Time Reporters, Maintain Time Reporter Data, Maintain Time Reporter Data • Click the Time Reporter Data link on various pages accessible on the Workforce Administration menu.	Update enrollment information for time reporters in Time and Labor. **Note.** The Time Reporter Data link appears on pages in the Human Resources Workforce menu only if you've selected Time and Labor on the General Installation Table.
Group Membership	TL_GRP_MEMBERSHIP	Click the Group Membership button on the Maintain Time Reporter Data page.	To view the list of groups that the time reporter is assigned to.

Enrolling Time Reporters

Access the Create Time Reporter Data page.

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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.

Note. As the Person Type and Personnel Status fields no longer exist in the database, the fields for the organizational relationship are displayed. These fields include Employee, Contingent Worker and Person of Interest.



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 Workforce Administration 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.

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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 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 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 non-employees, 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 Time and Labor with, and send this time reporter's payable time to, a payroll system.

If cleared, the Time Administration process converts the time reporter's reported time to payable time and sets the payable time status to *No Pay*.

If selected, and the time reporter's workgroup or the TRC that is used to report time does not need approval, reported time is converted to payable time with a status code of *Closed*.

See Chapter 14, "Understanding Payable Time," Payable Time Status and Reason Codes, page 389.

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.

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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 button 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.

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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.

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See Also

Chapter 7, “Defining Task Reporting Requirements,” Creating Task Profiles, page 153

Chapter 4, “Setting Up Basic Tables,” Time Zone Offsets Table, page 18

Chapter 12, “Creating Rules in Time Administration,” Defining Rule Elements, page 241

Chapter 5, “Establishing Workgroups,” page 75

Chapter 15, “Reporting Time,” page 407

Chapter 14, “Understanding Payable Time,” page 387

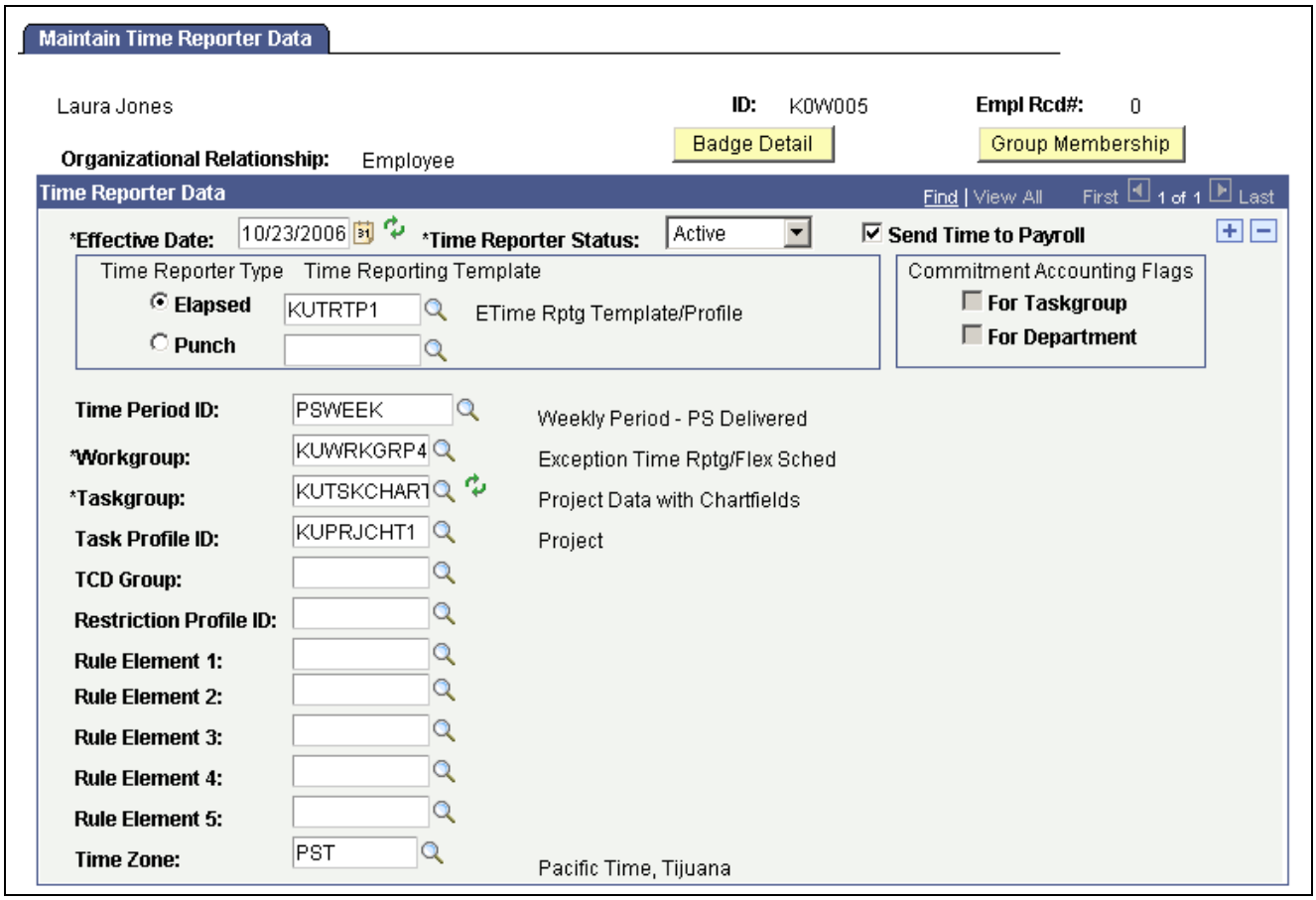
Chapter 13, “Understanding the Batch Process in Time Administration,” Understanding Time Reporter Status, page 370

Chapter 16, “Using Time Collection Devices,” page 425

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Commitment Accounting, “Understanding Manage Commitment Accounting,” Understanding the Commitment Accounting Business Process

Updating Time Reporter Data

Access the Maintain Time Reporter Data page.



Maintain Time Reporter Data page

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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 Human Resources has no effect on the time reporter status. If a time reporter is terminated, update the employee status through 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.

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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 Clearing the Send Time to Payroll Check Box	Impact of Selecting the Send Time to Payroll Check Box
Estimated	Time remains in *Estimated* status. It is not picked up by a payroll system, set to *Closed* status, or published to Project Costing. Use SQL to change the payable status to Needs Approval (NA).	Not applicable.
Needs Approval	Payable status is set to *Closed* or *No Pay* during online or batch approval.	Payable status is be set to *Approved − Goes to Payroll* when time is approved 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 Project Costing. Use SQL to change the payable status and publish the time to Project Costing.	Not applicable.
Closed or *No Pay*	Time remains in *Closed* or *No Pay* 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 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 Project Costing a second time. If there's a difference between the original estimated gross amount and the new amount, only the difference is published.

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Payable Status of Payable Time	Impact of Clearing the Send Time to Payroll Check Box	Impact of Selecting the Send Time to Payroll Check Box
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* *No Pay* *Ignore*	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 Time and Labor to keep the date in both applications synchronized.	Not applicable.

See Also

Appendix C, "Referential Integrity," Time Administration and Referential Integrity, page 740

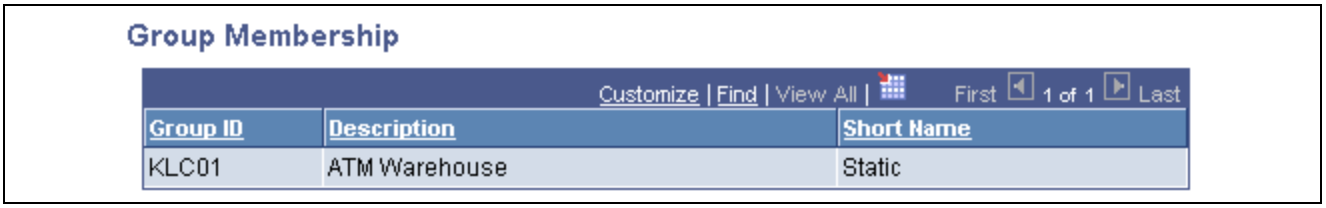
Chapter 16, "Using Time Collection Devices," Sending Setup Data to a TCD, page 443

Chapter 14, "Understanding Payable Time," page 387

Chapter 5, "Establishing Workgroups," Making Workgroup Transfers, page 97

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.

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See Also

Chapter 9, “Establishing Static and Dynamic Groups,” page 189

Assigning and Viewing Compensatory Time Plans

Assigning and Viewing Compensatory Time Plans comprises the following tasks:

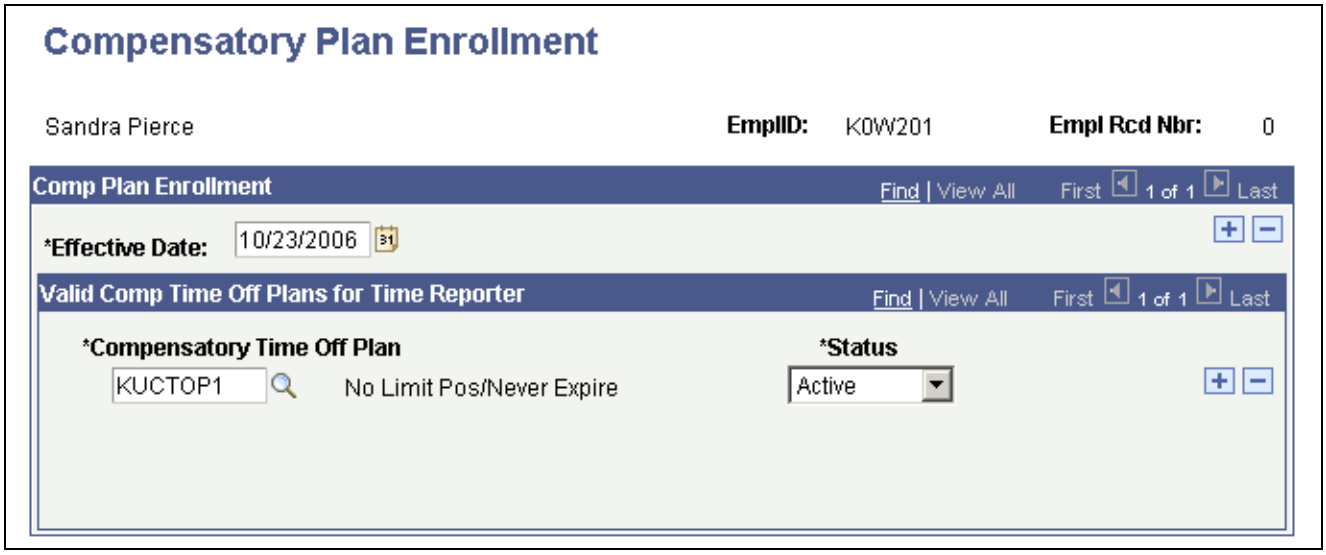
- Enrolling time reporters in a compensatory time plan.
- Viewing the compensatory time plan history for time reporters.

Pages Used to Assign and View Compensatory Time Plans

Page Name	Object Name	Navigation	Usage
Compensatory Plan Enrollment	TL_EMPL_COMP	Time and Labor, Enroll Time Reporters, Comp Plan Enrollment, Compensatory Plan Enrollment	• To enroll a time reporter in one or more compensatory plans. • View compensatory time plans that have the same effective date.
View Time Reporter Comp Plans	TL_TR_COMP_PLAN_VW	Time and Labor, Enroll Time Reporters, Comp Plan History, View Time Reporter Comp Plans	View the history of compensatory time plan assignments for a specific time reporter.

Enrolling Time Reporters in a Compensatory Time Plan

Access the Compensatory Plan Enrollment page.



Compensatory 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

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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".

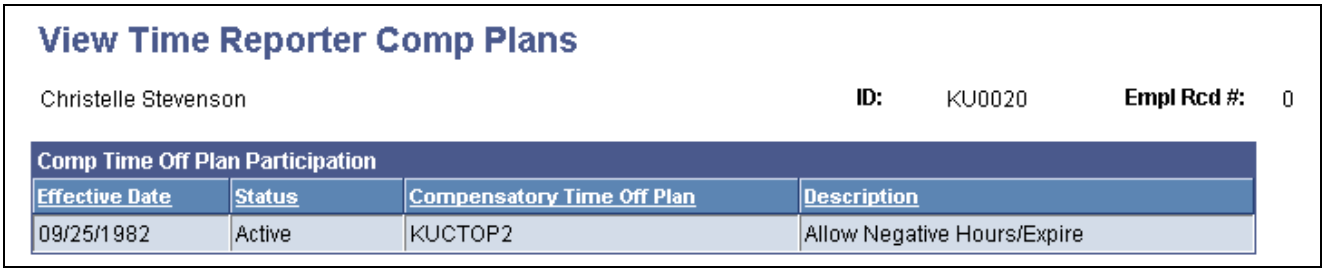
Status

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 Time Reporter Comp Plans page.



View Time Reporter 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 to a Group

This section discusses how to assign group schedules.

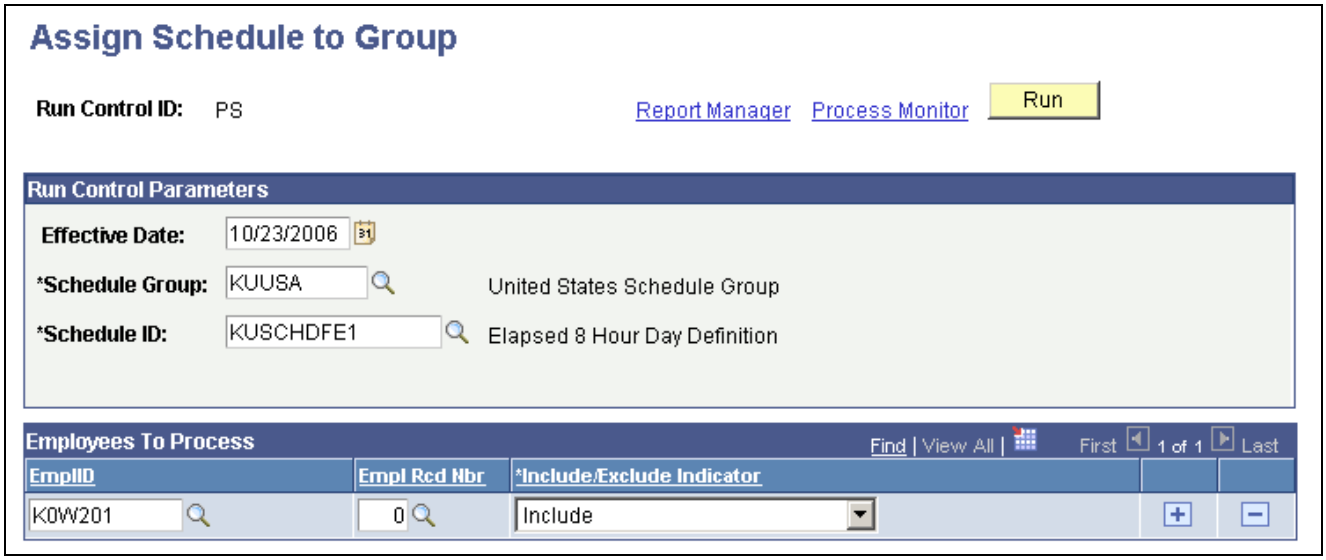
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Pages Used to Assign Schedules

Page Name	Object Name	Navigation	Usage
Assign Schedule To Group	SCH_GRP_ASSIGN	Set Up HRMS, Product Related, Time and Labor, Schedules, Assign Schedule to Group, Assign Schedule To Group Time and Labor, Enroll Time Reporters, Assign Schedule to Group, Assign Schedule To Group	Assign a group of time reporters or a single time reporter to a schedule.

Assign Schedule to a Group

Access the Assign Schedule To Group page.



Assign Schedule To Group page

Schedule Group Select the schedule group you require.

Schedule ID Select the schedule that you are assigning. The system only displays related values based on the Schedule Group selected.

Rotation ID If you select a rotating schedule, as well as assigning the Schedule ID, you also need to assign a Rotation ID.

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

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

Group ID Select the dynamic or static group for which you want 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 is excluded from the

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group schedule assignment. The order in which you add rows does not affect the result.

See Also

Chapter 8, “Defining Work Schedules,” Creating Work Schedules and Schedule Definitions, page 164

Chapter 22, “Using Manager Self-Service for Scheduling Components,” Assigning Schedules, page 630

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CHAPTER 11

Establishing Time and Labor Security

This chapter provides an overview of row security permission lists and discusses how to use 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 HRMS Data Permission 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.

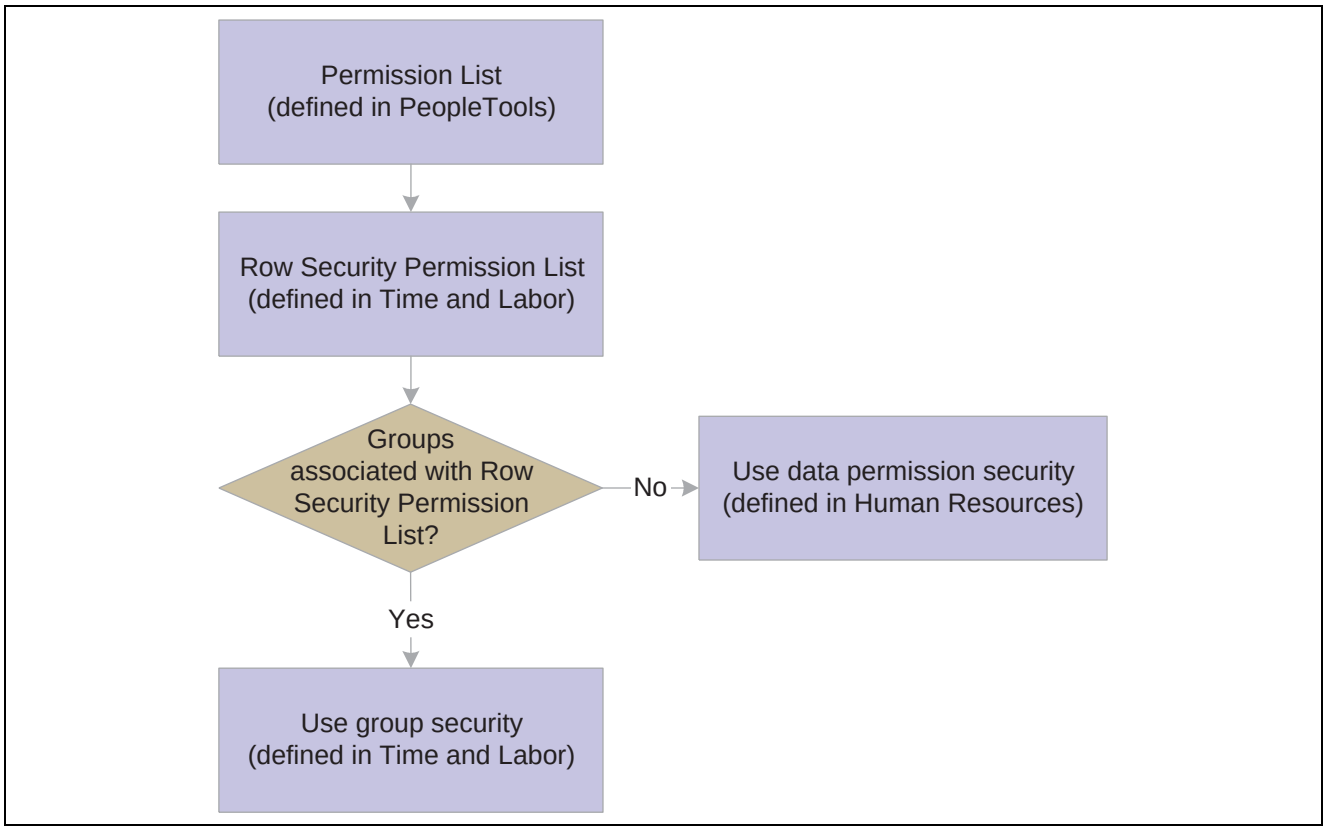
When you open the Mass Time, TL Launch Pad, or any other page to enter or display time, the list of available time reporters depends on whether you are using group or HRMS data permission security.

- 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 HRMS data permission security.

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

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Time and Labor 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 future time entries.
- Make prior period adjustments within a limited time frame.
- Edit data for certain groups of time reporters.

See Also

Chapter 9, "Establishing Static and Dynamic Groups," page 189

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Using Row Security Permission Lists

To create row security permission lists, use the TL Permission List Security (TL_GRP_SECURITY) component.

This section discusses how to:

- Create row security permission lists.
- View row security users.

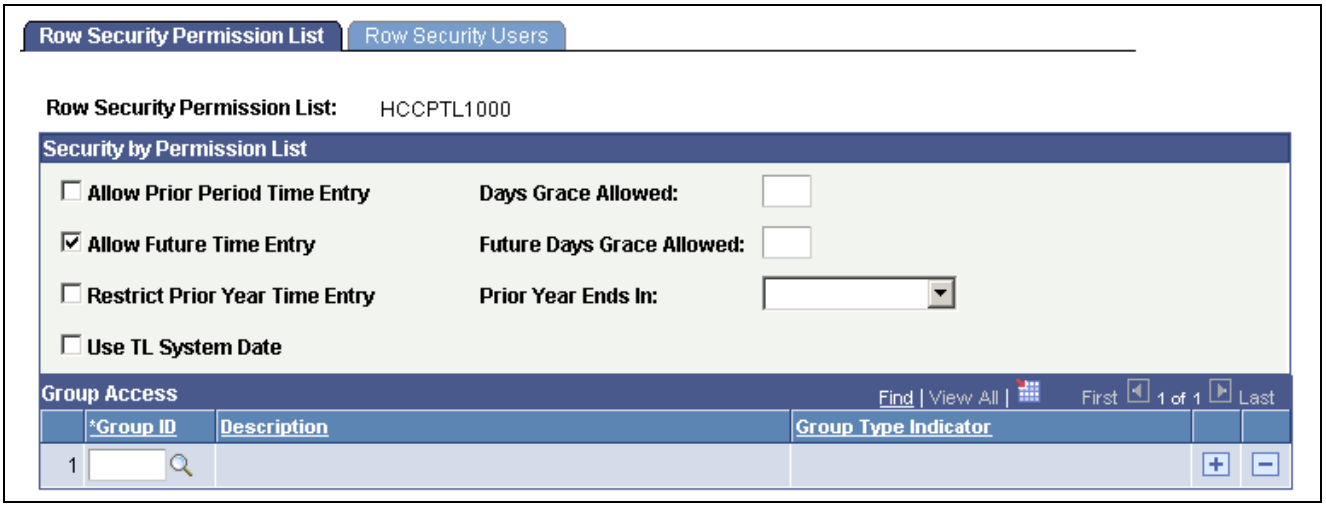
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Pages Used for Using Row Security Permission Lists

Page Name	Object Name	Navigation	Usage
Row Security Permission List	TL_SECURITY_PNL	Set Up HRMS, Security, Time and Labor Security, TL Permission List Security, Row Security Permission List	Create security that limits a user's ability to access and update data for groups of time reporters.
Row Security Users	TL_ROWSEC_MEMBERS	Set Up HRMS, Security, Time and Labor Security, TL Permission List Security, Row Security Users tab	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

Allow Prior Period Time Entry

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 August 16, 2004, and you want to enter time for August 1, 2004. 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 the dates August 16 to 22. Any time

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reported before August 16 (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

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.

For example, assume the following:

- Days grace allowed = 30
- Current date = June 23, 2004
- Time period = weekly
- Date for which time is to be reported = May 15, 2004

First, the system subtracts the grace period from the current date: June 23, 2004 − 30 days = May 25, 2004. Next, it looks at the time period calendar to determine the start date of the weekly time period in which May 25, 2004, occurs, which is May 23, 2004. Therefore, users can enter or edit time for any date greater than or equal to May 23, 2004.

If you leave the Days Grace Allowed field cleared, users can enter or edit time in any previous period.

Allow Future Time Entry

Select to give users associated with this permission list the ability to enter future time entries for members of the groups identified in the Group Access grid.

A future time entry is a time entry for a date that falls after the end date of the time reporter's current period.

To determine if the time you're entering is for a future period, 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 entry falls. Any entry made for a date following the end date of the current period is a future period.

For example, assume that today is August 16, 2004, and you want to enter time for September 1, 2004. The time reporter is assigned a weekly time period. The system references the time period calendar to determine that today's date occurs within the weekly time period August 16 to 22. Any time reported after August 22 (the end date of the current period) occurs in a future period.

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.

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Future Days Grace Allowed Use this field to limit the period of time during which users can enter future period entries.

Enter the number of days that the system uses to calculate the latest date for which users can enter future period entries. During time reporting, the system adds this number to the current date and compares the resulting date to the time period calendar to find the end date of the time period in which the calculated date occurs.

For example, assume the following:

- Days grace allowed = 30
- Current date = June 21, 2004
- Time period = weekly
- Date for which time is to be reported = July 15, 2004

First, the system adds the grace period to the current date: June 21, 2004 + 30 days = July 21, 2004. Next, it looks at the time period calendar to determine the end date of the weekly time period in which July 21, 2004 occurs, which is July 24, 2004. Therefore, users can enter or edit time for any date less than or equal to July 24, 2004.

If you leave the Days Grace Allowed field cleared, users can enter or edit time in any future period.

Restrict Prior Year Time Entry Select to give users associated with this permission list the ability to enter prior period adjustments as far back as the beginning of the year for members of the groups identified in the Group Access grid.

Prior Year Ends In If the Prior Year Ends In field is selected, chose the month that the year ends in. The system will restrict time entry access, prior to and including the selected month end date.

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 considers 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

Chapter 9, “Establishing Static and Dynamic Groups,” Creating and Updating Dynamic Groups, page 198

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Viewing Row Security Users

Access the 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 IDs in the User Profiles component on the PeopleTools menu.

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CHAPTER 12

Creating Rules in Time Administration

This chapter provides overviews of time administration and rules, and discusses how to:

- Create value lists.
- Define rule elements.
- Specify table access.
- Define table relationships.
- Define template-built rules.
- Create rules with actions and conditions.
- Create SQL objects.
- Work with User Exits.
- Define attendance programs.
- Assemble rules.
- Add rules to a rule program.

Understanding Time Administration

This section discusses:

- The create rules component
- The batch processing component
- The online processing component

Although the Time Administration processes are complex and varied, the Time Administration business process has these main components:

Create Rules — The Create Rules component 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 — The Time Administration batch processing component applies the rules to time reporter data and generates payable time from reported and scheduled time.

Online Processing — From the Timesheet, the Apply Online Rules process immediately applies your online rules to the time for a specific time reporter.

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Create Rules Component

The Create Rules component has these online tools for defining rules:

Templates Use templates to create a variety of rules for the Time Administration program to execute when processing reported and scheduled time. Create compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for other time reporting that requires special processing. There are more than 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 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 scan 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 AE 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

Chapter 12, “Creating Rules in Time Administration,” Defining Template-Built Rules, page 246

Chapter 12, “Creating Rules in Time Administration,” Creating Rules with Actions and Conditions, page 273

Chapter 12, “Creating Rules in Time Administration,” Creating SQL Objects, page 283

Enterprise PeopleTools PeopleBook: Application Engine

Batch Processing Component

The batch process in Time and Labor generates payable time. It executes the rules defined using the Time and Labor 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.

See Also

Chapter 13, “Understanding the Batch Process in Time Administration,” page 315

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Online Processing Component

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 the Timesheet 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 Time and Labor 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 a day, week, or specified time period and will display the results accordingly.

When you define a rule for both online and batch use, be sure the time period that the rule evaluates will handle day, week and time periods that may be defined on the timesheet. 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*(ES) or *Needs Approval* (NA) payable status.

To create actual payable time, run your rules as part of the Time Administration batch 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 these 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.
- Update of TA_STATUS and EARLIEST_CHGDT.

Understanding Rules

This section discusses:

- General setup steps.
- Rules from actions and conditions and SQL objects.
- Rule step creation guidelines.

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All rules in Time and Labor are written in SQL. You don't have to be a SQL expert to create rules because you will probably create most rules using templates, and the templates contain the basic logic, underlying structures, and necessary SQL objects. However, an understanding of SQL is helpful, 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

Perform these two setup steps before creating rules if you are using either actions and conditions, or SQL objects to define the rules:

- Specify which tables (or records) to access and which SQL actions rule's developers can access.

  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

Chapter 12, "Creating Rules in Time Administration," Specifying Table Access, page 242

Chapter 12, "Creating Rules in Time Administration," Creating SQL Objects, page 283

Rules from Actions and Conditions and SQL Objects

When you use the Actions and Conditions or the SQL Objects pages, you won't create complete rules, but the building blocks of rules: rule components. To define a complete rule, you must:

- Link the 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.
- Group rules into rule programs and then link these rules to time reporters through workgroups.

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 a rule definition:

1. Define the rule components.

   Use Actions and Conditions or SQL Objects.

2. Define the rule period.

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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 define 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 are 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 is processed using that rule.

See Also

Chapter 12, "Creating Rules in Time Administration," Creating Rules with Actions and Conditions, page 273

Chapter 12, "Creating Rules in Time Administration," Creating SQL Objects, page 283

Chapter 5, "Establishing Workgroups," page 75

Chapter 12, "Creating Rules in Time Administration," Assembling Rules, page 305

Rule Step Creation Guidelines

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When you create rules in Time Administration, you translate the organization's business rules into SQL statements for the system. The Time Administration pages enable you to implement rules, but they are not design tools. 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.

Design and Organize 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 to reuse. If you can use part of a rule repeatedly or in many ways, create an action or condition or a 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, 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 columns. 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 do not function properly and may generate unexpected results.

Translate Business Rules into SQL Rules

Before you create rules in Time and Labor, have a clear idea of how you manage both time and time reporters, and have the business rules in front of you when you begin. 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.

Use Working Tables within 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 to protect the integrity of the source data. The Intermediate Payable Time data store comprises these five tables:

- TL_IPT1
- TL_IPT2

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- 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, remember that:

- Time Administration automatically loads much of the data for executing rules into the Intermediate Payable Time table TL_IPT1.

  In the rules, you can move data back and forth between this table and the other Intermediate Payable Time tables. For example, the rule can 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.

- You must decide when and how to move data from TL_IPT1 to other working tables.

  After the rules process and modify the data in other tables, return any processed data to send to Payable Time back to TL_IPT1, which is the table containing 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 before 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 the rules. If you delete this data, the rules have nothing to process.

- You can move data from external tables (nonworking tables) into working tables.

  If you do not plan to process or modify this data, but you 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 can affect processing speed.

Example: Translating Business Rules into SQL Rules

This example illustrates how to translate 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 Time and Labor terms. For example, you recognize that the rate of 1.5 times the normal rate implies a different (overtime) TRC. 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 the system will 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.

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Note. If your business rules require you to store the original rows and add rows only where the TRC changes, you would create an insert action.

Next, consider what conditions exist in the 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 these tables represent Intermediate Payable Time created by these rule steps. Changes to the original TL_IPT1 data are in italics:

Data in IPT1

This table lists the 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
Saturday	6	52	REG

Data in IPT2

This table lists the data in IPT2:

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Day	Hours	Total Week Hours	TRC
Friday	*4*	40	REG
Friday	6	46	*OT 1.5*

Data in IPT3

This table lists the data in IPT3:

Day	Hours	Total Week Hours	TRC
Saturday	6	52	*OT 1.5*

Data in IPT1 After Processing

This table lists the data in IPT1 after processing:

Day	Hours	Total Week Hours	TRC
Monday	8	8	REG
Tuesday	10	18	REG
Wednesday	8	26	REG
Thursday	10	36	REG
Friday	4	40	REG
Friday	6	46	OT1.5
Saturday	6	52	OT1.5

Note. This simple example ignores the TRC. A more complicated example could also include a daily rule run before this and might also create overtime.

Using Value Lists within Rules

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.

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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. For 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 are used within template-built rules.

This 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

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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 are 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.

Example: Defining and Using Rule Elements

You define a rule element called Jobs. You also create these values for Jobs: HOST, CASHIER, ASST MGR, WAITER. Next, 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 is 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.

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. 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 Time and Labor are PeopleTools meta-SQL constructs that are processed at run time.

Common HR Data in Rules

To use Human Resources or 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.

Warning! 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 these source tables:

#	Field Name	Source	Description
1	EMPLID	TL_EMPL_DATA	Employee identification number.
2	EMPL_RCD	TL_EMPL_DATA	Employee record number.

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#	Field Name	Source	Description
3	NAME	PERSONAL_DATA	Employee name.
4	EFFDT	BADGE_TBL	Effective date of the badge.
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.

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#	Field Name	Source	Description
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.

Prioritizing Rules in Rule Programs

Consider rule priority when dependencies exist among the rules in a rule program. For example, you've defined these rules for the organization:

- Default TRC: Set any blank TRC to REG.
- Daily 8: Pay overtime (OT1.5) for hours worked in excess of 8.0 per day.
- Daily 12: Pay double time (OT2.0) for hours in excess of 12 per day.
- Weekly 40: Pay overtime (OT1.5) for hours worked in excess of 40 per week.

In this example, the second, third, and fourth rules evaluate time with a TRC of REG. In addition, they are replace-type rules, for which REG is reduced to the threshold number and a new TRC is created for the excess hours. Based on this information, order your rule program as follows:

1. Default TRC

   Other rules must evaluate TRC REG.

2. Daily 12

   This must execute before the Daily 8 rule because REG is set to 12 if hours are over 12. If the Daily 8 rule runs first, the Daily 12 rule does not generate double time because all records with hours over 12 are set to 8.

3. Daily 8

   Daily 12 reduces hours in excess of 12 to 12.

4. Weekly 40

   Executed last because it needs to capture all the REG hours (including REG hours that are reduced by daily rules and REG hours that are not altered by daily rules).

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Time Period Selection 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.

Rules Testing

Always test any rule you create using an interactive SQL tool. Otherwise, the system could generate incorrect results when it processes the 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

Chapter 10, "Setting Up Time Reporters," page 203

Chapter 12, "Creating Rules in Time Administration," Creating Rules with Actions and Conditions, page 273

Chapter 13, "Understanding the Batch Process in Time Administration," Step 5: Building Time Reporter Profiles, page 346

Chapter 4, "Setting Up Basic Tables," Establishing Time Periods, page 43

Chapter 5, "Establishing Workgroups," Setting Up Day Breaker Options, page 89

Chapter 12, "Creating Rules in Time Administration," Creating Rules from A Template, page 266

Creating Value Lists

To create value lists, use the Value List (TL_VALUE_LST_PNL) component.

This section discusses how to group codes into value lists.

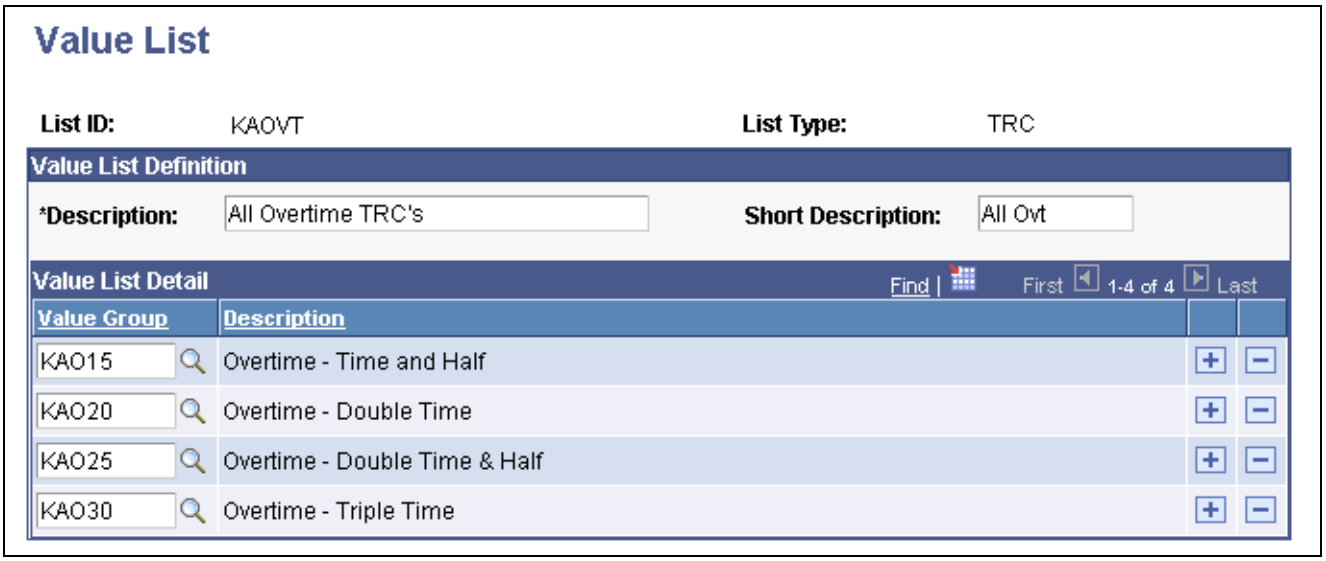
Page Used to Create Value Lists

Page Name	Object Name	Navigation	Usage
Value List	TL_VALUE_LST_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Value List, Value List	Group codes for rules processing.

Grouping Codes Into Value Lists

Access the Value List page.

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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

To define rule elements, use the Rule Element 1 through Rule Element 5 (TL_RULE_ELEM1_PNL, TL_RULE_ELEM2_PNL, TL_RULE_ELEM3_PNL, TL_RULE_ELEM4_PNL and TL_RULE_ELEM5_PNL) components. Use the TL_RULE_ELEM1_PNL, TL_RULE_ELEM2_PNL, TL_RULE_ELEM3_PNL, TL_RULE_ELEM4_PNL and TL_RULE_ELEM5_PNL component interfaces to load data into the tables for these components.

This section discusses how to create user-defined rule elements.

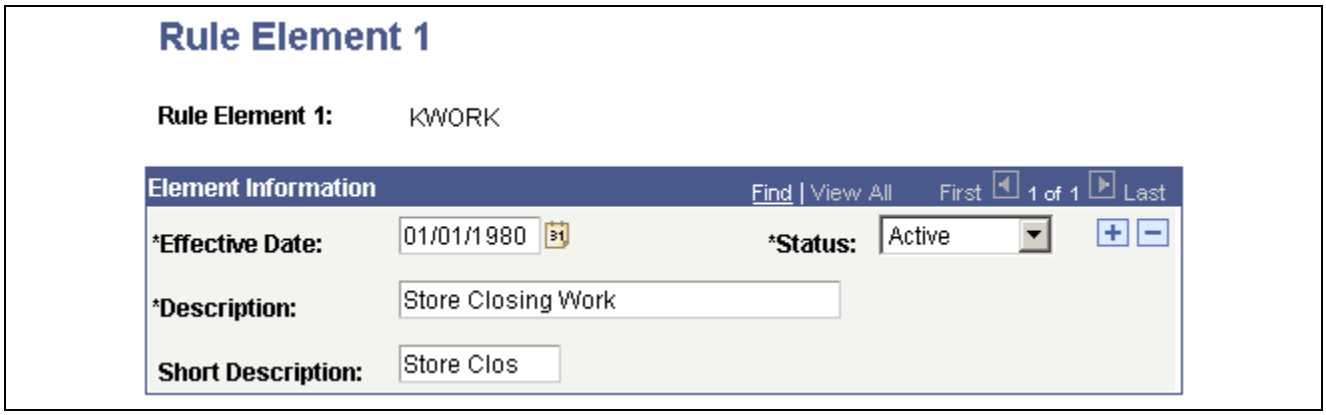
Page Used to Define Rule Elements

Page Name	Object Name	Navigation	Usage
Rule Element 1 through Rule Element 5	TL_RULE_ELEM1_PNL, TL_RULE_ELEM2_PNL, TL_RULE_ELEM3_PNL, TL_RULE_ELEM4_PNL, TL_RULE_ELEM5_PNL	Set Up HRMS, Product Related, Time and Labor, Task Elements, Rule Element 1 through Rule Element 5, Rule Element 1 through Rule Element 5	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.

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Rule Element 1 page

Note. If you want to relabel the rule element fields, see the instructions in your PeopleTools PeopleBook.

Specifying Table Access

To specify table access, use the Working Tables (TL_TA_WORK) component.

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 Time and Labor and Human Resources.

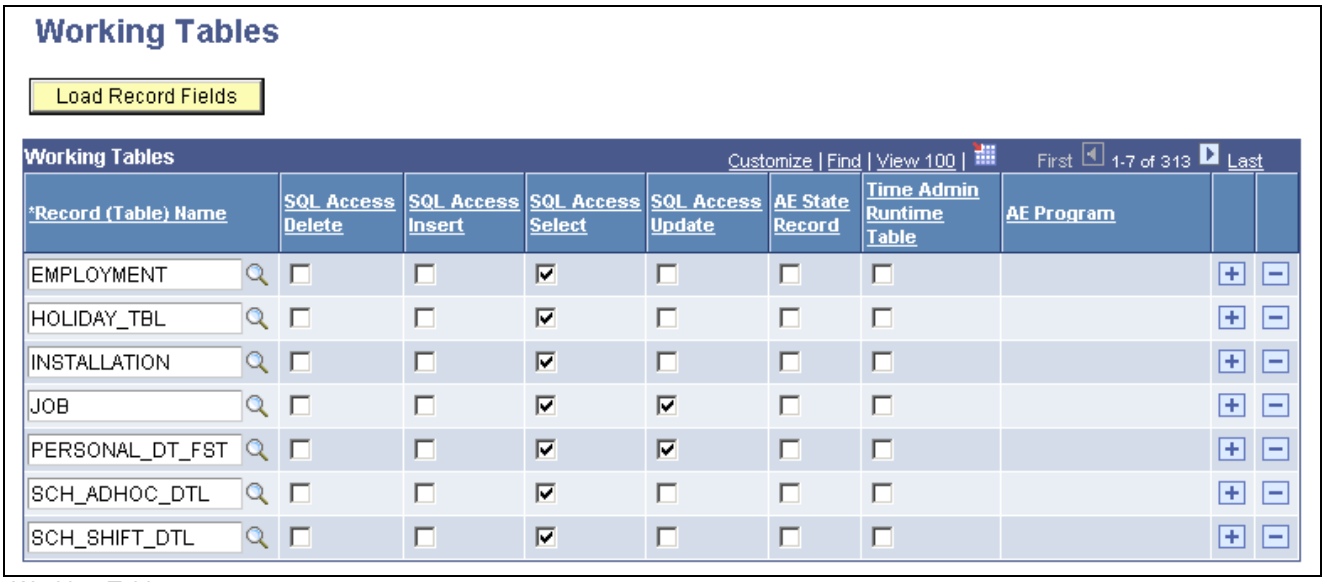
Page Used to Grant SQL Access to Tables

Page Name	Object Name	Navigation	Usage
Working Tables	TL_TA_WORK_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Working Tables, Working Tables	Grant SQL access to tables in the Time and Labor and Human Resources systems.

Granting SQL Access to Tables

Access the Working Tables page.

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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 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 Select 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 Select to insert rows in the table listed in the Record (Table) Name field.

SQL Access Select Select to select fields in the table listed in the Record (Table) Name field.

SQL Access Update Select to update rows in the table listed in the Record (Table) Name field.

Additional Elements

AE State Record (application engine state record) The check boxes 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.

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Time Admin Runtime Table (time administration runtime table)

The check boxes 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: within the loop Time Administration runs for each batch and at the beginning of the 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 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 the rules.

Working Tables

All working tables that are truncated during batch processing must be identified on the Working Tables page and marked as Time Administration Runtime tables. If a runtime table is not listed in the Working Tables page and is not defined for deletion, it isn't truncated during the batch run. The Working Tables page 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 page and specify the AE program that they belong to.

Defining Table Relationships

To define table relationships, use the Relationship Definitions (TL_RELATIONSHIP) component.

Defining table relationships consists of joining fields on different record tables.

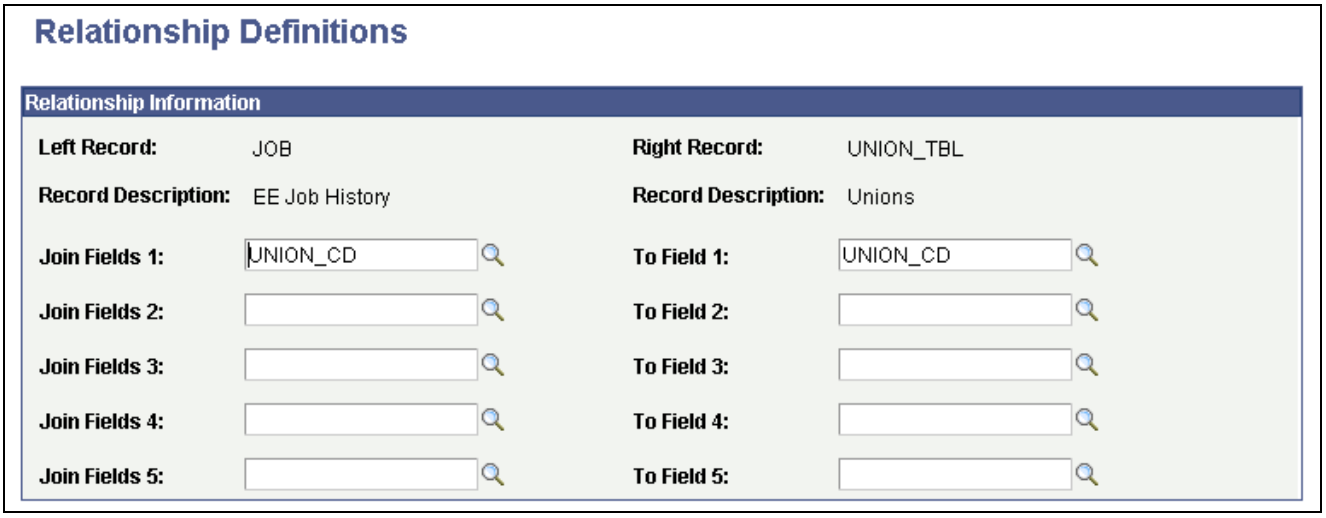
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Page Used to Define Table Relationships

Page Name	Object Name	Navigation	Usage
Relationship Definitions	TL_RELATIONSHIP	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Relationship Definitions, Relationship Definitions	Create relationships between tables.

Creating Table Relationship Definitions

Access the Relationship Definitions page.



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 eight hours per day under TRC REG, change REG to DBL.

The action for this statement is:

```
UPDATE PS_TL_IPT1
SET TRC = 'DBL'
```

The two conditions for this statement are:

```
WHERE PS_TL_IPT1.TRC = 'REG'
AND PS_JOB.UNION_CD = 'ABC'
```

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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

To define template-built rules, use the Template-Built Rules (TL_TA_RULE_TMPLT) component.

Time and Labor delivers more than 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 other time-reporting situations that require 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 the 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 a rule, open Template020, enter values for variables *a, b, c,* and *d,* and then save the new rule with a unique rule ID. Add the rule to a rule program on the Rule Programs page and assign the rule program to a workgroup.

Rules Created with Templates

After you save a template-built 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 with a unique rule ID, the rule is compiled and the values you entered are stored in the record TL_TMPLT_RULE2, replacing a generic *rule parameter* in the template called %RuleTemplate(), which acts as a placeholder for each variable you defined. (A rule parameter is a variable that is substituted with a user-defined value when a template-built rule is compiled.) The record TL_TMPLT_RULE2 tracks the values that will be resolved in each rule step by rule ID. 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 in a single rule step, the record TL_TMPLT_RULE2 identifies the different occurrences of %RuleTemplate by step and sequence number.

You have several options for modifying a rule you have defined using the Define Template-Built Rules component:

1. 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. 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

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Define Rules component; you can no longer access the rule through the Define Template-Built Rules component.

Although this modification 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:

- To add a new step to a rule or change 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.
- To delete a step, recompile the rule; you do not need to worry about the connection being broken.

Note. When modifying a rule, always test the rule to make sure that it functions as you expect.

3. 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 retain the original rule, 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 the data generated by the original rule. After saving the new rule, be sure to update the appropriate rule program.

Example: Multiple Jobs and Rules

This example shows a Daily Overtime Rule and a Period Threshold rule, and shows how the overtime hours for *all* jobs are calculated:

Daily Overtime: The system totals the overtime for the day, checks where the threshold falls, and applies it to the job accordingly.

Note. In this example, overtime is defined as any time over eight hours.

Empl Rcd #	Reported Hours	Overtime
0	0	0
1	5	0
2	2	0
3	3	2

Weekly Overtime:

Note. In this example, overtime is defined as any time over 40 hours.

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Empl Rcd #	Monday	Tuesday	Wednesday	Thursday	Friday
0			2	8	
1			8	2	
2	5	5		5	
3	3	3			9
Total Hours	8	8	10	15	9

Delivered Templates

The following tables list the rule templates delivered with 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 510	Determines if overtime hours exceeds a specified value. (Create or Replace.) This template is not available for online rules.	When a time reporter reports time under TRC(s) (1)SPECIFIED_TRCs and the sum of hours from ((1)SPECIFIED_ TRCs + Accumulator TRC (2)SPECIFIED_ ACCUMULATOR) is in the (3)SPECIFIED_PERIOD period, and 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

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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. On the Template Header page, the default setting for the Time Period ID field is "NONE." This template is not available for online rules.	When a time reporter reports time under TRC(s) (1)SPECIFIED_TRCs, then store the sum of hours into the (2)SPECIFIED_ ACCUMULATOR Accumulator TRC.	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. On the Template Header page, the default setting for the Time Period ID field is "NONE." This template is not available for online rules.	Load (1)SPECIFIED_ ACCUMULATOR Accumulator TRC from the Accumulator Table (TL_IPT1_CNT) into the Rules working table (TL_IPT1) for processing.	N	Both
Template 550	Similar to Period Threshold Template 020, but the threshold is determined by another TRC List. This template is not available for online rules.	When the hours of Accumulator TRC (1)SPECIFIED_ ACCUMULATOR are greater than the hours of Accumulator TRC (2)SPECIFIED_ ACCUMULATOR, in the specified period (3)SPECIFIED_PERIOD, then all hours in excess of Accumulator TRC (2)SPECIFIED ACCUMULATOR will be paid under (4)SPECIFIED_TRC TRC. The value of Accumulator TRC (2)SPECIFIED_ ACCUMULATOR is the threshold for comparison.	Y	Both

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Approval Required Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 180	All time reported to specific TRC or TRC list requires manager approval before 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. Use this template to require approval for time reported to a specific TRC or list of TRCs, rather than 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. Use this template to compensate employees reporting elapsed time for perfect attendance.	N	Elapsed

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 360A	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. Use this template to compensate employees reporting punch time for perfect attendance.	N	Punch
Template 360B	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_DURATION days, create (3)SPECIFIED_HOURS hours of TRC (4)SPECIFIED_TRC. Use this template 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
Template 110	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_DURATION consecutive days, then all time reported for day (3)SPECIFIED_DURATION will be paid under TRC (4)SPECIFIED_TRC.	Y	Both

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 111	If a time reporter works x consecutive days, then all hrs < 8 on the seventh day are paid specific TRC, while all hrs > 8 on the seventh day are paid another specified TRC. (California 7 Day Rule.) (Create or replace.)	When a time reporter works seven consecutive days in the state of California and reports time under TRCs (1)SPECIFIED_TRC_LIST in a given workweek, the first 8.0 hours worked on the seventh day are paid as overtime (time and a half) under TRC (2)SPECIFIED_TRC1, while hours worked on the seventh day in excess of 8.0 are paid as double time under TRC (3)SPECIFIED_TRC2.	Y	Both
Template 120	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 is paid under TRC (4)SPECIFIED_TRC.	Y	Both

Daily Threshold Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 010	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 are paid under (3)SPECIFIED_TRC TRC.	Y	Both

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Default Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 130	Replace all hours reported without a time reporting code to x.	Assigns any hours without a TRC to TRC (1)SPECIFIED_TRC.	N	Both
Template 135	Replace or remove the Time Reporting Code for the indicated punch types with the specified TRC. Only an hours type TRC can be chosen for this rule.	Replaces the Time Reporting Code (TRC) entered with the specified hours type TRC: (1) PUNCH_TYPE:SPECIFIED_TRC	N	Punch

Exception Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 140	If a time reporter reports hours > 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. Use this template to warn a manager when time reporters are reporting an excessive number of hours. The results for multiple jobs combine to Empl Rcd 0 for rule evaluation.	Y	Both
Template 150	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. Use this template 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

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 210	If a time reporter reports x minutes past scheduled start time, create an 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
Template 230	Create an 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
Template 240	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 ensures that time reporters report their clock time in correct punch type sequence. (For example, an IN punch must always follow an OUT punch, and so on.) You could use this rule in conjunction with Exception Template 250.	N	Punch
Template 250	Create an 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 ensures that a time reporter has no missing punches. For example, if time reporters never have more than 10 hours associated to an IN punch (because of meals, breaks, and so on), then create a rule that creates an exception when an IN punch > 10 hours.	N	Punch

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 280	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. Use this template to inform managers if time reporters are working too many hours without a break.	Y	Punch
Template 300	Average hours per week threshold. Weekly rolling period.	When a time reporter reports 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
Template 310	Average hours per week threshold. Daily rolling period.	When a time reporter reports 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 will have a Daily rolling period ID assigned. For example, first period is day one of week 1 through day seven of week 10; second period is day two of week 1 through day one of week 11 and so on.	Y	Both

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 320	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
Template 330	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
Template 340	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
Template 350	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

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 400	Minors may not work hours > 18 in a week or hours > three 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 . Use this FLSA rule for minors when school is in and out of session. The period for the rule is defined in the template header. When using this template, it is recommended that an In Session rule and an Out of Session rule are created and added to the rule program to provide the system with the school in session dates required to properly evaluate minors' reported time. **Note.** Update this rule annually for traditional schools and possibly quarterly for year-round schools.	N	Both
Template 430	If a time reporter reports vacation time on a day that is in a future period, create an 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

*When an OUT punch is missing for a day, the system does not know if the current shift should extend into the next day or end on the current day. As a result, the following work day cannot be processed correctly in Time Administration, as it does not know how to process the following day. It can look as if there is an improper order of punches (IN from the last work day, and an IN on the current work day, without an OUT, BREAK or MEAL punch in the middle.) Use Exception Rule Template 250 to trigger an exception when a particular punch type exceeds a certain number of hours, such as an IN punch. Use Exception Rule Template 240 to trigger an exception for an invalid order of punch types. Alternatively, you can create a custom rule to insert an OUT punch for a day in Reported Time, if one is missing, after "x" hours has passed.

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Guaranteed Hours Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 030	If a time reporter reports hours on a 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. Use this template for Guaranteed Hours rules.	Y	Both
Template 031	If a time reporter reports a specific number 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. You can use this template 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 that is greater than one day for the rule.

Note. For all "create" holiday rules, the system will create holiday pay in addition to reported or scheduled time. For all "replace" construct holiday rules, only scheduled time will be replaced with holiday pay. Any reported time will not be replaced with holiday pay.

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 060	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. Use this template to pay holiday pay to all time reporters.	N	Both
Template 070	Pay HOL for a holiday only if a time reporter worked the day before and the day after the 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. Use this template to pay holiday pay to all time reporters based on their attendance around the holiday.	N	Both
Template 071	Pay HOL for a holiday only if a time reporter worked the day before AND the day after the holiday. (Create or replace.) **Note.** For all "create" holiday rules, the system will create holiday pay in addition to reported or scheduled time. For all "replace" construct holiday rules, only scheduled time will be replaced with holiday pay. Any reported time will not be replaced with holiday pay.	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. Use this template to pay holiday pay to all time reporters based on their attendance around the holiday.	N	Both

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 080	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 . Use this template to pay a premium for hours worked to all time reporters who work on a holiday.	N	Both
Template 420	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
Template 160	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 is 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. Use this template for automatic meal deductions. If two automeal deduct rules are created for one rule program, only one applies.	Y	Punch

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Miscellaneous Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 530	Remove (1)SPECIFIED_TRC TRC from Rules working table (TL_IPT1) to ensure the TRC is not included in Payable Time. On the Template Header page, the default setting for the Time Period ID field is "NONE." *WARNING!* Any TRC used in this template is not included in Payable Time and is not sent to a payroll system. This rule template is often used to clean up Accumulators that are loaded into TL_IPT1. This template is not available for online rules.	Remove (1)SPECIFIED_TRC TRC.	N	Not applicable
Template 560	Performs calculations (add, subtract, multiply, or divide) between a TRC and a specified value. On the Template Header page, the default setting for the Time Period ID field is "NONE." This template is not available for online rules.	Update the quantity associated with TRC (1)SPECIFIED_TRC to be equal to TRC (1)SPECIFIED_TRC (2)SPECIFIED_CALCULATION (3)SPECIFIED_VALUE.	N	Not applicable

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Missing Punch Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 260	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
Template 270	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
Template 020	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
Template 021	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

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Premium Zone Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 100	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 only for those hours worked within the specified time, to be charged to TRC (3)SPECIFIED_TRC.	N	Punch
Template 090	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 period, this rule creates a TRC for all hours worked, even when the time reporter punches out after the specified time period.	N	Punch

Schedule Deviation Templates

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 050	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. Use this template to pay a premium to employees for working outside of their regular work week.	N	Both

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Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 290	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 are assigned to TRC (2)SPECIFIED_TRC. The time reporter must also work at least the scheduled number of hours 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 (with respective SetID).	N	Punch

Shift Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 190	Create premium if a time reporter works specified shift.	When a time reporter is scheduled to work in one of these shifts (1)SPECIFIED_SHIFTS (with respective SetID), create a shift premium of (2)SPECIFIED_AMOUNT for each full hour worked with TRC (3)SPECIFIED_TRC.	N	Both

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Specific Day Template

Name	Description or Example	Rule	Combine Data?	Punch, Elapsed or Both
Template 040	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
Template 170	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 Use this template to change how time is charged when reporting a specific TRC.	N	Both

See Also

Chapter 12, “Creating Rules in Time Administration,” Adding Rules to a Rule Program, page 311

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Pages Used to Create Rules from A Template

Page Name	Object Name	Navigation	Usage
Template Header	TL_TEMPLATE_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Template-Built Rules, Template Header	Define or view general information for a rule.
Approval Required	TL_TEMPLATE180_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Template-Built Rules, Approval Required	Define or view what the rule does (the condition and the action). **Note.** The page name and the object name have the suffix XXX, where XXX represents the number of the template. For example TL_TEMPLATE190_PNL. The page name is dynamic and will change depending on the template accessed.

Creating Rules from A Template

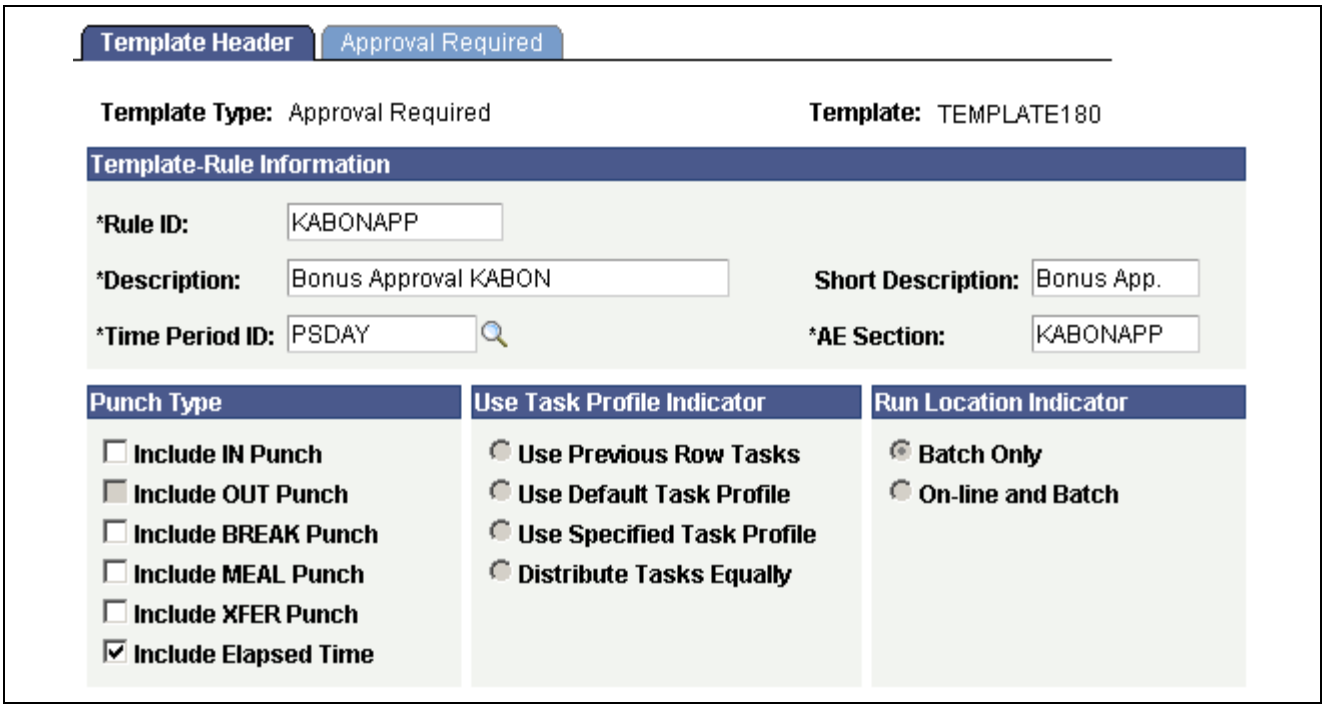
This section discusses how to:

1. Define and view general information for a rule.
2. Define the condition and action for the rule.

Defining and Viewing General Information for A Rule

Access the Template Header page.

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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 determines 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. Ensure 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

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 Apply this rule to In punches.

Include OUT Punch Apply this rule to Out punches.

Include BREAK Punch Apply this rule to Break punches.

Include MEAL Punch Apply this rule to Meal punches.

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Include XFER Punch Apply this rule to Xfer punches.

Include Elapsed Time Apply this rule to Elapsed Time.

Use Task Profile Indicator

When defining a rule that creates 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 *creates* data. It states: "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 *replaces* data. It states: "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 following reported times to illustrate how each option in this region works. Assume we're creating an overtime rule that states if a person reports more than 40 hours in a week, create all hours over 40 with the TRC named OT. (The shaded row in this 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 this example, the time reporter crosses the 40–hour boundary on Friday, so the system creates four hours as OT. The task data that it associates with the four 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 four hours of OT are 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.

For example, suppose that the default task profile states that time should be reported to department C. In this case, the four hours of OT are associated with department C.

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Use Specified Task Profile If 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.

For example, suppose that we select a task profile that states that time should be reported to department A. In this case, the four hours of OT are 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, and 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.

For 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 percent of the four OT hours (or 2.40 hours) to task profile A and 40 percent of the four 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 activate 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

Chapter 4, “Setting Up Basic Tables,” Understanding Time and Labor Implementation, page 15

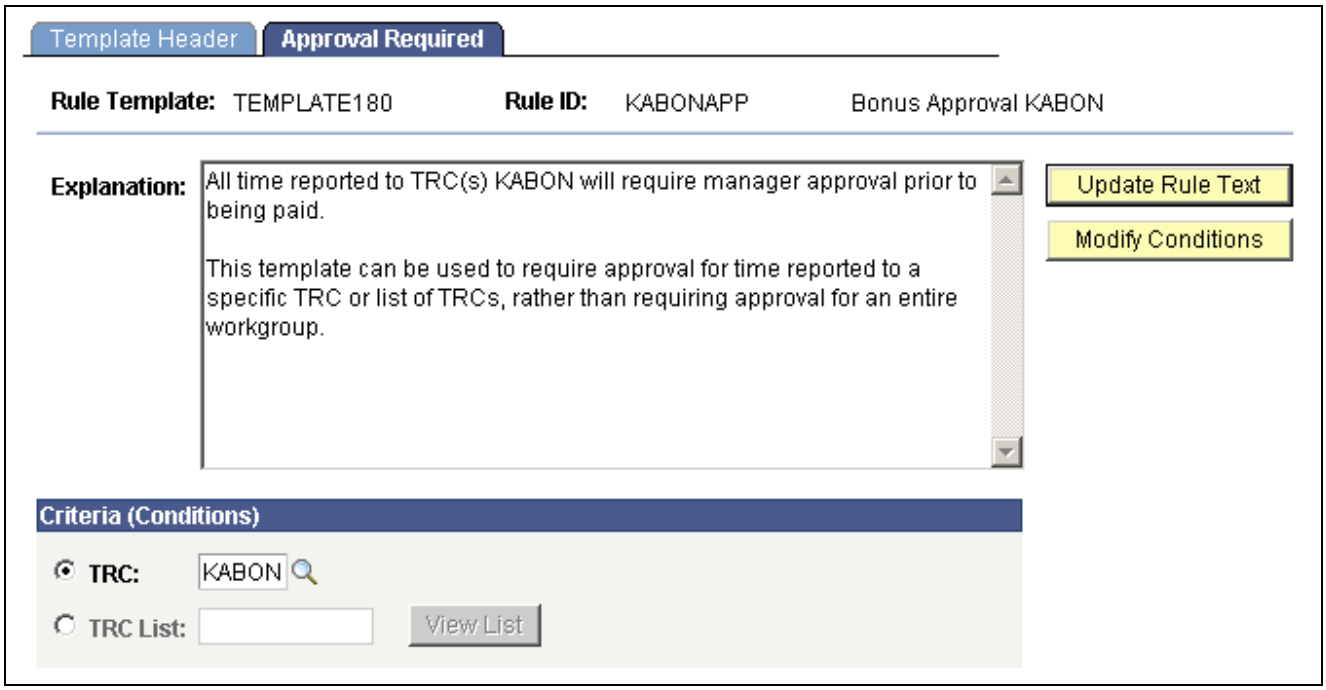
Chapter 12, “Creating Rules in Time Administration,” Adding Rules to a Rule Program, page 311

Chapter 7, “Defining Task Reporting Requirements,” page 123

Defining and Viewing Template Rule Conditions and Actions

Access the Approval Required page.

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Approval Required page

Explanation Describes the action of the rule when you run the Time Administration process. The description includes both a condition and an action.

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 for SQL users.

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 (known as the *Where* clause in SQL), often begins with *if* or *when.* For example, the conditional clause shown 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. Use this template to compensate employees reporting elapsed time for perfect attendance.

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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 possible fields are listed alphabetically and described:

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 more than 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.

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.

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.

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Premium Zone Start Enter an end time.

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. After 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. After 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.

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. After 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 shown 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 possible fields are listed alphabetically and described:

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.

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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.
Overtime TRC	Select the TRC for overtime.
Quantity	Enter the number of hours or units.
Rate	Enter a monetary amount.
Shift List	Select the appropriate shift list. After 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.

Creating Rules with Actions and Conditions

To define create rules with actions and conditions, use the Actions and Conditions (TL_ACTION and TL_CONDITIONS) components.

When you define actions and conditions in Time and Labor, you define them independently of one another, which enables you to reuse the same actions or conditions in more than one rule without having to define them again. Using actions and conditions does not require a mastery of SQL.

This section discusses how to:

1. Define general information for a SQL action.
2. Create the text of a SQL action.
3. Copy an action.
4. Define general information for a SQL condition.
5. Create the text of a SQL condition.
6. Copy a condition.

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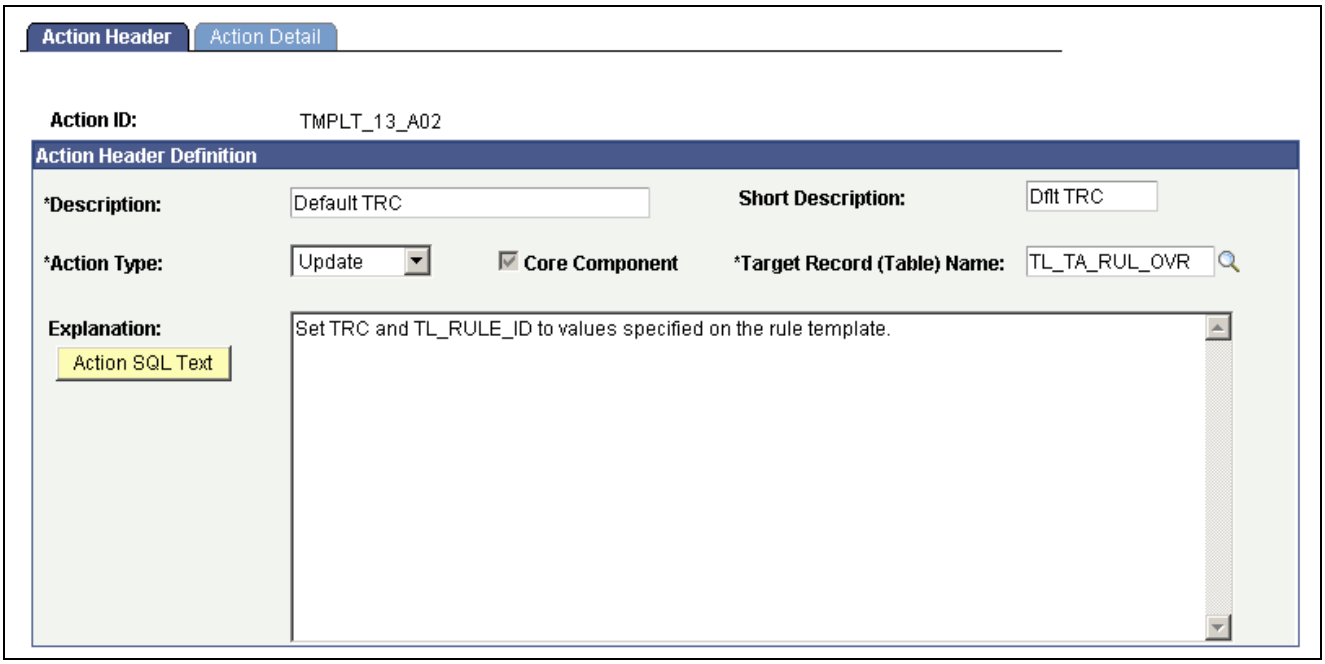
Pages Used to Create Rules with Actions and Conditions

Page Name	Object Name	Navigation	Usage
Action Header	TL_ACTION_PNL1	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Actions, Action Header	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	TL_ACTION_PNL2	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Action Detail, Action Detail	Create the text of your SQL action.
Copy Actions	TL_TA_ACTN_CPY_CTL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Copy Actions, Copy Actions	Copy an action.
Define Condition Header	TL_CONDITION1_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Conditions, Define Condition Header	Define or view general information for a SQL condition.
Define Condition Detail	TL_CONDITION2_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Conditions, Define Condition Detail	Create the text of a SQL condition.
Copy Conditions	TL_TA_COND_CPY_CTL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Copy Conditions, Copy Conditions	Copy a condition.

Defining and Viewing General Action Information

Access the Action Header page.

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Action Header page

Some fields on the Action Header page always appear; others appear only in connection with the action type of *Insert.* These 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. 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.
- *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. If the action type is *Insert,* further define the data to be inserted 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 Time and Labor application. These objects are used in templates. If the object you are viewing was created by the PeopleSoft system, this check box is selected; if you created this object, this check box is cleared. 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.

These fields appear only if you select an action type of *Insert:*

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Source Record (Table) Name The source record (table) from which you are taking data to perform the insert.

Insert Source Indicator The field that enables you to specify the exact source of the data used to perform the *Insert.* Valid values are:

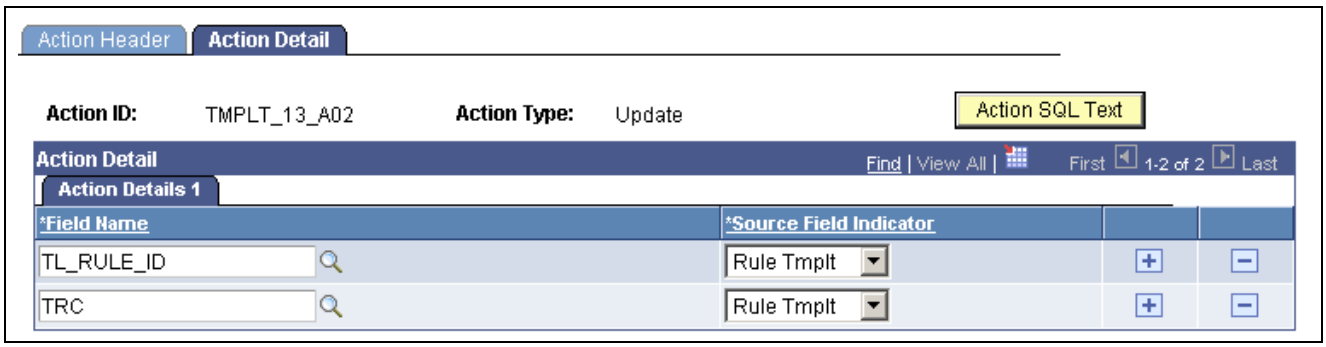
From Another Table: If you select this value, the Source Record (Table) Name field is available. Enter the source record from which you are taking data to perform the insert. Go to the Action Details pages to specify the source of the data to enter into the Target Record (Table) fields.

From a List of Values: If you select this value, the Source Record (Table) Name field is unavailable. 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

Access the Action Detail page.



Action Detail page

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, answer these questions: what fields are you updating or inserting data into and what are the sources (and types) of data that you are using to perform the insert or update?

The specific information to enter depends on the type of action specified on the Action Header page and the value entered in the Insert Source Indicator field.

Enter the action details on 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.

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.

Field Name

- If the action type is *Update,* use this field to identify the 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.
- If the 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 fields for which you are creating a new

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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.

You can override the default and select one of these options:

Expression

Meta-SQL

RuleTmplt

State Var

Note. *RecField* is not available when you insert from a list of values.

- If the 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 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 the insert in the SRC (source) FieldName column of the Action Details 2 page. You can override the default and select one of these options:

  Constant

  Expression

  Meta-SQL

  State Var

Source Field Indicator

- If the 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 the source field indicator is *Constant,* the Constant field on the Action Detail 2 page is available. Enter the constants to insert in the Target Record (Table) fields.
  - *Expression Text:* If the source field indicator is *Expression,* the Expression Text field on the Action Detail 2 page is 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 the source field indicator is *Meta-SQL,* the Meta-SQL field on the Action Detail 2 page is available. Enter the meta-SQL to use to update a field or a row of data in the target record (table).
  - *RecField:* If the source field indicator is *RecField,* the SRC Field Name field on the Action Detail 2 page is 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 use one of the Intermediate Payable Time tables as both the source and target of the update, you could set the ORIG_TRC to TRC in a rule that changes the TRC.

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- *State Variable:* If the source field indicator is *State Var,* the State Variable field on the Action Detail 2 page is available. Enter the state variable from any Time and Labor state record to use as the source of the update.

• If the action type is *Insert - From a List of Values:*

By default, if you insert 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. You can override the default and select one of these options:

- *Expression Text:* If the source field indicator is *Expression,* the Expression Text field on the Action Detail 2 page is 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 the source field indicator is *Meta SQL,* the Meta-SQL field on the Action Detail 2 page is available. Enter the meta-SQL to use as the source of the insert into the target record (table).
- *State Variable:* If the source field indicator is *State Var,* the State Variable field on the Action Detail 2 page is available. Enter the state variable from any Time and Labor state record to use as the source of the insert.

Note. *RecField* is not available when you insert from a list of values.

• If the action type is *Insert - From Another Table:*

By default, if you insert 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. You can override the default and select one of these options:

- *Constant:* If the source field indicator is *Constant,* the Constant field on the Action Detail 2 page is available. Enter the constants to insert in the Target Record (Table) fields.
- *Expression Text:* If the source field indicator is *Expression,* the Expression Text field on the Action Detail 2 page is available. Create an expression text. For example, this could be a subquery that generates data for the insert.
- *Meta-SQL:* If the source field indicator is *Meta-SQL,* the Meta-SQL field on the Action Detail 2 page is available. Enter the meta-SQL to insert data into the target record (table).
- *State Variable:* If the source field indicator is *State Var,* the State Variable field on the Action Detail 2 page is available. Enter the state variable from any Time and Labor state record to use as the source of the insert into the target record (table).

Action Detail

Field Name

This column contains the fields in the target record (table) that you are updating or performing the insert action on.

• If the action is *Update,* this column displays the same fields you entered in the Field Name column on the Action Detail 1 page. These fields belong to the target record (table) that you have chosen to update.

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- If the action is *Insert - From a List of Values,* this column displays the Target Record (Table) fields on which you are performing the insert.
- If the 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:

Constant

Displays if the source field indicator is *Constant.*

Enter the constant to use for the update or insert.



Displays if the source field indicator is *Expression*.

Click the button to access the Expression Text field.

Meta-SQL

Displays if the source field indicator is *Meta-SQL.*

Enter the meta-SQL to use for the insert or update action.



Displays if the source field indicator is *Meta-SQL.*

Click the button to set parameters within the meta-SQL.

SRC FieldName (source fieldname)

The system displays this field if the source field indicator is *Rec Field* (Record.Field) and the action type is *Update* or *Insert - From Another Record*.

- If the 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 the 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 on the Action Header page.

State Variable

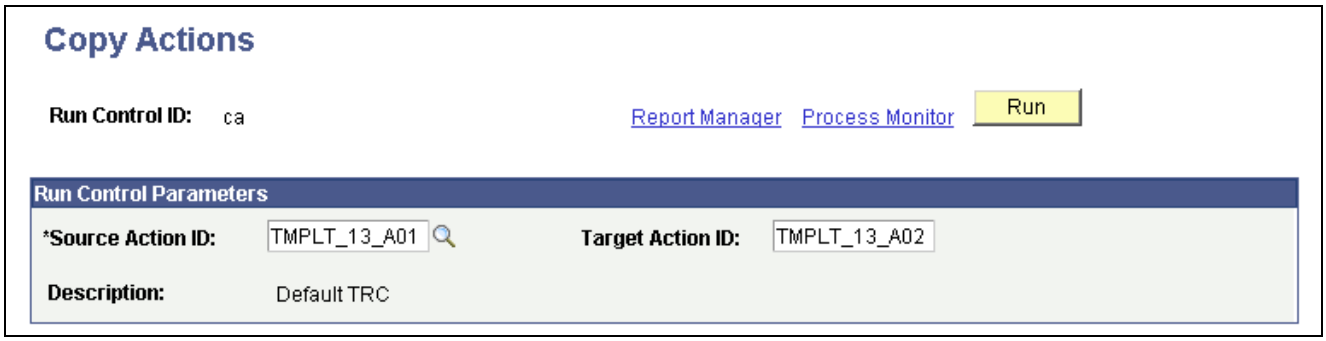
The system displays this field if the source field indicator is *State Var*(state variable).

Enter the state variable from any Time and Labor state record to use as the source of the update or insert.

Copying Actions

Access the Copy Action page.

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Copy Actions 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 after they are part of a rule and the system is in production (that is, after *Production Environment* is selected on the Installation Options page).

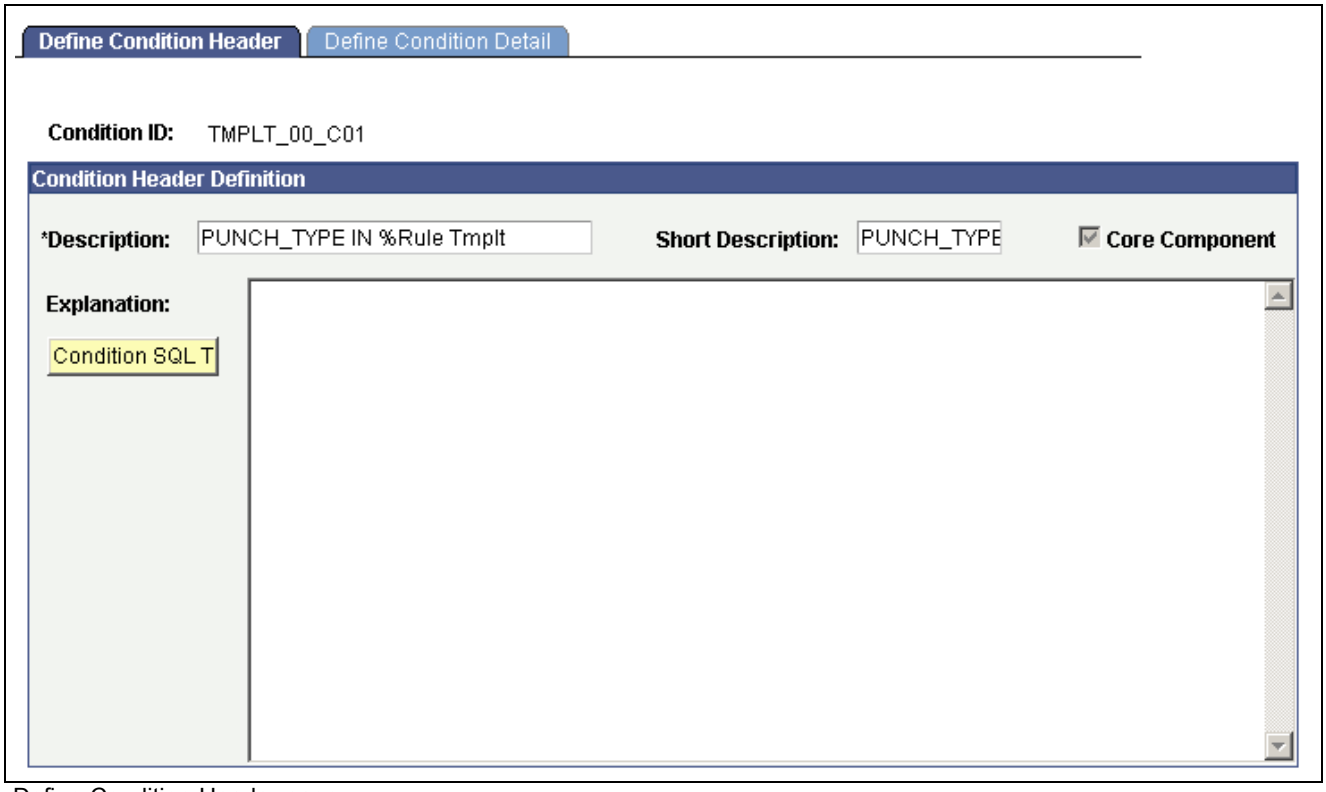
Source Action ID Select the action to copy. When you enter a value in this field, the system displays the appropriate Short Description for this action.

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

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Note. Template-built rules are not effective-dated; however, they are associated with an effective-dated rule program.

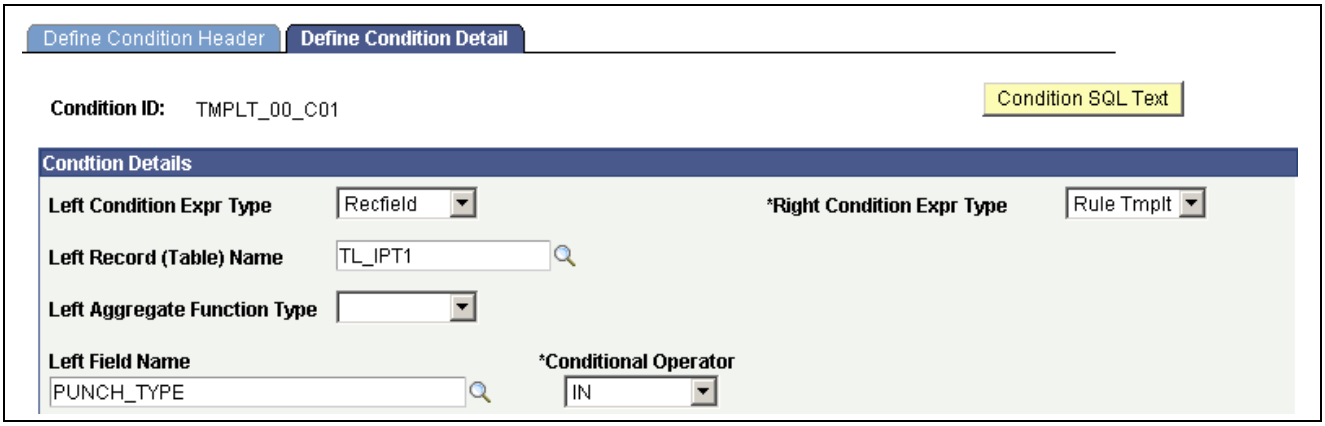
Core Component This field is display-only and system-maintained. Time and Labor delivers many SQL objects that are used in templates. If the object you are viewing was created by PeopleSoft, this check box is selected; if you created this object, this check box is cleared. You cannot modify or save this object, but you can copy it and modify the copy.

Explanation Use this expression text box to explain the condition you are defining.

Click 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 elements before an action occurs. The action occurs only if the defined relationship is true. For example, you can specify that an action occurs only if a field equals a certain value or you can specify that an action occurs only if a field value is greater than another defined value. You specify the kinds of elements to compare (for example, a field value to a constant) in the Left Condition Expr Type (left condition expression type) and Right Condition Expr Type (right condition expression type) fields. You 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. These fields always appear:

Left Condition Expr Type (left condition expression type) 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, Rule Tmplt* and *State Var* (state variable).

Right Condition Expr Type (right condition expression type) 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, Rule Tmplt* and *State Var* (state variable).

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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. Select one of these values:

< (less than)

<= (less than or equal to)

= (equal to)

> (greater than)

>= (greater than or equal to)

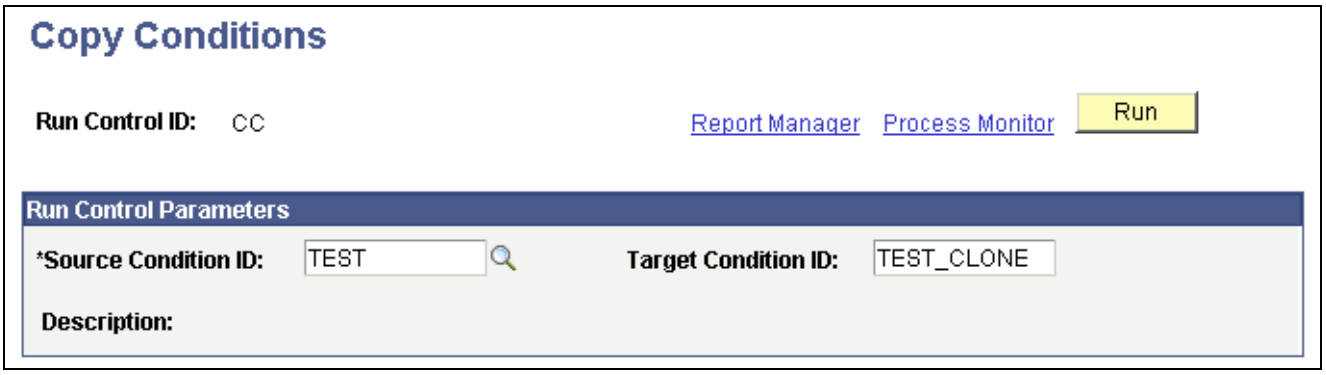
Depending on the values in the Left Condition Expr Type and Right Condition Expr Type fields, these additional fields appear:

Left or Right Expression Type	Additional Fields
Constant	The Left Constant or Right Constant field appears. Enter a constant to define the 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 any length.
Meta-SQL	The Left Meta-SQL or Right Meta-SQL field appears. Enter the appropriate meta-SQL to define the condition.
RecField	If the left or right condition expression type is *RecField,* these fields appear: • Left Record (Table) Name or Right Record (Table) Name. Enter the left or right record that you will use to define the 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 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 the condition.

Copying Conditions

Access the Copy Conditions page.

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Copy Conditions page

First, duplicate the condition. Second, rename and modify the condition. Then, combine the condition with other actions and conditions to form new rules.

Note. You cannot alter individual actions or conditions after they are part of a rule and the system is in production (that is, after *Production Environment* is selected on the Installation Options page).

Source Condition ID Select the condition to copy. When you enter a value in this field, the system displays the appropriate short description for this action.

Target Condition ID Enter a name for the new or duplicate condition.

After you copy the condition, use the Define Conditions component (in correction mode) to modify the copy.

Creating SQL Objects

To create SQL objects, use the SQL Objects (TL_SQL_OBJECT) component.

SQL objects are the most complex Time and Labor rule objects that PeopleSoft delivers. Use them to define rules that are more complicated than those 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 prefer to write free-form SQL statements, use an expression text box within the SQL object pages to enter and format the SQL statements. If you do not want to use free-form SQL statements, the SQL object pages provide guidance for each aspect of an action and condition.

If you create 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 the statement.

We use this example for 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
```

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```
, 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
```

Note. PeopleSoft 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 this component has eight pages, 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 when defining a SQL object:

- What type of SQL statement do I want to create?
- What is the driver table for the statement?
- What is the result table for the SQL Select statement?
- What do I want to name the resulting SQL statement?
- What other tables do I want to join to the driver table?
- For each table added, how do I want to join this table to the driver table?

  Do I want to do this later?
- What fields do I want to select?
- What fields on the driver table do I want to update?
- How do I want to determine the scope of the Where clause statement?

In the 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 provide this clause of the 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.

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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 this 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	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, SQL Object	Select the type of action and create descriptions of the SQL statement you are creating.

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Page Name	Object Name	Navigation	Usage
Expression Text	TL_SQL_EXPRESS_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Expression Text Expression must be entered in the *SQL Type field for the Expression Text tab to appear at the top of the page.	Enter free-form SQL text.
Insert Fields	TL_SQL_INSERT_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Insert Fields You must select Insert from the SQL Type field menu for the Insert Fields tab to appear.	Enter values in the record field of a table.
TL SQL Insert SecPNL	TL_SQL_INSMSQL_SEC	Click the Meta-SQL button on the Insert Fields page.	Enter meta-SQL parameters.
Expression Text Sec Panel	TL_SQL_OBJ_SECPNL4	Click the Expression Text button on the Insert Fields page.	Enter expression text.
Update Fields	TL_SQL_UPDATE	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Update Fields You must select Update from the SQL Type field menu for the Update Fields tab to appear.	Update a record field.
Tables	TL_SQL_OBJ_TABLES	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Tables You must select *Select* from the SQL Type field menu for the Tables tab to appear.	Designate which tables to use in this SQL object.
Tables - Expression Text	TL_EXPRESN_SEC	Click the Expression Text button on the Tables page.	Enter expression text for tables.
Automatic Joins	TL_SQL_JOINS_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Automatic Joins You must select *Select* from the SQL Type field menu for the Automatic Joins tab to appear.	Join tables.

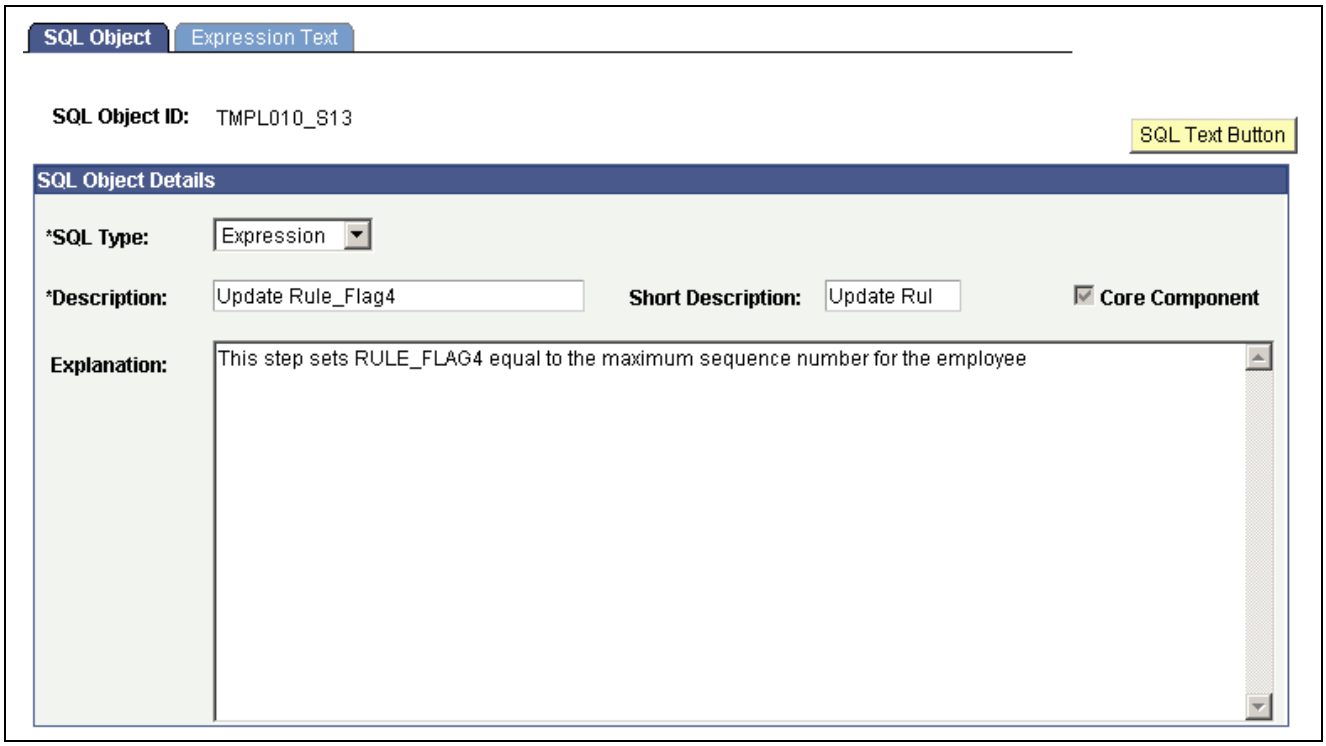
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Page Name	Object Name	Navigation	Usage
Select Fields	TL_SQL_SELECT_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Select Fields. You must select *Select* from the SQL Type field menu for the Select Fields tab to appear.	Create the first clause of a Select statement.
Select Tables - Expression Text	TL_SQL_EXPRESS_PNL	• Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Tables • Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Expression Text You must select Expression from the SQL Type field menu for the Expression Text tab to appear.	Enter expression text for the first clause of a Select statement.
Where Expressions	TL_SQL_WHERE_PNL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, SQL Objects, Where Expressions You must select *Delete*, *Select*, or *Update* from the SQL Type field menu for the Where Expressions tab to appear.	Create the Where clause of the SQL statement.
SQL Bind Mapping	TL_SQL_BINDS_PNL	Click the Left/Right Bind button on the Where Expressions page.	Enter expression text for the Where clause of a SQL statement.
Copy SQL Objects	TL_TA_COPY_CTL	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Copy SQL Objects, Copy SQL Objects	Copy a SQL object.

Selecting Action Types and Creating SQL Descriptions

Access the SQL Object page.

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SQL Object page

Note. SQL objects are not effective-dated, but they 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 create a Delete statement to clear a table, we recommend that you create a truncate action step on the Define Rule Steps page instead.

Expression: Use to enter 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 values 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 to be used in multiple locations within the AE program. Store the exception description in a state

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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 create as a subquery in another query.

A subquery must be bound to an outer query. Time and Labor does not limit the number of nested subqueries, but the 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. Choose the table against which the 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. Time and Labor delivers several SQL objects that are used in templates. If the PeopleSoft system 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. You cannot modify or save this object, but you can copy it and modify the copy.

Explanation Enter a detailed description of the SQL Object.

Click the links at the bottom of this page to access other pages within this component.

See Also

Chapter 12, "Creating Rules in Time Administration," Adding Rules to a Rule Program, page 311

Entering Free-Form SQL Text

Access the 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 the SQL statements through an interactive SQL tool.

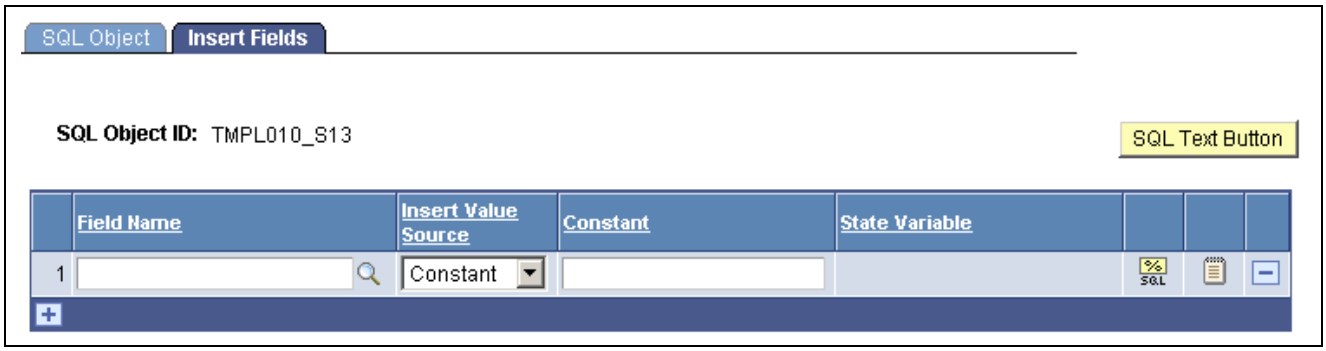
See Also

Chapter 12, "Creating Rules in Time Administration," Rule Step Creation Guidelines, page 231

Entering Values in the Record-Field of a Table

Access the Insert Fields page.

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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 is modified 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.

This icon is displayed for the Insert type of SQL statement. Click it to select a meta-SQL option. The TL SQL Insert SecPNL page is displayed.

This icon is displayed for the Expression type of SQL statement. Click it 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.

MetaSQL Select the meta-SQL variable to include in the 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 the meta-SQL variable. For example, if you selected the meta-SQL %DateDiff, enter the two dates for which the system should calculate the difference.

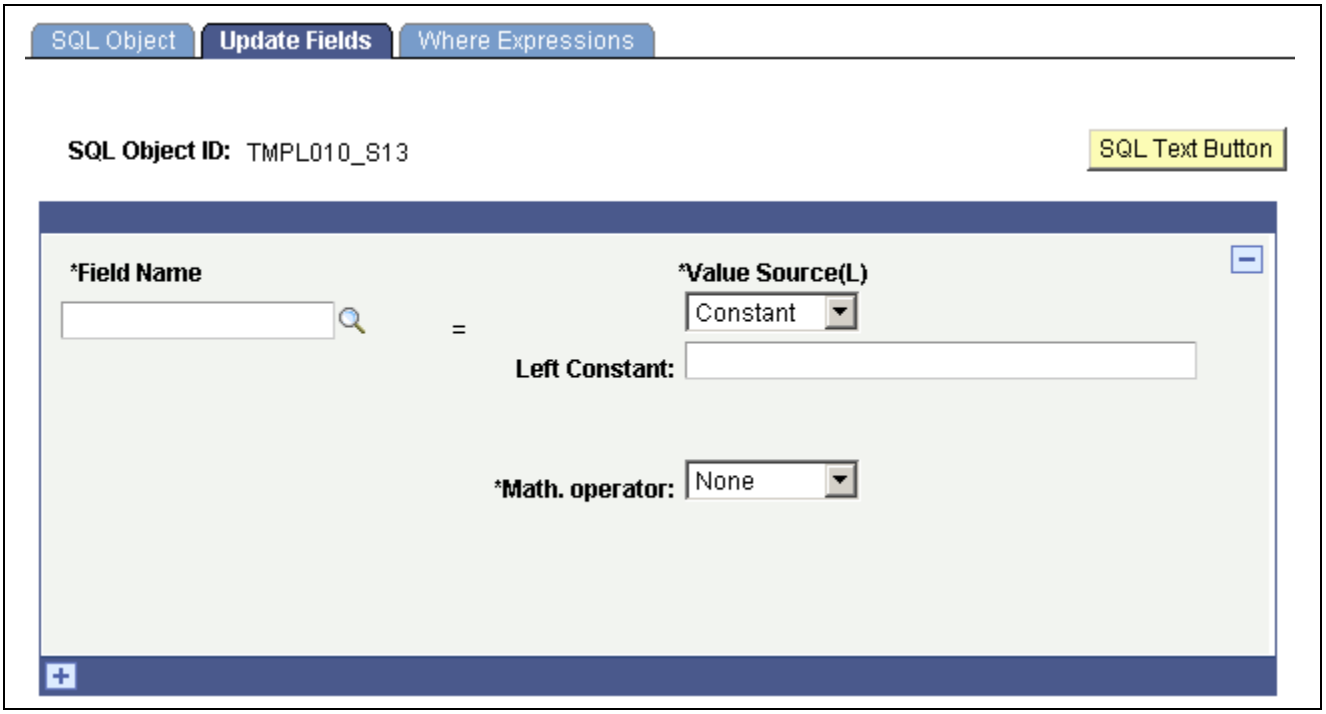
Updating A Record-Field

Access the Update Fields page. You can update a field with a constant, the result of a subquery, or an 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 -
```

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```
        (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 the subquery or math operation is 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 the calculation.

Math. Operator To perform a mathematical function, select the operator. If you do not want 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.*

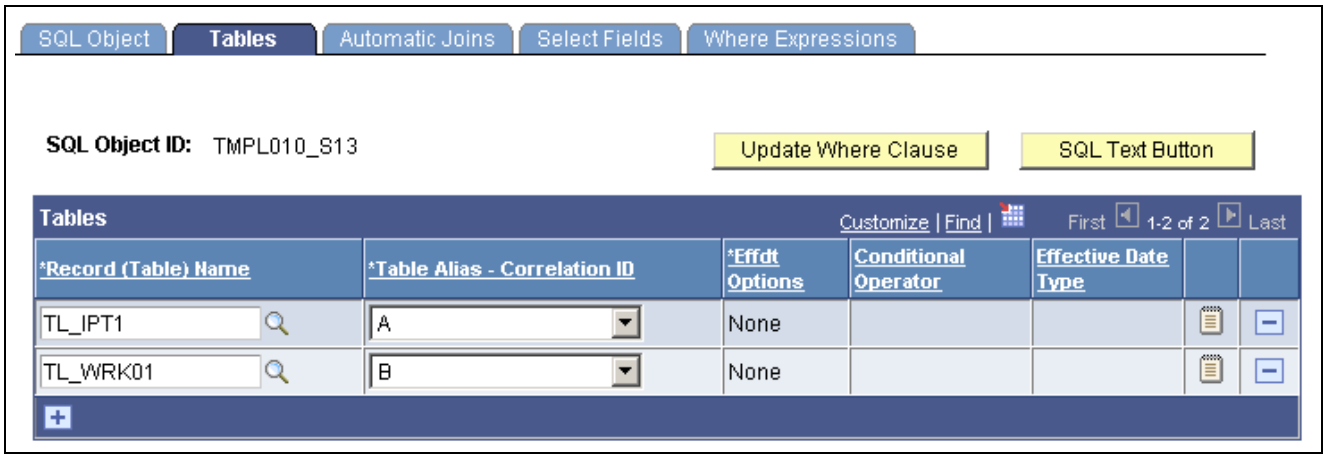
Right SQL Object ID This field is used to add a subquery to a Set clause.

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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 the 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. It is 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.

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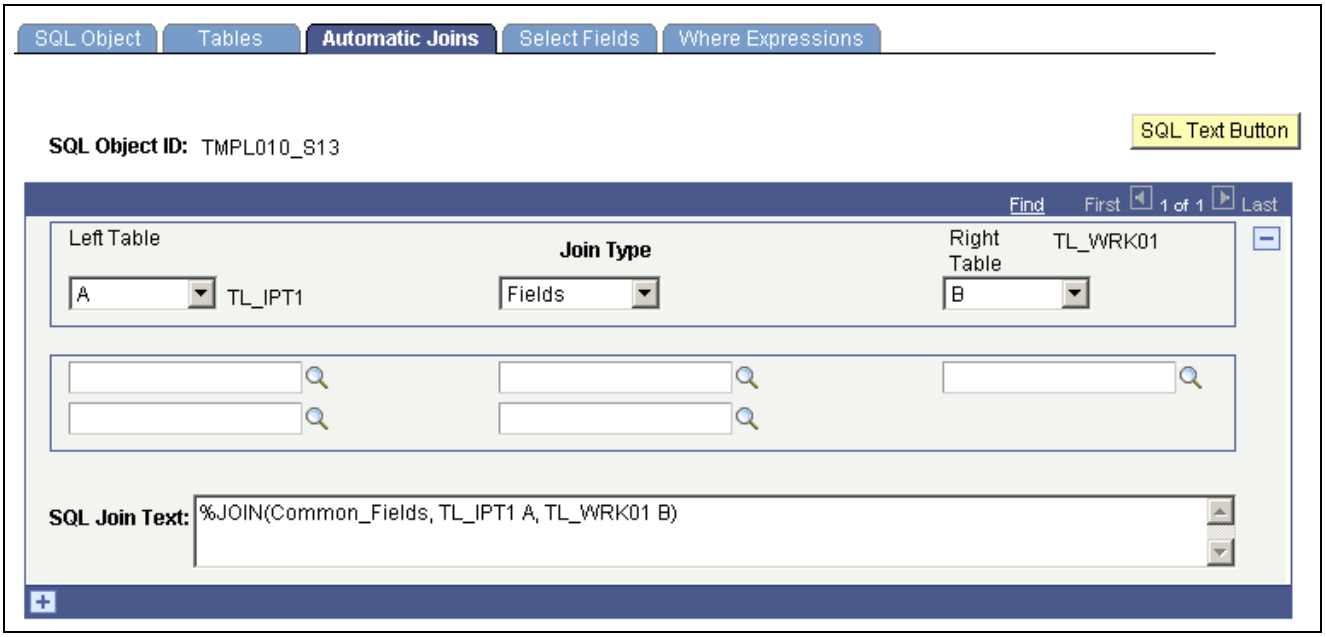


Click to enter expression text. The Expression Text Secondary page appears.

Click the links at the bottom of this page to access other pages within this component.

Joining Tables

Access the Automatic Joins page.



Automatic Joins page

You can only create inner joins in Time and Labor. You can join on any fields using custom-selecting or by selecting the key fields option. Because of 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 want to join the TL_IPT1 table to the TL_WRK01 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* and *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 the join. Valid options are: *(none), A, B, C, D, E, F, G, H, I, J.*

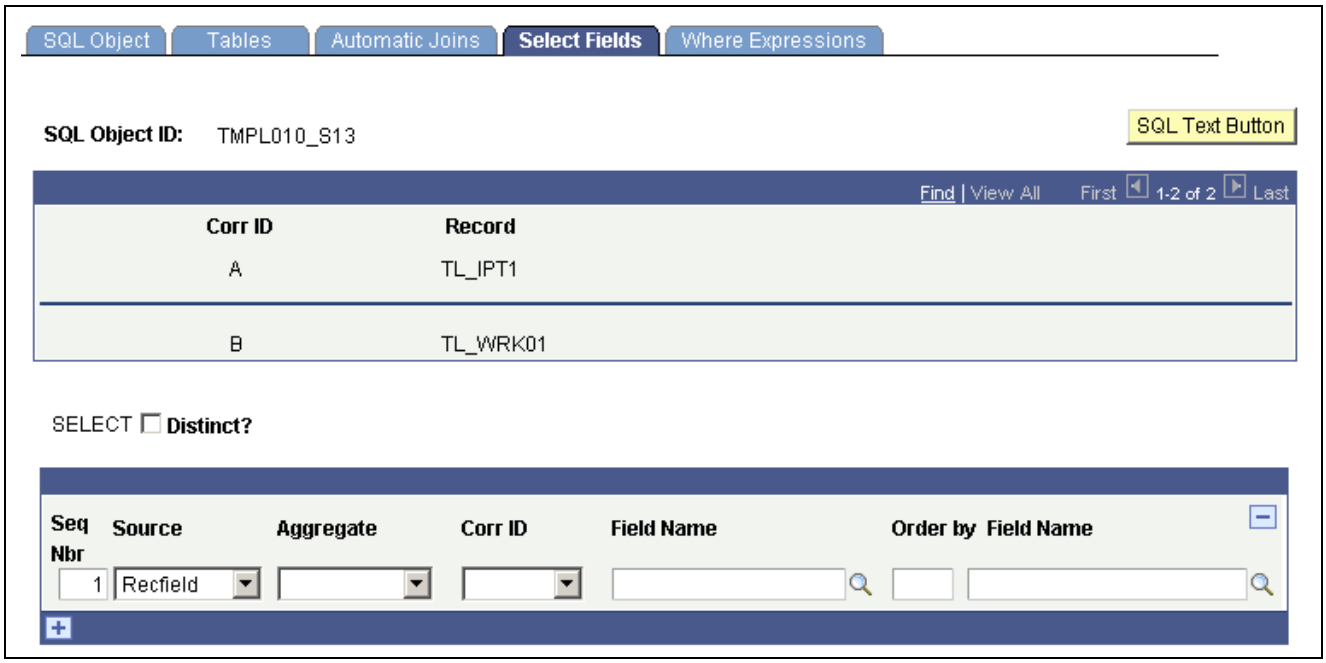
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SQL Join Text This field displays the text of the join. The system uses the meta-SQL construct %JOIN.

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 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 the 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 the Logical Operator/Where clause.

Record The system displays the record you selected for reference while creating the 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.

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Seq Nbr (sequence number) Enter a sequence number for this row. The system reorders 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,* and *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.

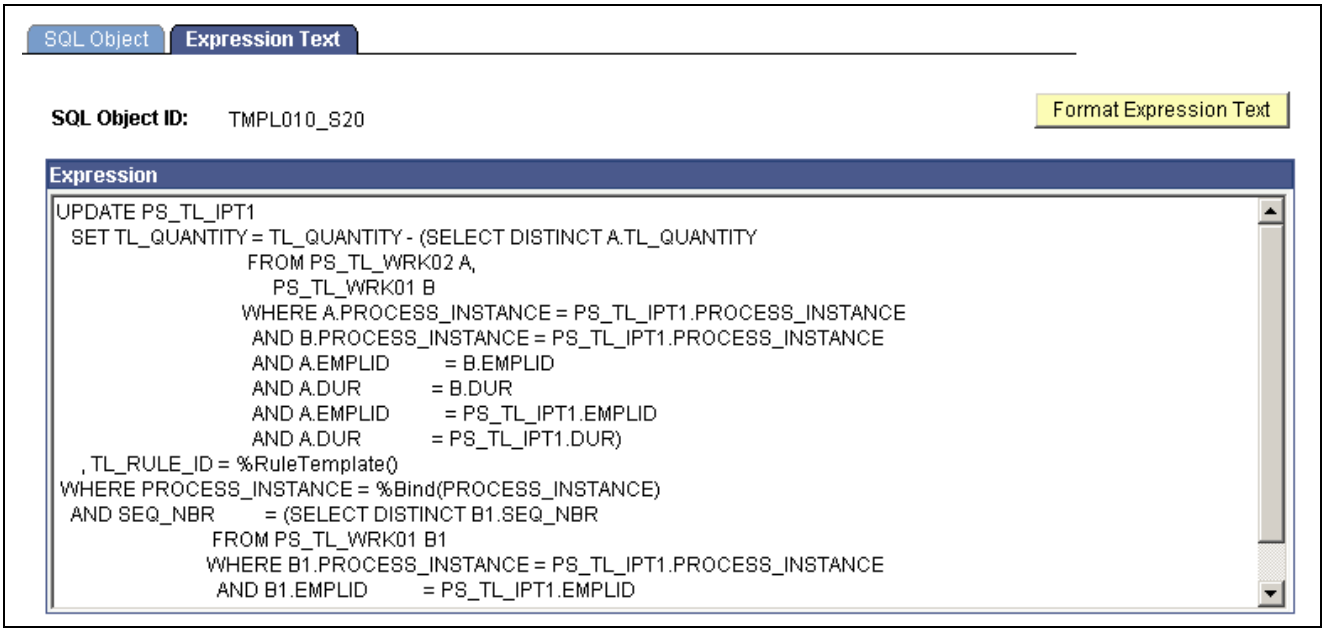
Field Name Select the column from which to select.

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.

Enter up to 254 characters in the expression text box.

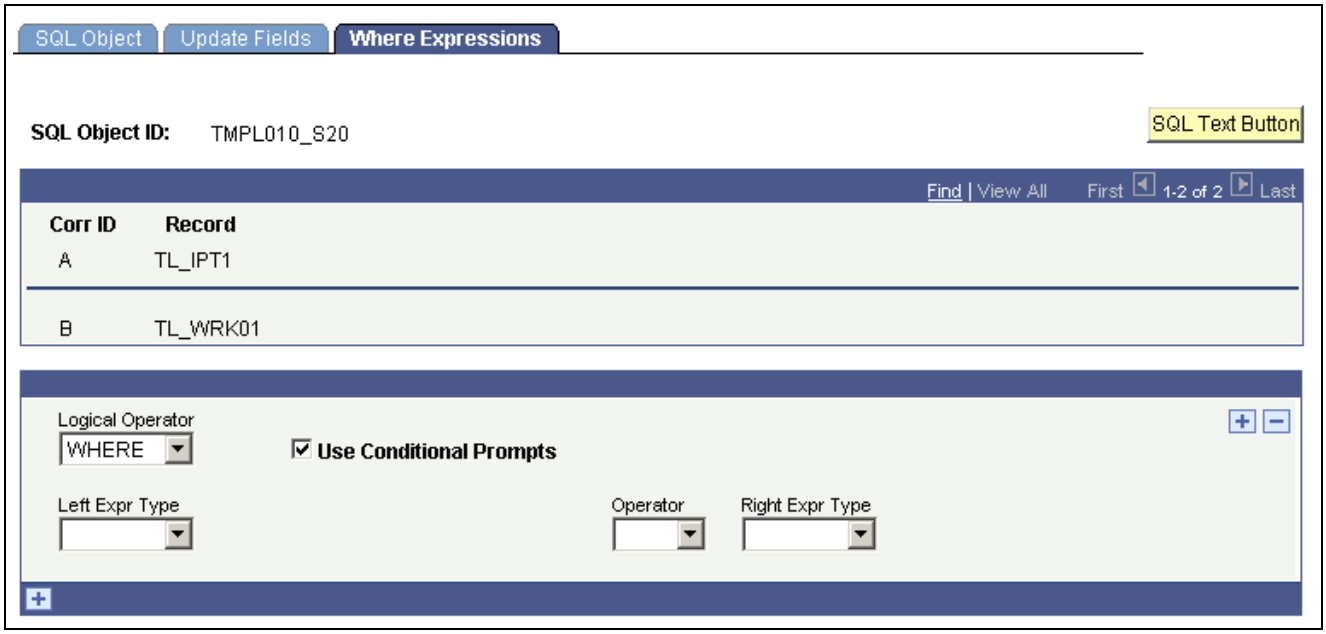


Expression Text page

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Creating the Where Clause of A SQL Statement

Access the Where Expressions page.



Where Expressions page

In the 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 selected for reference while creating the Logical Operator/Where clause.

Logical Operator Select an operator in this field. Valid values are: *(none), AND, HAVING, NONE, OR,* and *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,* and *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,* and *COUNT(*).*

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Operator	Enter an operator. Valid values are: *(none)*, <, <=, <>, =, >, >=, *EXISTS, IN, NOT EXIST,* and *NOT IN.*
Right Expr Type (expression type)	Enter a right expression type. Valid values are: *(none), Binding, Constant, Meta-SQL, Recfield, SubQuery, Template,* and *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 Agg Functions icon 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.

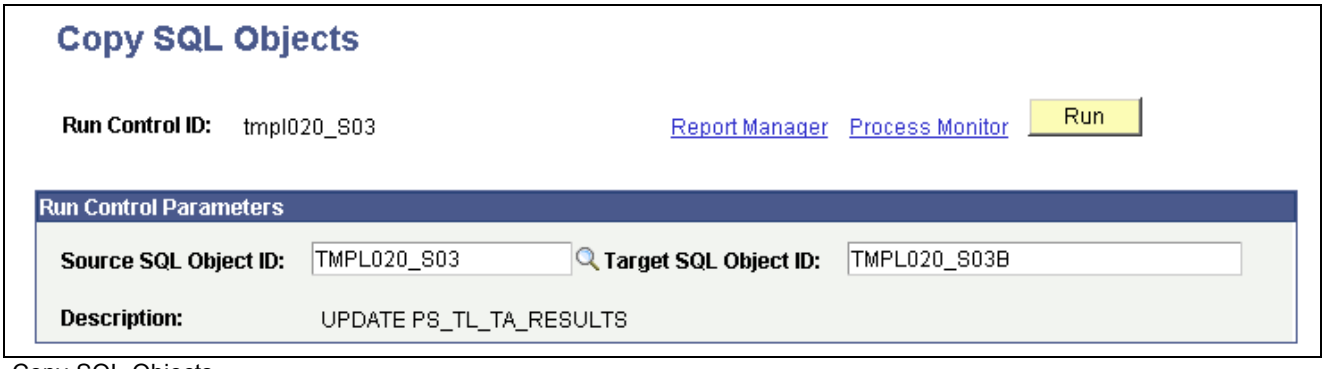
You must use the %Bind option in some situations. For example, to create a query that uses a subquery, you create the subquery first. As you create the subquery, you do not know in what table the field occurs (it could be an IPT table or another work record). Select the %Bind option. Once the subquery 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

Access the Copy SQL Object page.



Copy 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.

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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.

Source SQL Object ID Select the object to copy. When you enter a value in this field, the system displays the appropriate description for the 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 be modified according to the type of statement built.

Working with User Exits

User exits are an optional feature that can add PeopleCode and AE sections to regular 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.

Note. Have adequate Application Engine and PeopleCode training before creating AE sections.

See Also

Enterprise PeopleTools PeopleBook: Application Engine

Defining Attendance Programs

To define attendance programs, use the Attendance Programs (TL_ATTEND_PGM_PNLG) component.

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.

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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. After you set up the recommended actions, the system automatically monitors a time reporter's behavior according to 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 create custom actions.

Attendance tracking enables you to define the attendance characteristics and maintain those changes. When setting up, specify the 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 a custom action. If you choose to create custom actions, choose *Other* and enter comments that describe the action.

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

Understanding Tracking Methods

You can choose from three tracking method types: fixed period, rolling period, and step period. Each method is described in this table:

Tracking Method	Description
Fixed Period	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 the fixed period and is reset at the start of the next fixed period. For example, if you track attendance monthly, 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 previous tracking periods is differentiated by the IN_PERIOD flag.

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Tracking Method	Description
Rolling Period	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 July 12, 2000, then the system tracks attendance from April 16, 2000. It compiles all relevant attendance data to the present to determine if a time reporter's infractions require action. The next day, July 13, 2000, the system uses data from April 17, 2000, to the present date. It ignores attendance data for April 16, 2000, because this date is outside the period of interest.
Step Period	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 is currently being tracked for a 30-day period and violates the attendance rule, the tracking period is extended to 60 days from the date of the 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.

Understanding 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.
4. Viewing, by employee ID, the action thresholds that a time reporter has crossed.
5. Viewing a time reporter's violation history.

Note. You must link your attendance programs to rule programs, and then associate both to workgroups.

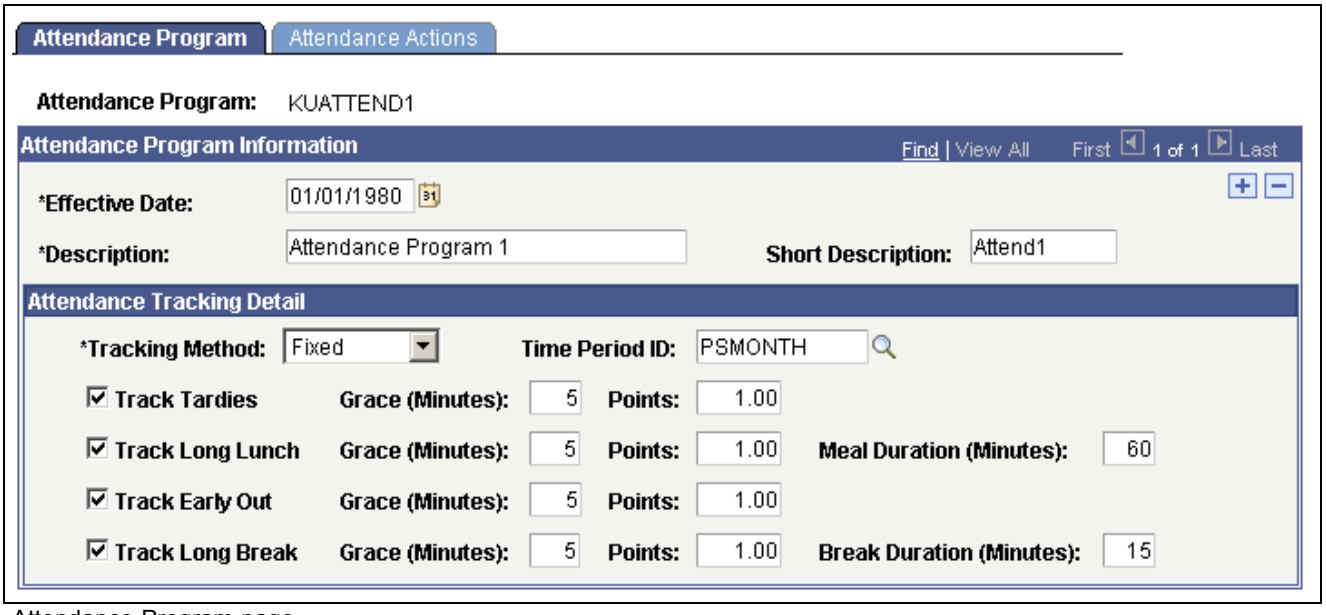
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Pages Used to Define Attendance Programs

Page Name	Object Name	Navigation	Usage
Attendance Program	TL_ATTEND_PGM_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Attendance Programs, Attendance Program	Specify infractions to track, grace periods to allow, and the severity of each infraction.
Attendance Actions	TL_ATTEND_ACT_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Attendance Programs, Attendance Actions	Specify which actions occur when infractions are committed and when these actions occur.
Review Attendance Actions	TL_ATTENDANCE_PNL	Time and Labor, View Exceptions and Attendance, Attendance Actions, Review Attendance Actions	View, by employee ID, the action thresholds that a time reporter has crossed.
Review Attendance History	TL_ATTEND_HIST_PNL	Time and Labor, View Exceptions and Attendance, Attendance History, Review Attendance History	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.

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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 is unavailable.

Time Period ID Select the time period ID that applies to the attendance program. You can select a period delivered by the PeopleSoft system or a custom period. 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 the 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.

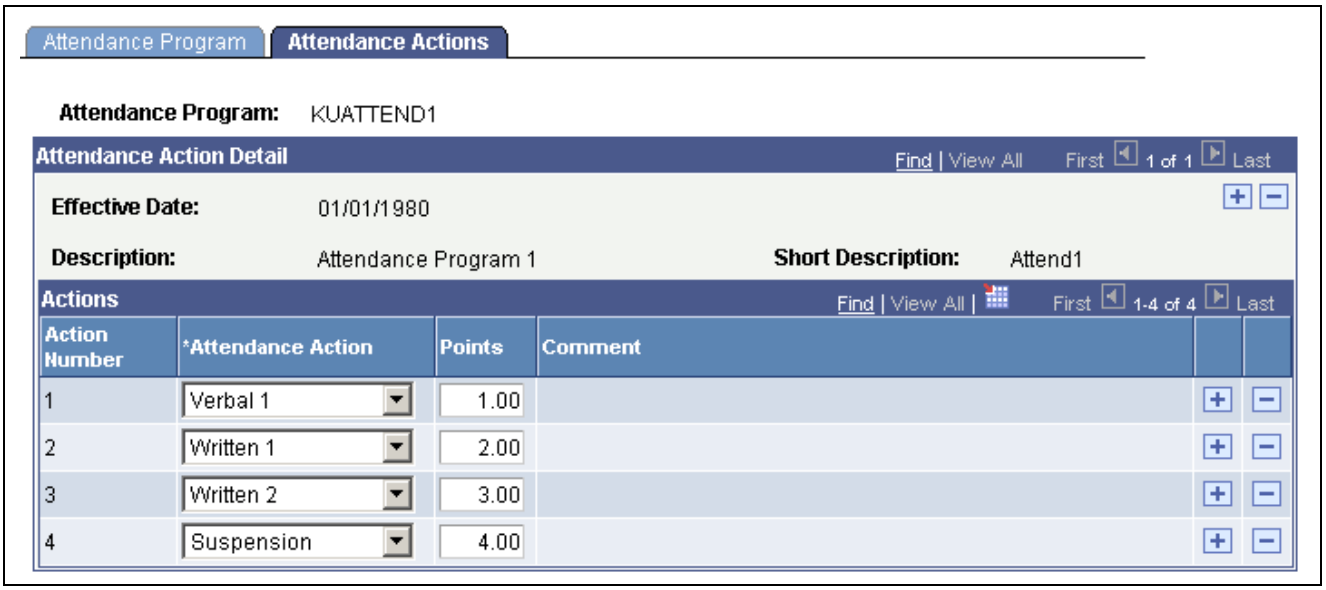
See Also

Chapter 4, “Setting Up Basic Tables,” page 15

Specifying Attendance Infraction Actions

Access the Attendance Actions page.

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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 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 data integrity. If you enter actions in the wrong sequence, the system does not reorder or re-prioritize 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 was 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 does 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. The 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 to prevent recommended actions from being skipped.

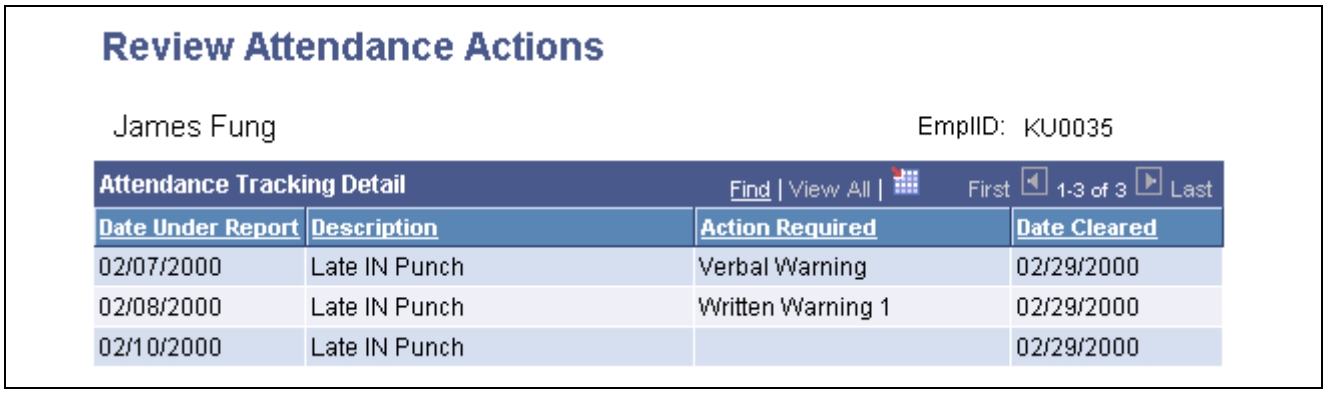
Comment

This 30-character, alphanumeric 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.

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Viewing Action Thresholds

Access the Review Attendance Actions page.



Review Attendance Actions

James Fung EmplID: KU0035

Attendance Tracking Detail Find | View All | First 1-3 of 3 Last

Date Under Report	Description	Action Required	Date Cleared
02/07/2000	Late IN Punch	Verbal Warning	02/29/2000
02/08/2000	Late IN Punch	Written Warning 1	02/29/2000
02/10/2000	Late IN Punch		02/29/2000

Review Attendance Actions page

Date Under Report The date that applies to this row of data.

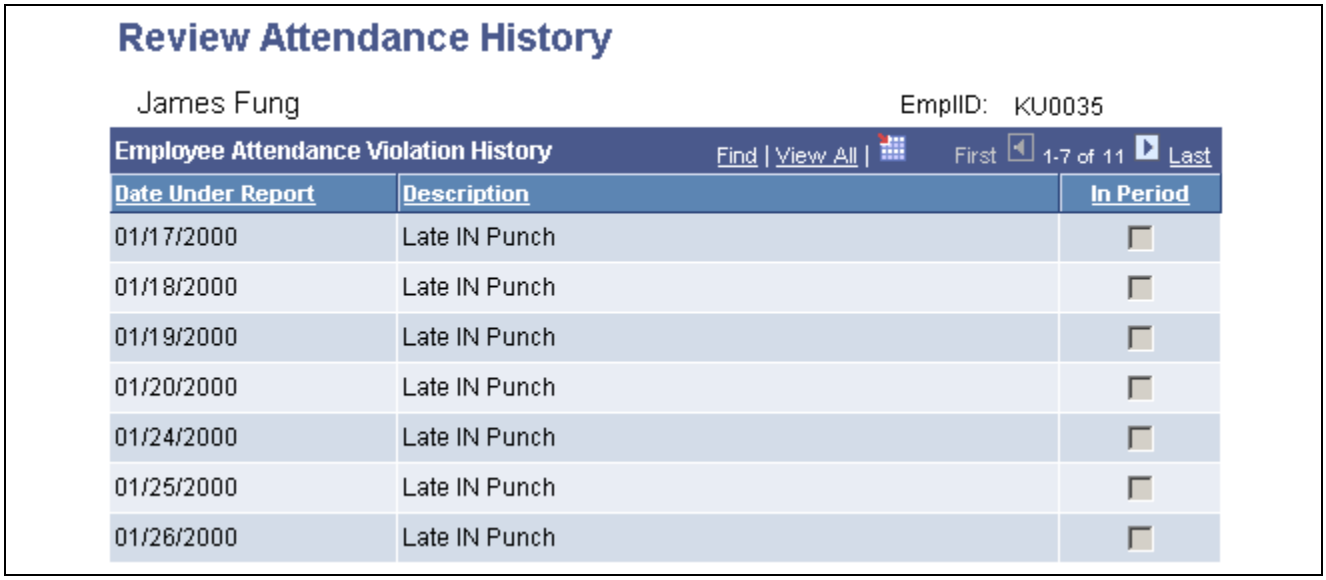
Description The system displays a description of the exception that occurred.

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 Review Attendance History page.



Review Attendance History

James Fung EmplID: KU0035

Employee Attendance Violation History Find | View All | First 1-7 of 11 Last

Date Under Report	Description	In Period
01/17/2000	Late IN Punch	☐
01/18/2000	Late IN Punch	☐
01/19/2000	Late IN Punch	☐
01/20/2000	Late IN Punch	☐
01/24/2000	Late IN Punch	☐
01/25/2000	Late IN Punch	☐
01/26/2000	Late IN Punch	☐

Review Attendance History page

Date Under Report This field displays the date that applies to this row of data.

Description The system 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).

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Assembling Rules

To assemble rules, use the Rules (TL_RULES) component.

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.

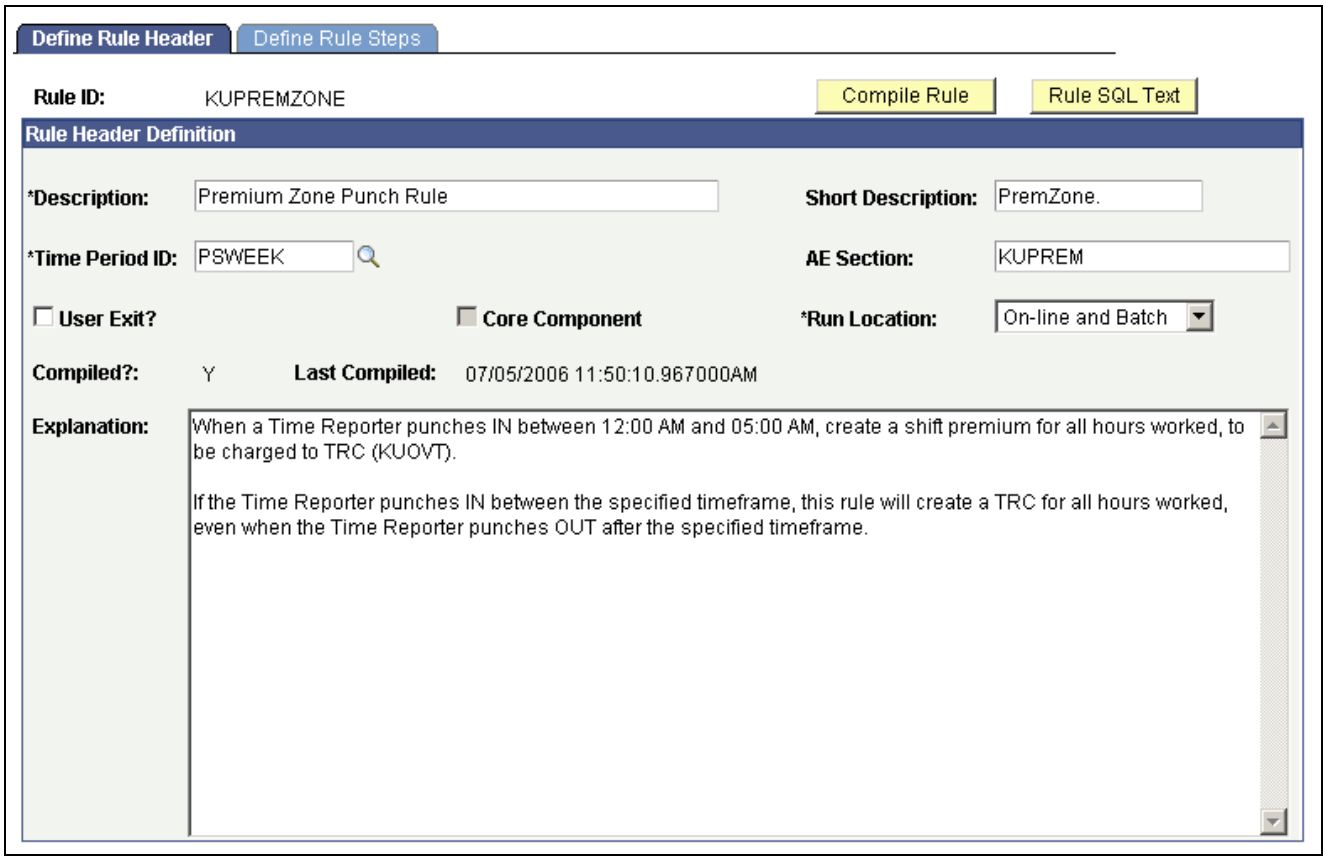
Pages Used to Assemble Rules

Page Name	Object Name	Navigation	Usage
Define Rule Header	TL_RULE_PNL1	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Rules, Define Rule Header	Enter basic information about a rule.
Define Rule Steps	TL_RULE_PNL2	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Rules, Define Rule Steps	• Define the steps of the rule. • Enter descriptions for each rule step.
Action SQL Text Resolution	TL_RULE_TEXT_SP	Click the Compile Rule button on the Define Rule Steps page.	View the SQL text of the rule step you are adding to a rule.
Copy Rules	TL_RULE_COPY	Set Up HRMS, System Administration, Utilities, Build Time and Labor Rules, Copy Rules, Copy Rules	Create a rule that is similar to an existing rule or a PeopleSoft-delivered rule object.

Entering Basic Information About a Rule

Access the Define Rule Header page.

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Define Rule Header page

Time Period ID Select the time period of interest that applies to this rule. Values include the values delivered by the PeopleSoft system and any time periods that you 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. Add the AE section name to the AE section list on the 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 Time and Labor objects in the AE library. Use the Time and Labor pages.

Compiled? The system populates this field automatically to signify whether the rule was compiled. Valid values are:

N (no): The rule has changed since the last compilation.

Y (yes): The rule was compiled and hasn't changed since that compilation.

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Last Compiled The system-maintained field that 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 Time and Labor. These rules are used in rule templates. If the rule you are viewing was created by the PeopleSoft system, then this field is set to *Y*. 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 activate 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 the rule. You can include examples of how this rule is used and how it affects data in different scenarios.

See Also

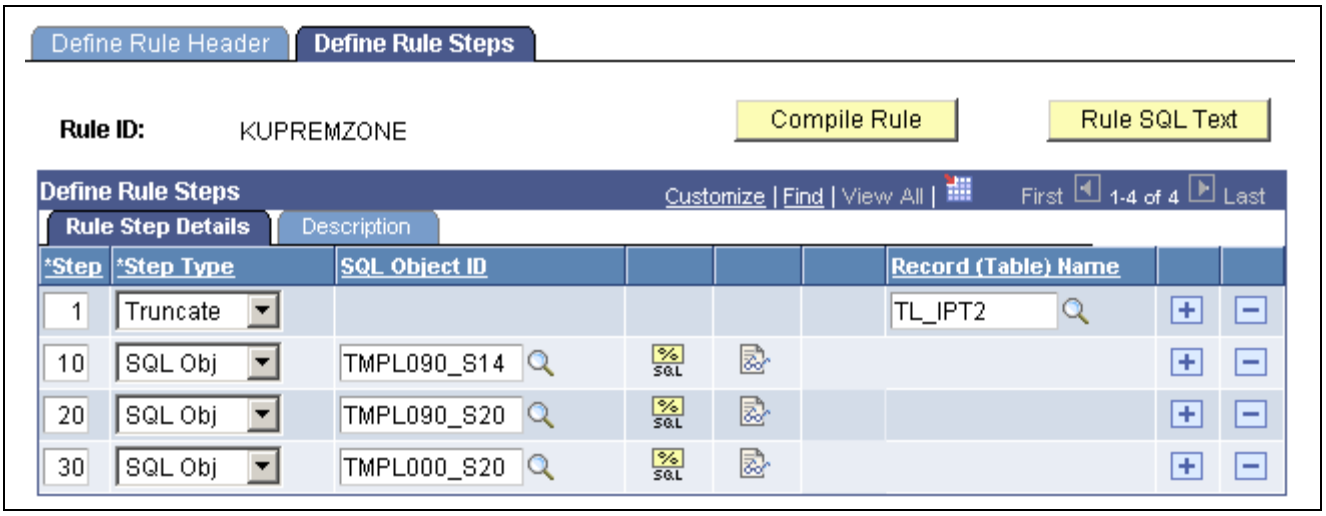
Chapter 13, "Understanding the Batch Process in Time Administration," page 315

Chapter 4, "Setting Up Basic Tables," Establishing Time Periods, page 43

Chapter 4, "Setting Up Basic Tables," Building and Viewing Time Period Calendars, page 53

Defining Rule Steps

Access the Define Rule Steps page.



Define Rule Steps page

Note. Multiple views of this page are available by selecting 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 the rule.

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Warning! Never truncate TL_IPT1. Doing so destroys the data.

Generally, order the rules by period. For example, if you have daily rules and weekly rules, the system should resolve the daily rules first.

Rule Step Details

Use this grid to enter the steps of the rule.

Step Enter a value in this column to determine the processing order of the 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 10 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 is unavailable.

Action: Select to add an action in this rule step. If you select this option, the Record (Table) Name column is 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 are 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.



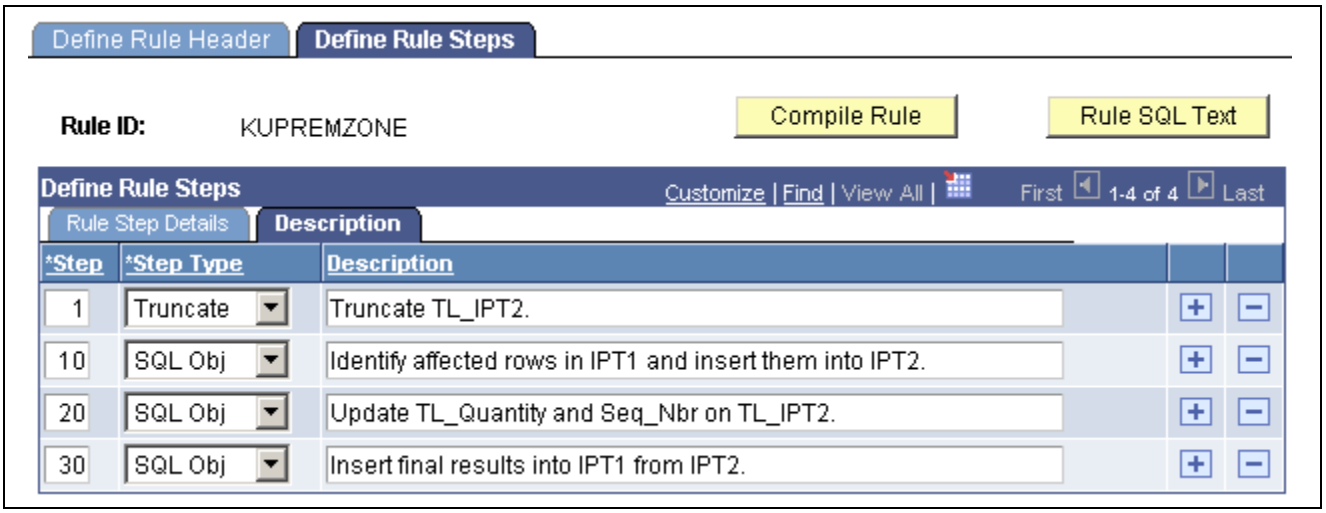
To view the SQL text of the object you are adding to the rule, click the Rule Text button to access the Action SQL Text Resolution secondary page. You will not see the SQL text of other objects in the step list. To view the entire rule text, click the button at the top of the page.

Record (Table) Name Select the table that you want to truncate, if applicable.

Description

Access the Description tab on the Define Ruile Steps page.

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Define Rules Steps – Description tab

Note. All of the fields in this page except this one were documented in the Define Rule Header: Rule Step Details page description:

Description Enter a short description of what this rule step should accomplish.

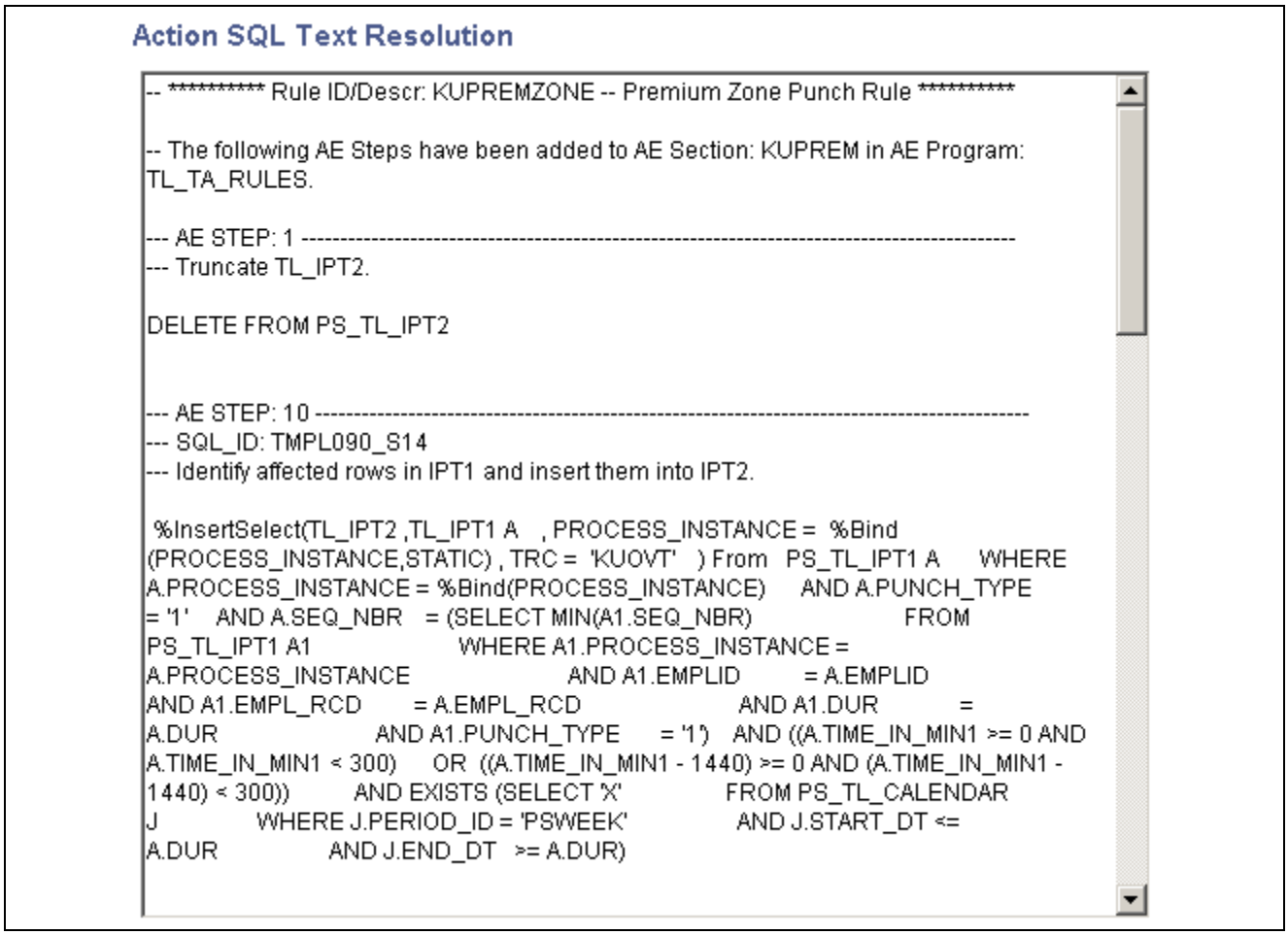
See Also

Chapter 12, "Creating Rules in Time Administration," Rule Step Creation Guidelines, page 231

Viewing the SQL Text of A Rule Step

Access the Rule SQL Text Resolution page.

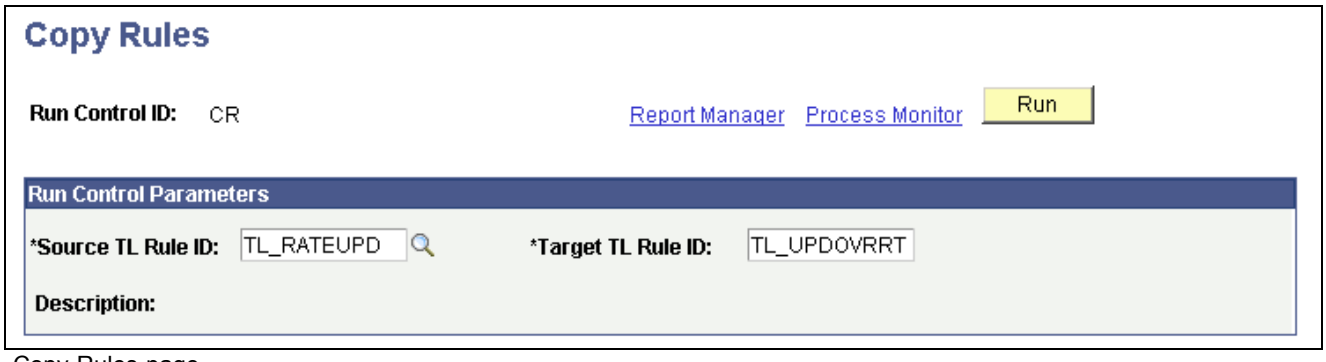
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Action SQL Text Resolution page

Copying Rules

Access the Copy Rules page.



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.

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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

To add rules to a program, use the Rule Programs (TL_RULE_PGM) component.

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.

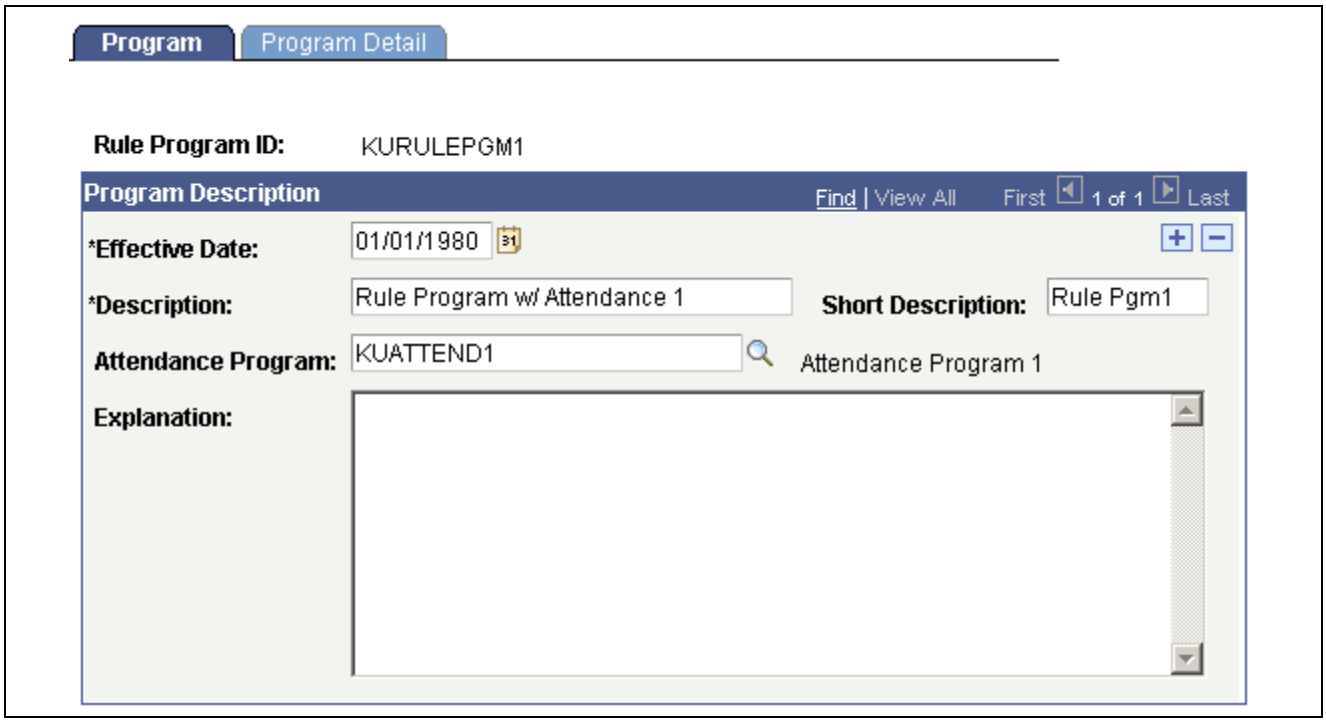
Pages Used to Add Rules to A Rule Program

Page Name	Object Name	Navigation	Usage
Program	TL_RULE_PGM_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Rule Programs, Program	Name and enter a description of the rule program. To link an attendance program to a rule program.
Program Detail	TL_RULE_PGMDTL_PNL	Set Up HRMS, Product Related, Time and Labor, Rules and Workgroups, Rule Programs, Program Detail	Select the rules to be included in the program and the order in which the Time Administration program is to execute them.

Assigning an Attendance Program to a Rule Program

Access the Program page.

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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.

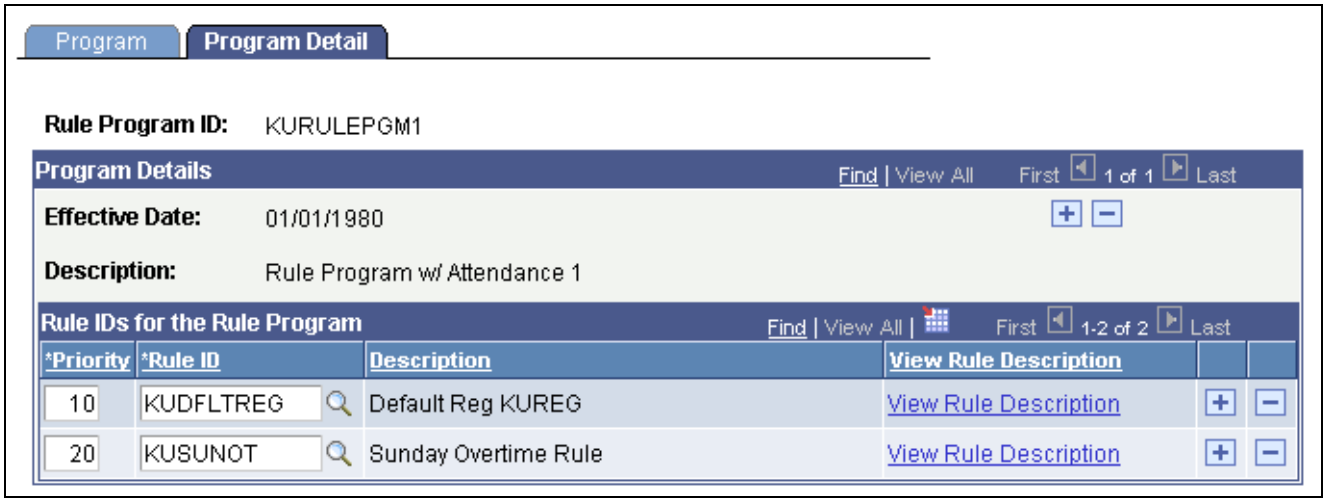
Description Enter a complete description of the rule program in this field.

See Also

Chapter 12, "Creating Rules in Time Administration," Defining Attendance Programs, page 298

Selecting Rules for a Program

Access the Program Detail page.



Program Detail page

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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 Time and Labor 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 10 or some other factor. If you do this, you will not need to renumber if you insert a row later.

The processing order is important because it directly affects 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.

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 is always 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 displays for reference.

View Rule Description

Click to see the full text description of the rule.

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CHAPTER 13

Understanding the Batch Process in Time Administration

This chapter provides an overview of the Time Administration batch process and discusses how to:

- View time reporter status.
- Start the Time Administration process.
- Generate and view runtime statistics.
- Use batch processing tips.

Understanding the 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 programs that make up the batch process are listed in the following table in the order in which they are run:

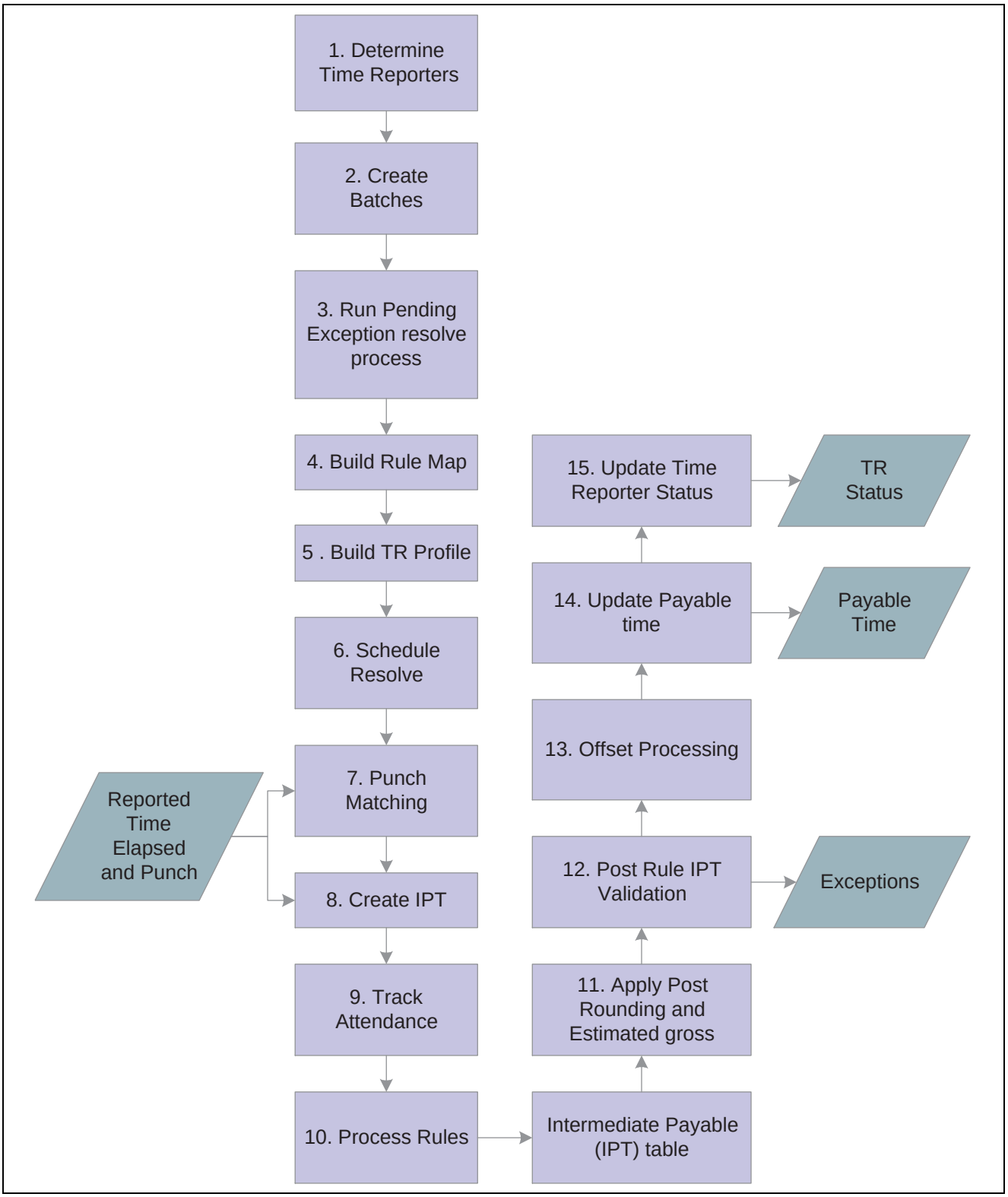
Program Name (Technical)	Function
TL_TA000200	Step 1: Determining Time Reporters to Process
TL_TA000300	Step 2: Combining Time Reporters into Batches
TL_EXC_RESL	Step 3: Cleaning Up Pending Time Reporting Exceptions
TL_TA000400	Step 4: Building the Rule Map
TL_TA000500	Step 5: Building Time Reporter Profiles
TL_TA000410	Step 6: Time Administration Main Batch Loop driver
TL_TA000420	Step 7: Batch driver calls other libraries of Time Administration

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Program Name (Technical)	Function
TL_ABS_RSVL	Resolve Absence Data
TL_TA000600	Step 8: Matching Punches
TL_SCHRES_AE	Schedule resolve callable routine.
TL_TA000700	Step 9: Creating Intermediate Payable Time
TL_TA000750	Step 10: Tracking Attendance
TL_TA000800	Step 11: Processing Rules
TL_TA000900	Step 12: Validate Data and Perform Estimated Gross
TL_VALID_MAIN	Step 13: Time Validation
TL_TA001000	Step 14: Processing Adjustments
TL_TA001100	Step 15: Updating Payable Time
TL_TA001300	Step 16: Updating TR Status

The following sections present detailed information about each of these steps.

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Time Administration process flow

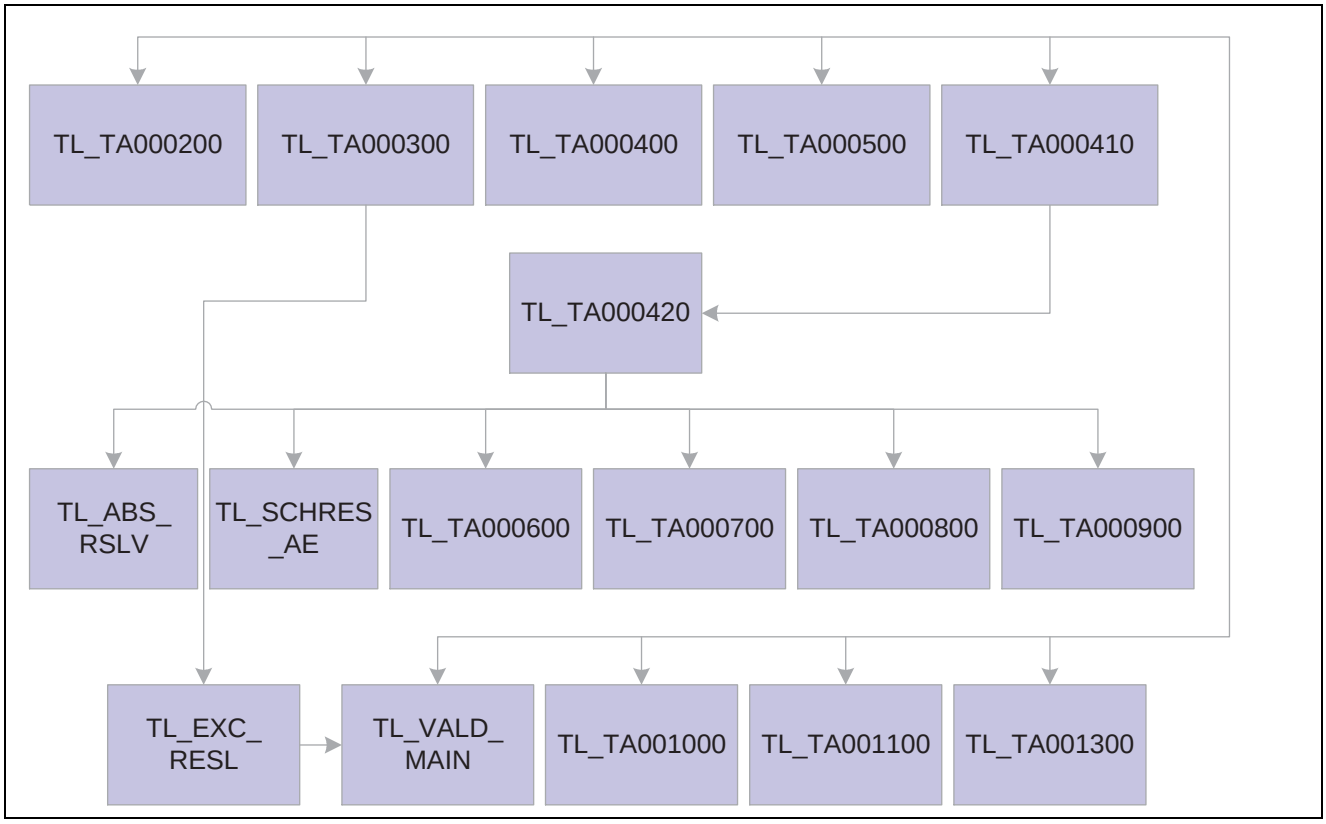
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Overview of the Time Administration Application Engine Processes

Time Administration, the core process in Time and Labor, produces payable time that is passed to other applications such as Payroll and Project Costing. It is critical that this process produces accurate results and successfully completes within a certain processing window. Time Administration is an iterative process that only processes records that need processing. Depending on the size of the population at your installation, you may need to configure Time Administration to run concurrently to reduce clock time in order to fit your processing window.

Time Administration is a complex process comprised of many Application Engine (AE) programs. The main driver for the Time Administration process is TL_TIMEADMIN. When invoked, TL_TIMEADMIN calls other Application Engine processes to perform various tasks. Most of these subprograms contain the prefix of TL_TA followed by a six-digit number starting from 000200 to 001300. Subprograms that do not contain a number have been added to increase performance.

The following diagram illustrates the subprograms called by TL_TIMEADMIN:



TL_TIMEADMIN Application Engine processes

The following table lists the Application Engine processes associated with Time Administration and describes:

- The function of each Application Engine.
- Tables accessed during the Application Engine process.
- Tables updated during the Application Engine process.

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Application Engine	Function	Tables Accessed/Updated
TL_ TIMEADMIN	This is the main Time Administration driver program. It performs initialization tasks, calls other AE programs to perform various tasks, and performs finalization tasks.	**Note.** The following table names listed ending with XX are temporary tables. You will need to replace XX with the correct temp table instance number before accessing them. Temp table instance number can be found in your AET log file or the Temp Tables tab of the Process Monitor while the process is running.
TL_TA000200	• Calls TL_RCTRL_AE to resolve population specified on the run control as group(s). • Selects all multiple jobs irrespective of TA status and earliest changed date even if multiple jobs are not specified on run.	Tables Accessed: TL_TR_STATUS – selects records with TA_STATUS of Y or X and EARLIEST_CHGDT <= Process Date. Tables Updated: TL_TA_TRLISTXX – contains a list of time reporters to be processed in subsequent steps of Time Administration.

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Application Engine	Function	Tables Accessed/Updated
TL_TA000300	• Groups time reporters into batches according to their workgroup, rule program, and start date. • Sets period of interest (POI) for each batch. Sets TA_STATUS to X for time reporters being processed. d. Identifies employee workgroups. e. Checks if multiple jobs are in the same workgroup. If so, multiple jobs are included in the same batch of the EmplID/Rcd specified on the run control or resolved from the group population. At this stage POI for these jobs is based on the minimum earliest change date of all the jobs where TA_STATUS ='Y'. If one of the jobs has a TA_STATUS ='N' that job is included. f. If multiple jobs are not in the same workgroup, the code checks the TL installation option to include multiple jobs. g. If the TL installation option is configured to include these jobs, they are placed in another batch and these batches are based on the earliest change date and TA status. h. If the installation options is configured not to run multiple jobs, then multiple jobs are removed from further processing when they are not in the same workgroup. i. Batches are further broken up based on the employee workgroup changes, and any Effdt change in a workgroup, and any Effdt change in the Rule program. The TL_EXC_RESL process occurs a this point to resolve pending time reporting exceptions (see the next row in this table). After all the above, the TA_STATUS is set to 'X' to restrict the same employee being processed in another Time Admin process in case of concurrent runs.	Tables Accessed: • TL_INSTALLATION – contains Batch Size. • TL_TA_TRLISTXX – contains list of time reporters to be processed. • TL_TR_STATUS – sets TA_STATUS to X for all time reporters being processed. **Note.** You can adjust the batch size (Max Employees In Rules Run) on the Installation Options page to increase or decrease the number of batches. Tables Updated: TL_TA_BATCH%XX – contains batches of time reporters. **Note.** There are many temp tables with the prefix TL_TA_BATCH that hold batch related data. TL_TR_STATUS – sets TA_STATUS to X for all time reporters being processed. **Note.** The Time Administration process deletes a batch when there is no reason to process the employees in the batch. The rows that are deleted from TL_TA_BATCH result in gaps in the table.
TL_EXC_ RESL	Resolves pending time reporting exceptions. This code (TL_EXC_RESL) runs as part of the TL_TA000300 step, as noted in section f in the previous row of this table. After it is runs, the TA_STATUS is set to 'X' in the current batch if there are no more exceptions, or if theContinue with Exceptions check box is selected in the Time Administration Options group box on the TL Installation page.	If there still are high severity exceptions that are not resolved (from source TVP / TVE) and if theContinue with Exceptions check box is cleared in the Time Administration Options group box on the TL Installation page, TimeAdmin will remove those employees from the current batch.

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Application Engine	Function	Tables Accessed/Updated
TL_TA000400	Creates rule maps – contains rules to be executed in priority order for each batch.	Tables Accessed: TL_TA_BATCHXX – contains batches of time reporters. Tables Updated: • TL_TA_BAT_SUMXX – contains high-level rule information to be executed for each batch. • TL_RULE_MAPXX – contains detailed rule information to be executed in priority order for each batch.
TL_TA000500	Calls TL_TRPROFILE – to create time reporter profiles. If Time and Labor is integrated with Global Payroll or Payroll for North America using Absence Management, or both, this step loads the Workgroup, PNA pay group and GP pay group attributes, including holiday configurations.	Tables Accessed: TL_TA_BATCHXX – contains batches of time reporters. Tables Updated: • TL_PROF_LISTXX – contains a list of time reporters for all batches being processed. • TL_PROF_WRKXX – contains a list of time reporters with JOB, EMPLOYMENT, PERSONAL, BADGE, and Time and Labor data. **Note.** TL_PROF_WRKXX can be used in custom rules to improve performance.
TL_TA000410	• Verifies that the PSTZOFFSET table contains entries for the current period of interest. • Calls TL_TA000420 in a loop to process a batch of time reporters at a time.	Tables Accessed: • PSTZOFFSET – contains time zone offset data. • TL_RULE_MAPXX – contains detailed rule information to be executed in priority order for each batch. Tables Updated: None

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Application Engine	Function	Tables Accessed/Updated
TL_TA000420	• Truncates temporary tables contained in TL_WORK_TABLES. • Updates Run Time Statistics. • Calls TL_SCHRES_AE – to resolve schedules. • Calls TL_ABS_RSLV – to resolve absences. • Calls TL_TA000600 – to match punches, pre-rule punch rounding and applies day breaker options. • Calls TL_TA000700 – to create intermediate payable time (IPT). • Calls TL_TA000750 – to process attendance data. • Calls TL_TA000800 – to apply rules. • Calls TL_TA000900 – to apply post rule rounding, and to distribute the task profile.	Tables Accessed: TL_TA_BATCH%XX – contains batches of time reporters. Tables Updated: TL_TA_BATCH%XX – contains batches of time reporters. Start date and end date get adjusted when there are changes.
TL_SCHRES_AE		Tables Accessed: TL_PROF_WRK – contains time reporter data. Tables Updated: WRK_ADHOC_TAOXX
TL_ABS_RSLV		Tables Accessed: • WRK_ADHOC_TAOXX,TL_RPTD_TIME • GP_ABS_EVENT – contains absence data. Tables Updated: • TL_ABS_WRKXX – contains absence data by DUR. • TL_TOTAL_QTYXX – contains employees quantity of reported time, scheduled time, absence by DUR.

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Application Engine	Function	Tables Accessed/Updated
TL_TA000600	Converts punch time into elapsed time by calculating duration between two consecutive punches. Applies day breaker options and applies pre-rule punch rounding. Before inserting schedule punch time into the punch match table, the system checks for absence data for the days.	Tables Accessed: • TL_RPTD_TIME – contains punch time entries. • WRK_ADHOC_TAOXX – contains schedule details and applies day breaker options to schedule punch time. Tables Updated: TL_MTCHD_1XX – contains matched punches.
TL_TA000700	Load absences (if integrated). Creates intermediate payable time (IPT) from matched punches (created by TL_TA000600), and reported elapsed time. Scheduled time is only created for workgroups with exceptions.	Tables Accessed: • TL_MTCHD_1XX – contains matched punches. • TL_RPTD_TIME – contains reported elapsed time. • WRK_ADHOC_TAOXX – contains scheduled time. • TL_TOTAL_QTYXX • TL_ABS_WRKXX – contains absence events reported in Global Payroll and Absence Management. Tables Updated: TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch.

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Application Engine	Function	Tables Accessed/Updated
TL_TA000750	Processes attendance data.	Tables Accessed: • TL_IPT1– contains intermediate payable time data for all time reporters in the current batch. • WRK_ADHOC_TAOXX – contains scheduled time. • TL_ATTEND_PGMXX – contains attendance program data. Tables Updated: • TL_IPT1– contains intermediate payable time data for all time reporters in the current batch. • TL_ATTEND_HIST – contains attendance history data. • TL_ATTENDANCE – contains current attendance data.
TL_TA000800	Calls TL_TA_RULES to apply rules in the order specified on the rule program for each batch.	Tables Accessed: • TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch. • WRK_ADHOC_TAOXX – contains scheduled time. • TL_PROF_WRKXX – contains time reporter profiles. Tables Updated: TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch.

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Application Engine	Function	Tables Accessed/Updated
TL_TA000900	• Calculates estimated gross amounts. • Applies rounding rules.	Tables Accessed: • TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch. • WRK_ADHOC_TAOXX – contains scheduled time. • TL_PROF_WRKXX – contains time reporter profiles. Tables Updated: TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch.
TL_VALD_ MAIN	Post rule validation • Validates data and issues exceptions based on the validation and exception configuration. (Validations are not run on absence rows.) • Deletes resolved exceptions (no longer exists in TL_EXCEPT_WRK) from TL_EXCEPTION. • Inserts new exceptions into TL_EXCEPTION. • Updates unresolved exceptions with current date/time stamp.	Tables Accessed: • TL_VALID_DATAxx — join of TL_RPTD_TIME and TL_IPT1 tables. All validations executed on this one record. Multiple exceptions can exist for each day. • TL_EXCEPT_WRKXX – contains a list of exceptions in the current batch. • TL_EXCEPTION – contains updated exceptions.

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Application Engine	Function	Tables Accessed/Updated
TL_TA001000	Creates offsets. Creates offsets for absence rows that are from Global Payroll only. **Note.** Payroll for North America processes create offsets for absences and passes negative absence rows into TL_PAYABLE_TIME.	Tables Accessed: • TL_IPT1XX– contains intermediate payable time data for all time reporters in the current batch. • TL_PAYABLE_TIME – contains payable time previously created. • TL_TA_BATCHXX – contains a list of time reporters in the current batch. Tables Updated: • TL_TA_SE_DATEXX – contains a list of employees in the current batch with start date and end date. • TL_TA_PAY_TMXX – contains payable time records for the current batch within start date and end date. • TL_TA_OFFST01XX – contains payable time rows from TL_PAYABLE_TIME. • TL_TA_OFFST02XX – contains intermediate payable time rows from TL_IPT1. Excludes rows if the RT_SOURCE is 'AM' or if the PAY_SYSTEM is 'NA.' • TL_TA_OFFSETXX – contains offset rows to be inserted into TL_PAYABLE_TIME. • TL_IPT1XX – contains intermediate payable time for the current batch. IN_BATCH field gets set to 'N' in TL_TA001000 for previously processed payable time rows that have not changed.

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Application Engine	Function	Tables Accessed/Updated
TL_TA001100	• Calls TL_TA001200 – to process exceptions. • Deletes existing payable time or forecasted payable time. • Inserts new rows of payable time or forecasted payable time. • Updates Payable_Status on TL_PAYABLE_TIME. • Calls TL_PTCOMPB – to process Comp Time. • Deletes absence rows from TL_IPT1 if PNA is the payroll system and online rules are not run. • Does not delete absence rows if online rules are run, regardless of the payroll system (GP or PNA).	Tables Accessed: • TL_TA_SE_DATEXX – contains a list of employees in the current batch with start date and end date. • TL_PAYABLE_TIME – contains payable time previously created. • TL_TA_BATCHXX – contains a list of time reporters in the current batch. • TL_TA_OFFSETXX – contains offset rows to be inserted into TL_PAYABLE_TIME. Tables Updated: • TL_TA_PAYW_TMXX – contains payable time records for the current batch within start date and end date. • TL_TA_PAY_TMXX – contains sequenced payable time records for the current batch within start date and end date. • TL_PAYABLE_TIME – contains updated payable time.
TL_TA001300	• Sets TA_STATUS to *N* and ECD to Null for positive time reporters without exceptions. • Sets TA_STATUS to *Y* and ECD to the first day of the next period for exception time reporters without exceptions • Sets TA_STATUS to *Y* and ECD to the first instance of unresolved exception for all time reporters with exceptions.	Tables Accessed: • TL_TA_BATCHCXX – contains a list of time reporters in the current batch. • TL_EXCEPTION – contains all exceptions. • TL_TRSTAT_BFRXX – contains a list of time reporters for the current batch. • TL_TR_STATUS – contains a row for each time reporter enrolled in Time and Labor. Tables Updated: TL_TR_STATUS – contains an updated row for each time reporter enrolled in Time and Labor.

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Understanding the Time Administration Control Table (TL_TR_STATUS)

TL_TR_STATUS is a control table in Time and Labor that is regularly updated by Time Administration and other processes. It is important to understand how and when this record gets created and updated, since it essentially controls the behavior of Time Administration.

When time reporters are enrolled in Time and Labor, the system creates a TL_TR_STATUS control record for each distinct time reporter. This control table is updated when certain changes are made to time related data. Specifically, there are two fields that tell Time Administration how much data to process for each time reporter:

- TA_STATUS
- EARLIEST_CHGDT

For exception and positive time reporters, TA_STATUS is initially set to Y and EARLIEST_CHGDT is set to the Time and Labor enrollment date.

When changes are made to reported time, EARLIEST_CHGDT gets updated if EARLIEST_CHGDT is later than the change date and TA_STATUS is set to *Y*.

Time Administration selects records with TA_STATUS = Y or X and EARLIEST_CHGDT is earlier or equal to the Process Date specified on the run control to be processed.

At the beginning of Time Administration (TL_TA000300), TA_STATUS gets set to *X* to indicate to other processes that it is being processed.

At the end of Time Administration (TL_TA001300), TA_STATUS and EARLIEST_CHGDT get updated as follows:

- For positive time reporters without exceptions, TA_STATUS gets set to *N* and EARLIEST_CHGDT gets set to the latest date of payable time. If no changes are made to reported time, positive time reporters will not be selected for processing in subsequent Time Administration runs.
- For exception time reporters without exceptions, TA_STATUS gets set to *Y* and EARLIEST_CHGDT gets set to the first day of the next time period (specified on work group). Exception time reporters will always be selected for processing in subsequent Time Administration.
- For all time reporters with exceptions, TA_STATUS gets set to*Y* and EARLIEST_CHGDT gets set to the first day of the exception. This way, exceptions will be processed and resolved.

Batch Processing Terms and Concepts

The following terms and concepts are used throughout the documentation on batch processing, and are defined:

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).

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Process Instance Has a process instance value when the TL_TR_STATUS was last updated by a batch process, such as Time Admin or Submit Time.

Step 1: Determining Time Reporters to Process

This process can be divided into two phases.

Phase 1: Select Time Reporters for Processing

This process is initiated when you select groups or individuals to process on the Time Administration run control page. Among the groups or individuals you select, Time Administration processes those meeting the following 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.

All multiple jobs are loaded even if not specified on the run control page, irrespective of TL installation option. The TL installation option is used later on in the TL_TA000300 routine.

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

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Time Reporters into Batches, and are used to help group the population you are processing into batches.

In what follows we discuss:

- How Time Administration 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.
- 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.
- How Time Administration defines the initial period of interest.

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Launching the Time Administration Process, page 371

Chapter 5, "Establishing Workgroups," page 75

Chapter 4, "Setting Up Basic Tables," Understanding General Rules for Building Periods and Calendars, page 53

Using Time Reporter Status in the Selection Process

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 as follows:

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).

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Field Name	Description
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.

As a rule, 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.

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.

The TA_STATUS and EARLIEST_CHGDT 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 time 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).

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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:

- Report Time by Period, Web Clock, and 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 initiates 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 2002. 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 2000. Because time reporter A only has time date going back to 5 January 2002, his earliest change date will be set to 5 January 2002.

The following table describes the conditions that update the Earliest Change Data and TA Status:

Condition	ECD (Earliest Change Date)	TA Status
1. Upgrade: When Payable time exists	Maximum Date of Payable Time + 1 date in Payable Time	Y
2. Upgrade: When no payable time exists	Current Datetime	Y
3. When Employee Enrolled in T&L	Either TL Enrollment Date or Date > Effective Date entered in (Payable Time Start field on Create Time Reporter Data)	Y
4. When Employee changes from Positive to Exception Workgroup, or Workgroup type is changed from Positive to Exception	All Employees impacted are determined, and ECD becomes the Effective date of the change, if current ECD > Effective date of the change	Y (Changed from N to Y)
5. Positive Workgroup: When Out Punch is missing for Max Date processing	ECD will remain on missing out punch date	N
6. Positive Workgroup: When Out Punches are reported or time for Elapsed Reporter is processed	Next Period Begin Date	N
7. Positive Workgroup: When Exceptions are generated	Minimum date of Exception Generated	Y

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Condition	ECD (Earliest Change Date)	TA Status
8. Exception Workgroup: When time is processed for the current period	Next Period Begin Date	Y
9. Exception Workgroup: Exceptions are generated	Minimum date of Exception Generated	Y
10. In case of Holiday: If the maximum date of payable time generated, is less than the End date of the Period of Interest (POI). ECD will be adjusted to the holiday date to trigger holiday template rules.	To the date of Holiday date.	TA Status will depend on positive or exception workgroup

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 16, Updating TR Status.

Updating Status as a Result of a Processing Exception

When an exception of high 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 September 7, 2004 through September 21, 2004, where TA_STATUS = Y and EARLIEST_CHGDT = September 7, 2004. After Time Administration is run, an exception is created for September 15, 2004. TA_STATUS remains *Y* and EARLIEST_CHGDT is reset from September 7 to September 15.

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Launching the Time Administration Process, page 371

Chapter 4, "Setting Up Basic Tables," Defining Exceptions, page 68

Chapter 4, "Setting Up Basic Tables," Using Validation Criteria, page 71

Defining the Initial Period of Interest

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.

Important! The explanation of the initial period of interest above, 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.

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.

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The TL_TA_TRLIST table has the following structure:

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:

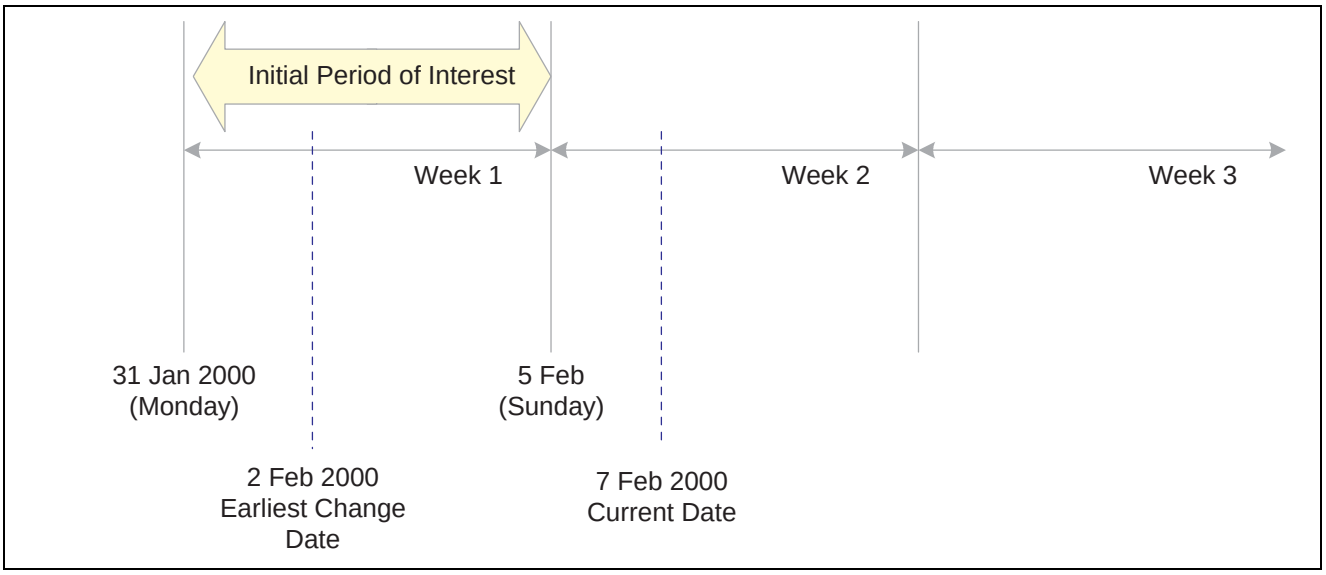
- It determines the EARLIEST_CHGDT for the time reporter being processed.
- It identifies the time reporting period (based on the Time Period ID in the workgroup table) intersected by the EARLIEST_CHGDT.
- It uses the begin and end dates of the time reporting period intersected by the earliest change 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:

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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 January 31, 2000 (Monday) and ends on February 5, 2000 (Sunday). The system uses the begin and end dates of this week to establish the initial period of interest: January 31 − February 5.

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 workgroup affiliation.

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. 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. Send batches to Rule Map.

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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

Chapter 5, "Establishing Workgroups," Making Workgroup Transfers, page 97

Chapter 5, "Establishing Workgroups," Making Changes to a Rule Program of a Workgroup, page 99

Step 3: Resolving Pending Time Reporting Exceptions

The TL_EXC_RESL process validates reported time for the days where there are unresolved exceptions. This process calls validation application engine sections for only those exceptions which are still unresolved. It does not call all the validations as defined in the validation set.

This process clears exceptions if exceptions are not recreated.

This process also recreates exceptions if they are still unresolved.

The Clean Up Exception process (run by clicking the Clean Up Exceptions button) on the Manage Exceptions page, doesn't have to be run as Time Admin cleans up exceptions. However if a user would like to be proactive about exceptions, this process can be run.

If exceptions are recreated, Time Admin will not process data for the days of the exceptions for that time reporter.

In addition, the process excludes employees from further processing when there are exceptions, if, on the Time and Labor installation page, the Continue with Exceptions field is not selected.

Step 4: Building the Rule Map

The initial period of interest used to create batches of time reporters in Step 2 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. 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.

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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

As noted earlier, the initial period of interest constitutes only the first step in the definition of a period for rules processing.

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 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.

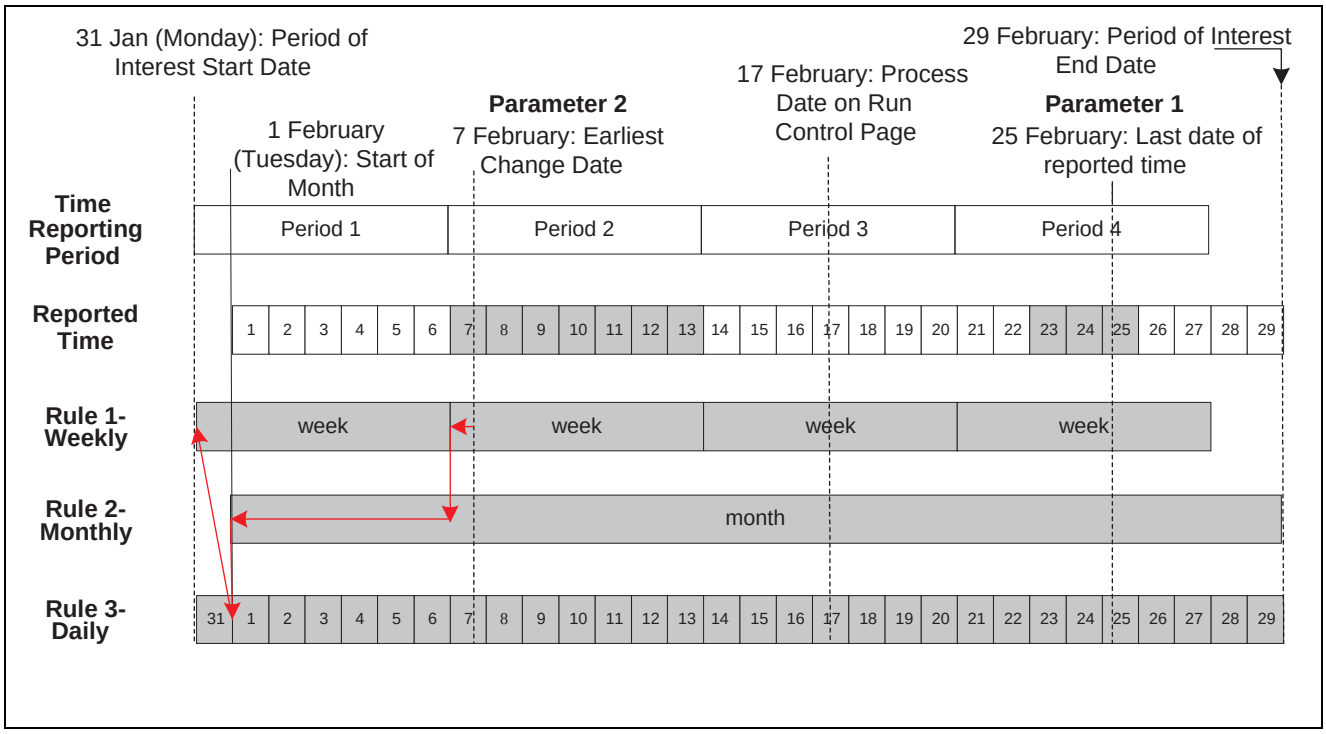
The following example illustrates how the system determines the maximum date range for the final period of interest:

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 February 7 to February 13 (Monday through Sunday).
- The last period processed for the payee is the week of January 31 (Monday) through February 6 (Sunday).
- The current week (the week to be processed) begins on February 7.
- 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 February 7.
- The Process Date on the run control page is February 17.
- The latest date of reported time is 25 February (in this example, the employee has reported a future vacation from February 23 to February 25).

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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 February 25. 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 February 29, 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 (February 7).
  - 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 (February 1).

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- 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 February 1).
- 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 January 31 and ends February 6 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 (February 1), 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 January 31.

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 January 31, 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 January 31. If the weekly overtime rule does not include the first day of the workweek— January 31—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.

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In addition, Payable Time includes:

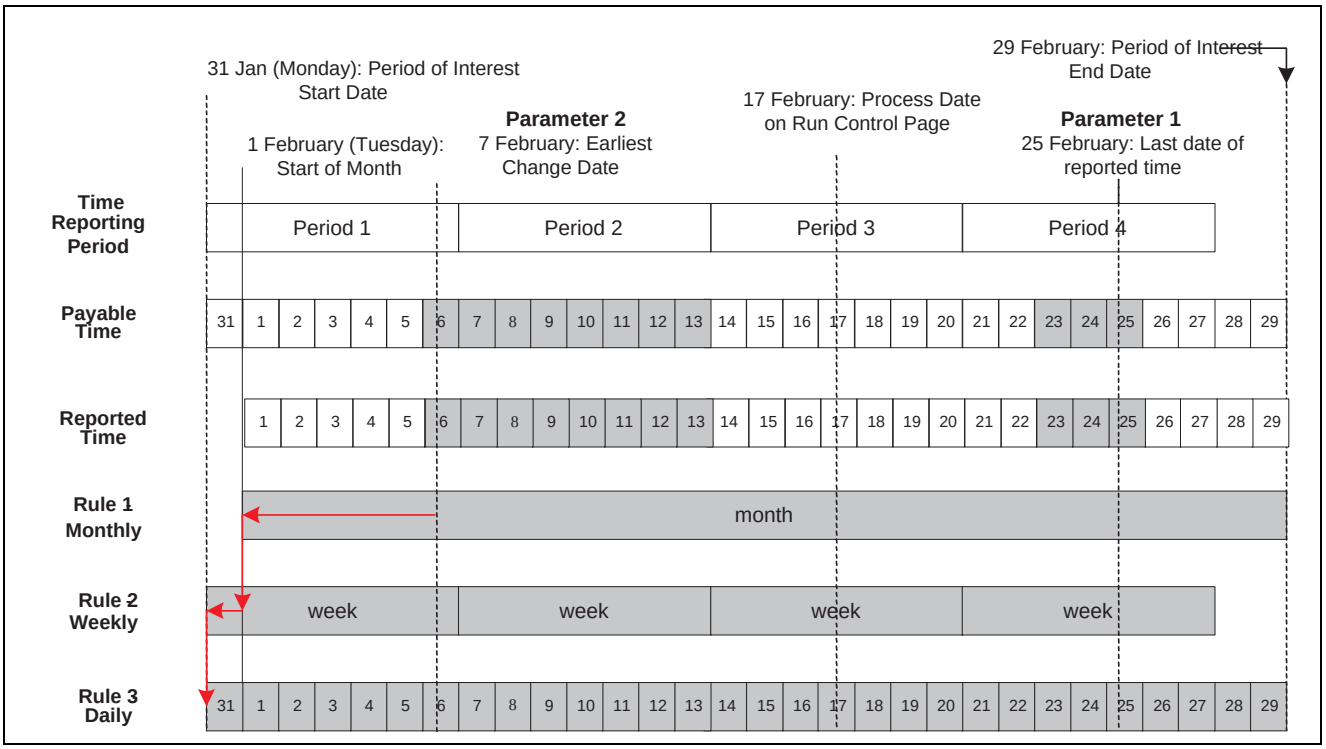
- Any positively reported time for dates before the current workgroup period.
- Any positively reported time for dates following the current workgroup period.
- Payable Time also includes days for which time has been created using rules processing.

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 February, a day that has already been processed and sent to payroll: He originally reported working 8 hours on 6 February 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.

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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 February 7 and ends on February 13. 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 June 6—a day that falls within a previously processed period (he originally reported working 8 hours on February 6 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: February 23, 24 and 25 . 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 February 6 (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 February 1-5 at the normal rate, these days (marked by cross-hatching in the diagram) are recalculated, offsets generated, and new data sent to Payable Time.

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Note. The Process Date, Use Current Date or Use Reported Time for POI fields on the run control page, have 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. However, in addition to selecting time reporters for processing, it also aids in determining the end date to process. The end date equates to the time period end date based on the field selected: Process Date, Use Current Date or the maximum date reported for Use Reported Time for POI field.

Rules for Exception Reporters

To create Payable Time for exception reporters:

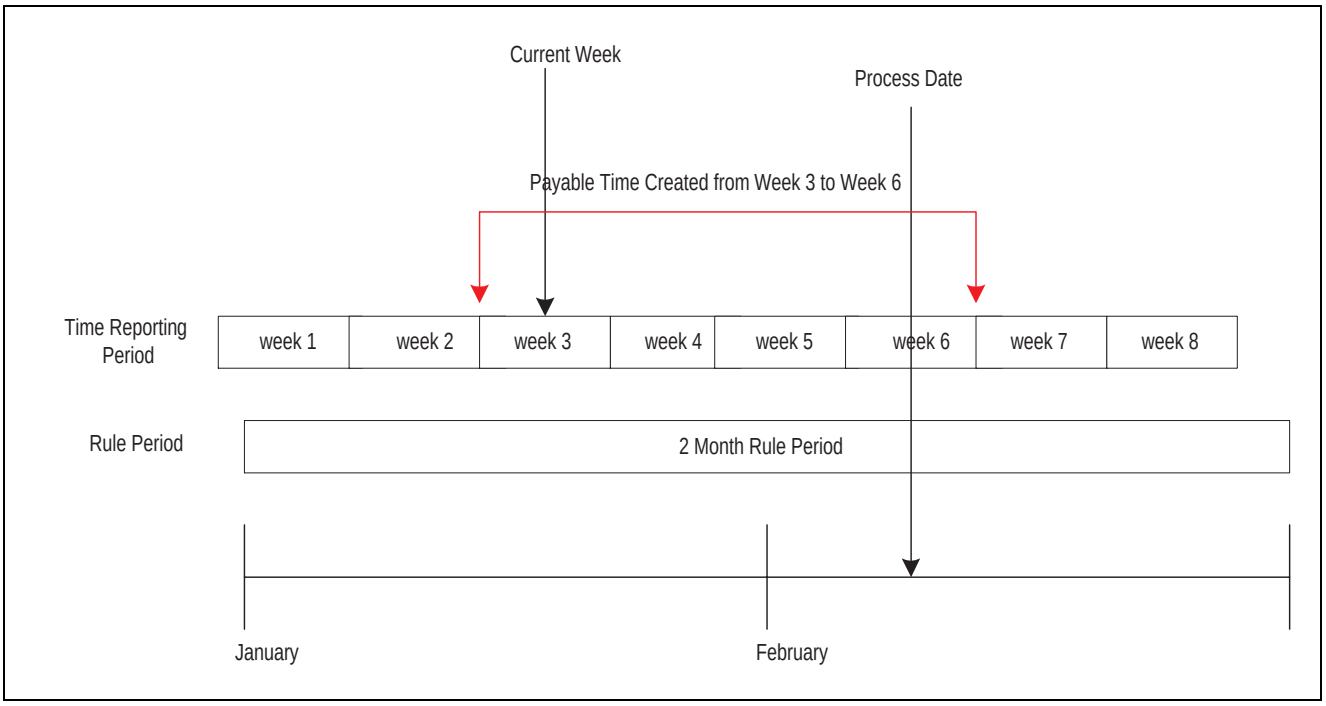
- Time Administration creates Payable Time from the time reporters' schedules for all dates within the current time reporting period (as long as the current period falls within the period of interest). If any day within this period has positive time reported for it, the positive time takes precedence 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.

Example 1: Expanding Payable Time to the End of a Future Workgroup 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.

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Payable Time extends to future period

Assume the following:

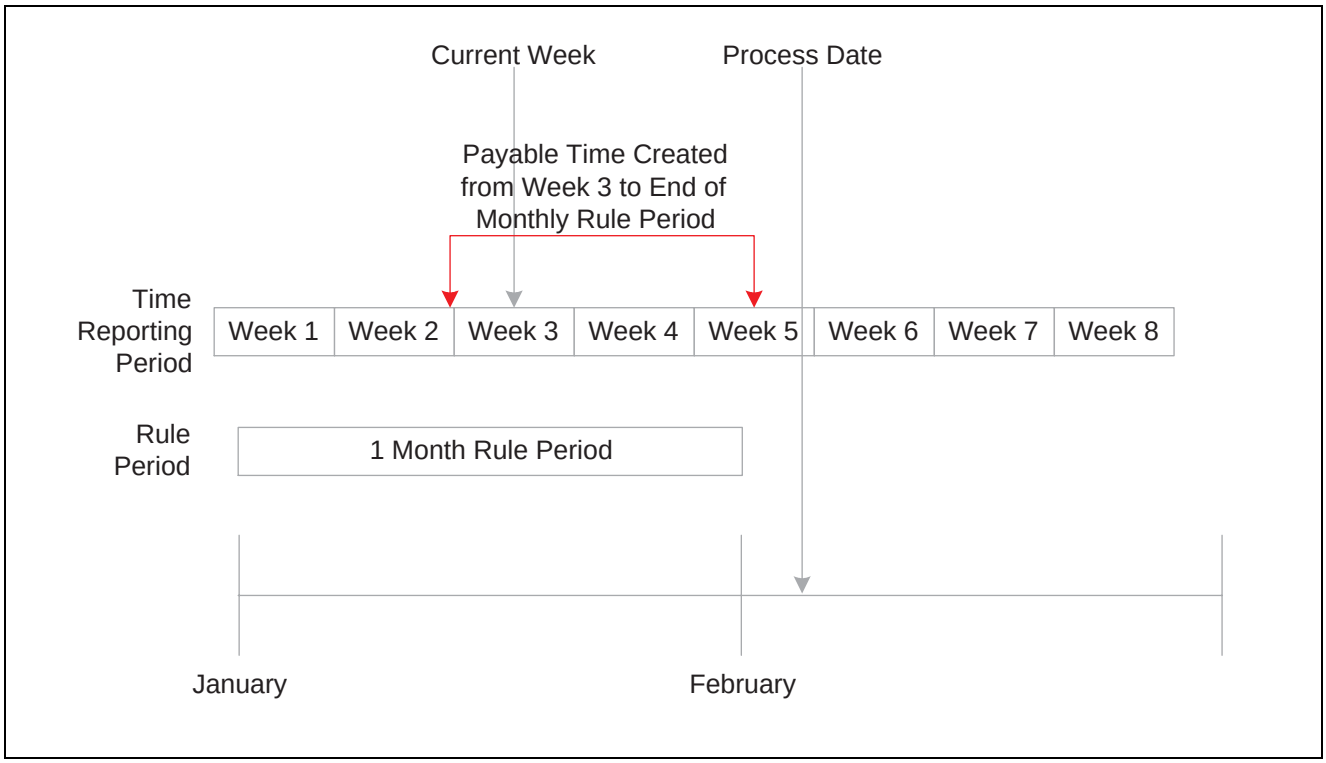
- Week 3 is the current workgroup period (the week to be processed).
- There is a two-month rule associated with the workgroup.
- The Process Date is set to Week 6.

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

This is an example in which the end of rule period limits the extension of payable time.

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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:

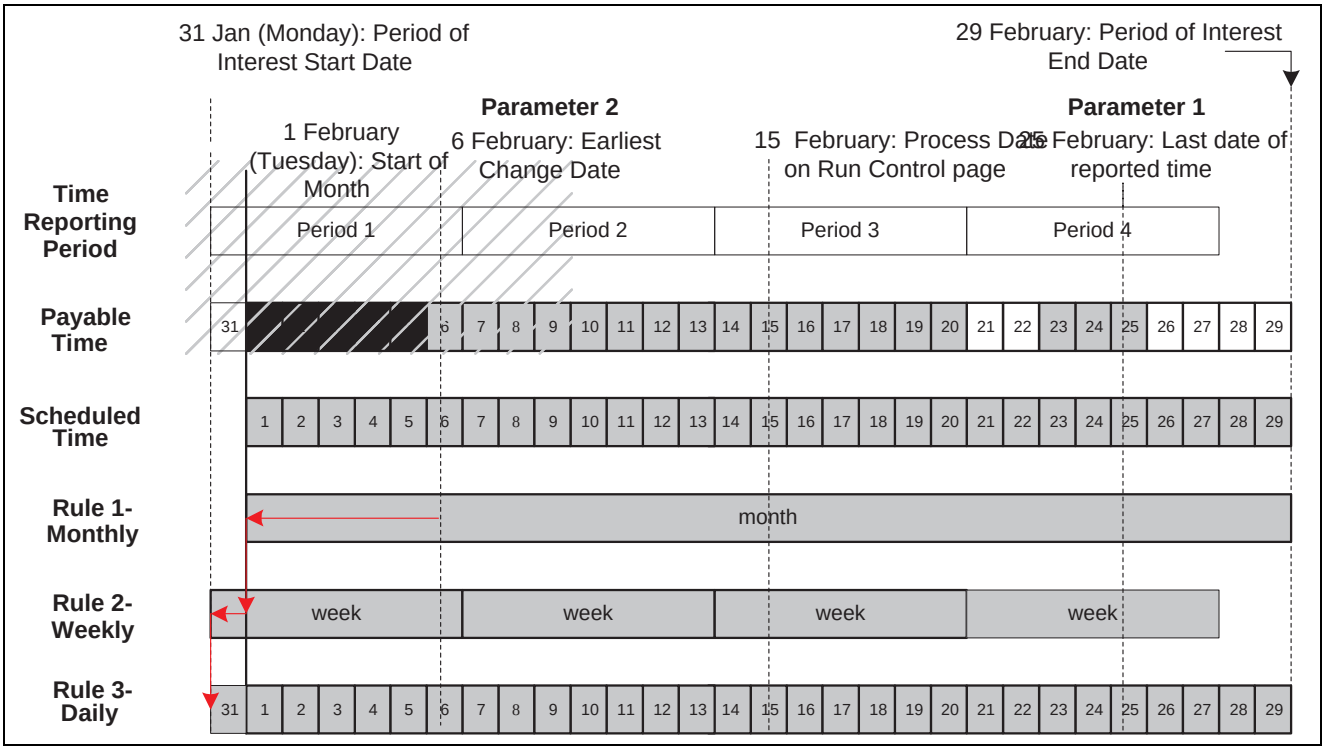
Example 3: Determining Payable Time for Exception Reporters

Assume that the following is true:

- The time reporter you are processing is an exception time reporter.

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- 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 January 31 (Monday) through February 6 (Sunday).
- The current week (the week to be processed) begins on February 7.
- 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 February 6.
- The Process Date on the run control page is February 15.
- The latest date of reported time is February 25 (in this example, the employee has reported a future vacation from February 23 to February 25).
- 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 February 6—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 February 7 and ends on February 13. 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 (February 15) 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).

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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 June 6—a day that falls within a previously processed period (he was scheduled to work 8 hours on June 6 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: February 23, 24 and 25 . 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 February 6 (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 February 1-5 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

Chapter 13, "Understanding the Batch Process in Time Administration," Launching the Time Administration Process, page 371

Step 5: 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

Chapter 12, "Creating Rules in Time Administration," page 227

Step 6: Explaining the Time Administration Main Batch Loop Driver

TL_TA000410 checks that there are time reporters to process. If there are time reporters to process, TL_TA000410 calls TL_TA000420 for each batch.

TL_TA000410 also ensures that the PSTZOFFSET table is appropriately loaded for the POI that Time Admin is processing and allocates the Payable Time Sequence Number.

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Step 7: Explaining Batch Driver Calls of Time Administration

TL_TA000420 truncates all tables used within the TL_TA000420 loop. It then checks if reported time exists for positive time reporters. If no reported time exists it executes TL_TA0001300 to set the ECD to the next period begin date.

It then checks if reported punch time exists and conditionally calls TL_TA000600 when either reported time exits or scheduled time has punch schedules.

It then calls the TL_TA000800 rules engine driver program and then calls the TL_TA000900 process which distributes task and post rules rounding.

If Paybill is installed the Paybillstaffing process FO_TL_OVR_RT is called to update the override rate. The Comp Time process is called to validate comp time balances for each batch. All the intermediate payable time is accumulated into the TL_VALID_DATAxx table.

Step 8: 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 Payable 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_TIME).

   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, and 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.

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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 11 − 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.

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 5:00 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 Payable Time is selected on the Run Control page. This is because time reporter schedules already contain the calculated duration between punches.

See Also

Chapter 5, “Establishing Workgroups,” Setting Up Day Breaker Options, page 89

Step 9: 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).

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This section discusses 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

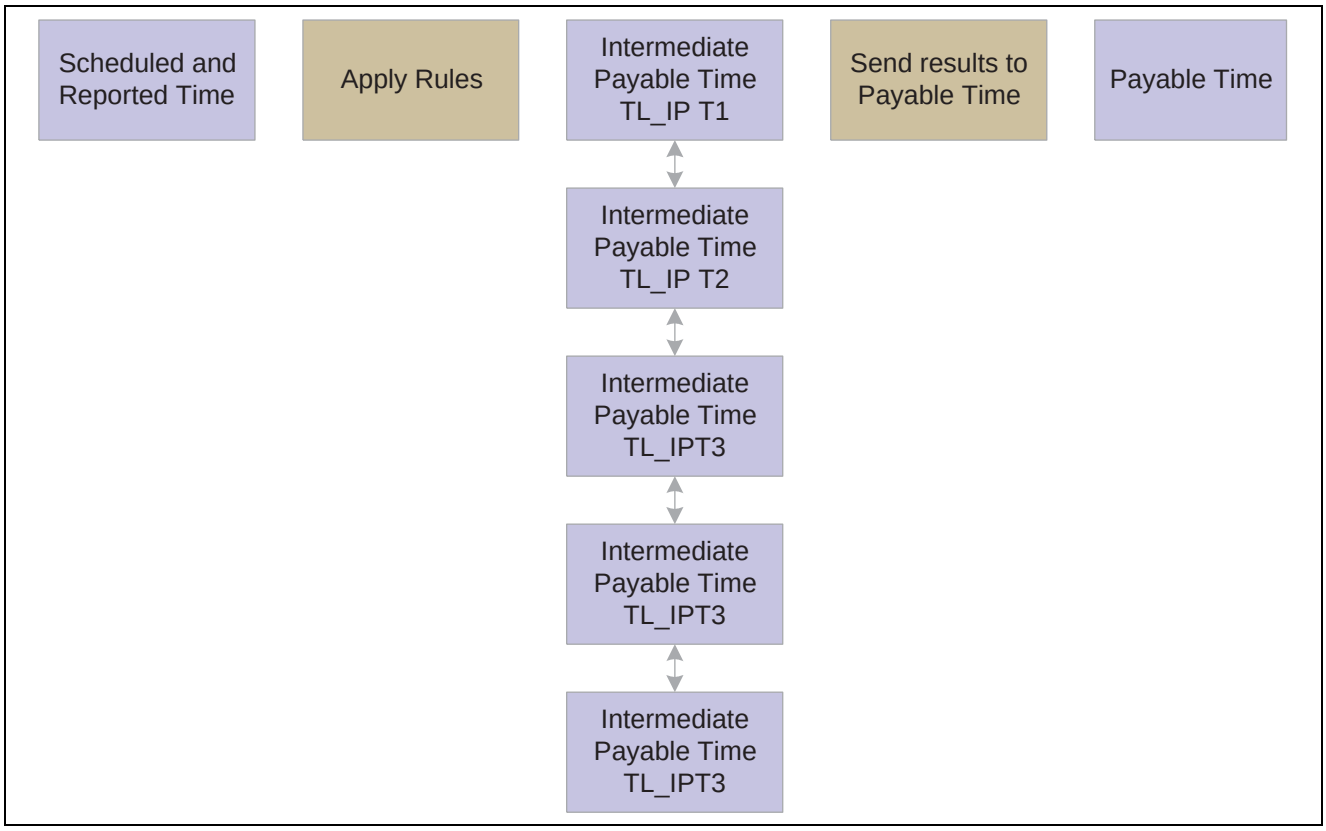
Initially, Time Administration loads all reported and scheduled time data for all time reporters who must be processed into TL_IPT1. In your rules, you can move data back and forth between TL_IPT1 and the other Intermediate Payable Time Tables, or to other working tables in the system. For example, your 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:

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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, This information is used later by the Create Payable Time process.

Reported Time

The following applies to reported time:

- For elapsed time reporters, the system retrieves reported elapsed time from the Elapsed Time Table (TL_RPTD_TIME).
- 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.

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Absences

If your Time and Labor system is integrated with Global Payroll, Payroll for North America with Absence Management, or both, this step loads absence rows to TL_IPT1. Approved absences are loaded to the TL_AM_WRK table from the GP_ABS_EVENT table, which contains absence events reported in Global Payroll or Absence Management. The system resolved the rows for holiday configurations, time reporting codes and schedules.

Task Information

The following applies to tasks:

- 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

Chapter 7, "Defining Task Reporting Requirements," page 123

Chapter 12, "Creating Rules in Time Administration," page 227

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.

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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

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Field Name	Description
RULE_ELEMENT_3	Rule Element 3 - to be used in custom rules
RULE_ELEMENT_4	Rule Element 4 - to be used in custom rules
RULE_ELEMENT_5	Rule Element 5 - to be used in custom rules
RULE_FLAG1	Rule Flag 1 - to be used in rules
RULE_FLAG2	Rule Flag 2 - to be used in rules
RULE_FLAG3	Rule Flag 3 - to be used in rules
RULE_FLAG4	Rule Flag 4 - to be used in rules
RULE_FLAG5	Rule Flag 5 - to be used in rules
TASKGROUP	Task Group
DFLT_TASKGROUP	Default Task Group
TASK_PROFILE_ID	Task Profile ID
DFLT_TASK_PROF_ID	Default Task Profile ID
DFLT_TASKTMPL_ID	Default Task Template ID
PERIOD_INSTANCE	Period Instance - to be used in rules
PERIOD_SEQUENCE	Period Sequence - to be used in rules
PAYABLE_STATUS	Payable Status
IN_BATCH	In Batch (only records with IN_BATCH = *Y* will be written to TL_PAYABLE_TIME)
OFFDAY_IND	Off Day Indicator
TRC	Time Reporting Code

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Field Name	Description
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

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Field Name	Description
ACCT_CD	Account Code
BUSINESS_UNIT_PC	Business Unit Project Costing
BUSINESS_UNIT_PF	Business Unit Project Performance Measurement
PROJECT_ID	Project ID
SETID_ACTIVITY	Set ID Activity
ACTIVITY_ID	Activity ID
RESOURCE_TYPE	Resource Type
SETID_RESOURCE	Set ID Resource
RESOURCE_CATEGORY	Resource Category
RESOURCE_SUB_CAT	Resource Subcategory
TASK	Task
USER_FIELD_1	User Defined Field 1 - additional task field defined by the user
USER_FIELD_2	User Defined Field 1 - additional task field defined by the user
USER_FIELD_3	User Defined Field 1 - additional task field defined by the user
USER_FIELD_4	User Defined Field 1 - additional task field defined by the user
USER_FIELD_5	User Defined Field 1 - additional task field defined by the user
TL_RULE_ID	Rule ID - to indicate that the record has been updated or inserted by a rule

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Field Name	Description
ORIG_TRC	Original Time Reporting Code (TRC can be changed by rules)
ORIG_TL_QTY	Original Quantity (Quantity can be updated by rules)

Step 10: 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

Chapter 12, "Creating Rules in Time Administration," page 227

Step 11: 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 4 − 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

Chapter 12, "Creating Rules in Time Administration," Adding Rules to a Rule Program, page 311

Step 12: Performing Rounding, Task Distribution and Estimated Gross

This process performs the following functions:

- Calculates and validates leave and comp time balances.

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- Updates each time reporter's task profile.
- Applies post rules rounding to processed time data.
- Calculates estimated gross amounts.

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 is mapped 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. 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.

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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.

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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.
4. Load Compensatory Time Off rows into Comp Leave table (TL_COMPLEAV_TBL). The system summarizes the time for each day for Comp Time Earned and Taken , calculates the expiration dates for the earned rows, and loads the time into the TL_COMPLEAV_TBL with the End Balance=0.
5. Calculate the end balance for each day.

   The system calculates the end balance for each day by taking into consideration the comp time hours earned, hours taken, and hours expired for each day and then updates the end balance on the TL_COMPLEAV_TBL.
6. 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.
7. Calculate comp time earned.
8. 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.

Important! Comp Time exception TLX00001 must be set to 'high' severity. A 'low' or 'medium' severity exception can create payable time. However, if the time reporter is reporting a comp TRC that is not in his comp plan, this is still an exception. Although the system can create the payable time, it cannot update the comp time balance. Therefore keep the severity of this exception as "High."

See Also

Chapter 4, "Setting Up Basic Tables," page 15

Chapter 6, "Establishing Time Reporting Codes," Defining TRC Programs, page 117

Appendix A, "Exceptions and Validations," page 659

Expand Task Profiles

When a task profile is reported positively or has been updated by the system during Step 9--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.

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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 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

Chapter 5, "Establishing Workgroups," page 75

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:

2. The Comp Rate Code Table (PS_COMP_RATECD_TBL). If the comp rate is not there, it then checks:

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3. The Compensation Table (PS_COMPENSATION); if the comp rate is not there, it then checks:
4. The Job Code Table (more specifically, the PS_JOBCD_COMP_RATE field on PS_JOB).
    a. 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 rates 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.

    b. 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.

    c. 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.
5. 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.
6. 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 13: Post Rule Validation

This step validates the data generated as a result of rules processing of task data and TRC data. Numerous validations are run during post rules processing. All the exceptions generated by these validations are delivered with 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.

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.

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Note. Customers should configure and use a validation set rather than enabling all validations to run.

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.

See Also

Chapter 4, "Setting Up Basic Tables," Using Validation Criteria, page 71

Appendix A, "Exceptions and Validations," page 659

Step 14: Processing Adjustments

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 discusses the process that generates offsets for normal adjustments.

See Also

Chapter 14, "Understanding Payable Time," page 387

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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 by Payroll	Y
PD – Distributed	Y
DL – Diluted	Y
ES – Estimated	N

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Payable Status	Create Offsets?
NA – Needs Approval	N
OE – Online Estimate	N
NP – No Pay	N
IG – Ignore	Y
RV – Reversed Check	Y

- 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.

Note. This step creates offsets for absence rows that are from Global Payroll only. Payroll for North America process create offsets for absences and updates payable time with negative absence rows.

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:

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#	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

Chapter 14, "Understanding Payable Time," page 387

Step 15: 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 Project Costing, 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 Project Costing. 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

Chapter 13, "Understanding the Batch Process in Time Administration," Step 4: Building the Rule Map, page 336

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 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.

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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
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

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PUNCH_ TYPE	PUNCH_ BEGIN	PUNCH_END	TL_ QUANTITY	TRC	TASK
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

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PUNCH_TYPE	PUNCH_BEGIN	PUNCH_END	TL_QUANTITY
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:

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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

Chapter 12, "Creating Rules in Time Administration," Creating Rules from A Template, page 266

Step 16: Updating Time Reporter 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 the latest date of payable time in the TL_PAYABLE_TIME table. 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.

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Viewing Time Reporter Status

This section discusses how to view time reporter status.

Understanding 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 as you expect. 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 updated to the latest date of payable time, and the TA_Status should be set to *N* (No).

See Also

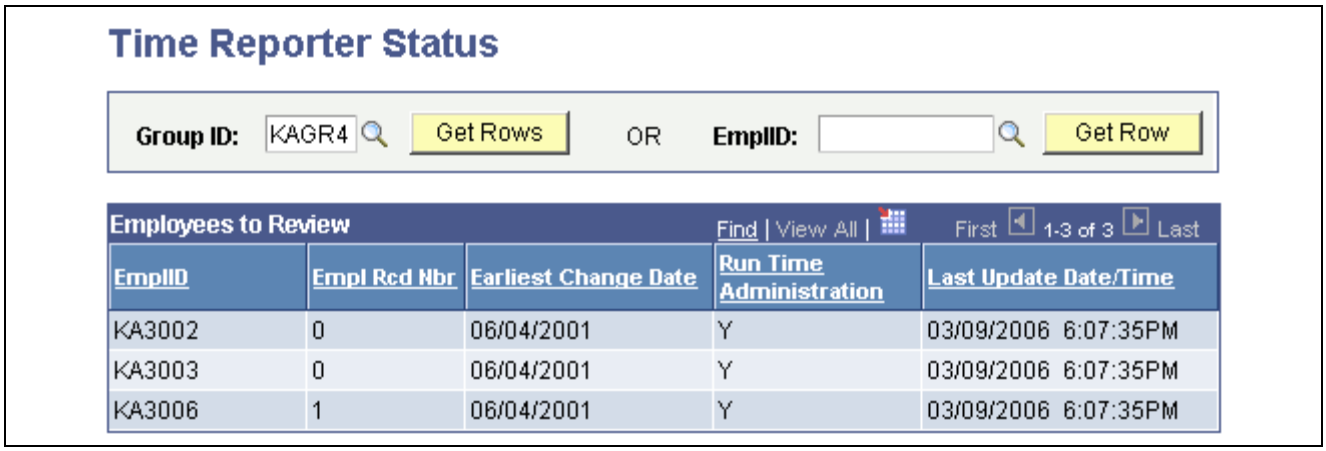
Chapter 10, "Setting Up Time Reporters," Understanding Time Reporter Data, page 203

Page Used to View Time Reporter Status

Page Name	Object Name	Navigation	Usage
Time Reporter Status	TL_TR_STATUS	Time and Labor, View Time, Time Reporter 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 Time Reporter Status page.



Time Reporter 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.

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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

Chapter 10, "Setting Up Time Reporters," Understanding Time Reporter Data, page 203

Launching the Time Administration Process

This section explains how to launch the Time Administration process.

Understanding When the Process is Called

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.

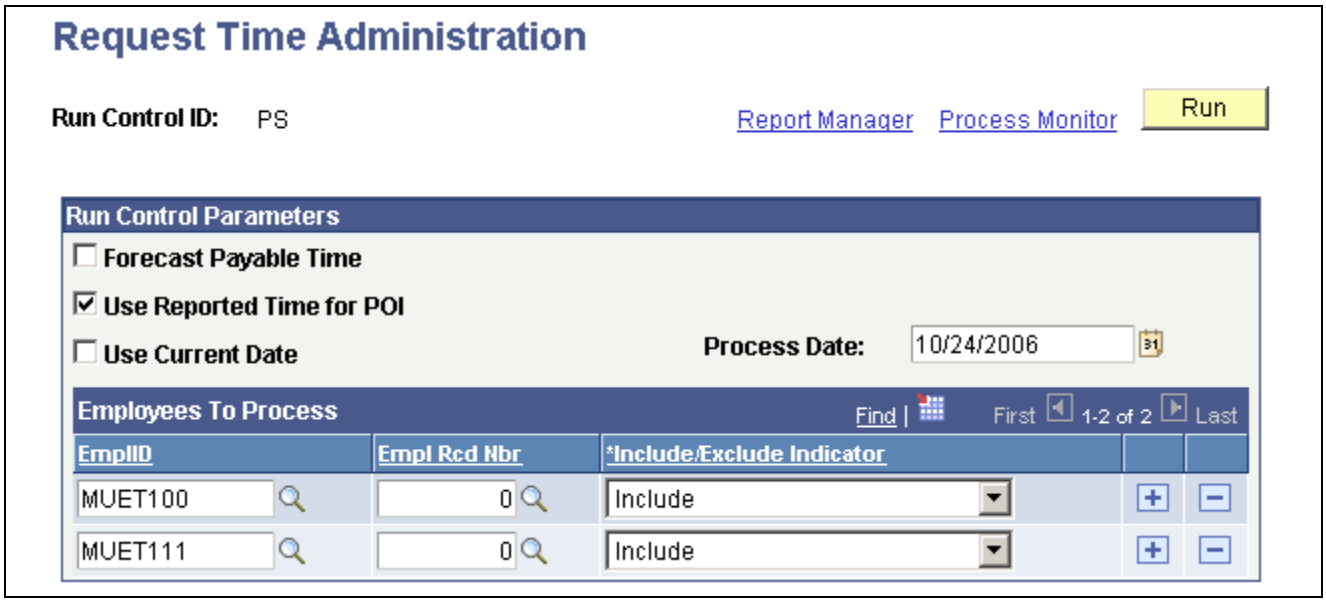
Page Used to Start the Time Administration Process

Page Name	Object Name	Navigation	Usage
Request Time Administration	TL_TA_RUNCTL	Time and Labor, Process Time, Request Time Administration, Request 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 Request Time Administration page.

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Request Time Administration 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.

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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 current date or system date. 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 Nbr Select the Employee Record Number for the time reporter's job that you want to include or exclude from the run.

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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

Chapter 13, "Understanding the Batch Process in Time Administration," Step 1: Determining Time Reporters to Process, page 329

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

Enterprise PeopleTools PeopleBook: Process Scheduler, Viewing the Status of Your Process

Generating and Viewing Runtime Statistics

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 archived batch data.
- View archived batch details.
- View archived rule maps.

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- View the archived rule maps details.

Understanding 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.

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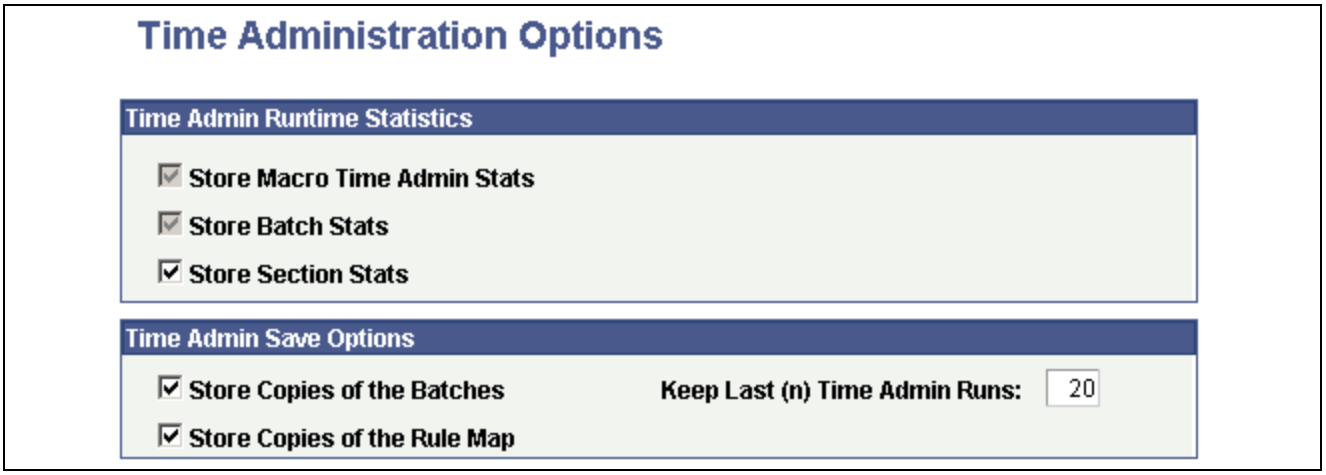
Pages Used to Generate and View Runtime Statistics

Page Name	Object Name	Navigation	Usage
Time Admininistration Options	TL_TA_OPTIONS	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Time Administration Options, Time Admininistration 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.
Time Administration Statistics	TL_TA_RSL_MAINT	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Time Administration Statistics, Time Administration Statistics	View the macro runtime statistics for the Time Administration process.
TA Run-Time Stats: Batches	TL_TA_RSL_BATCH	Click the Batch Stats link on the Time Administration Statistics page.	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 Administration Options page must be selected. Statistics are generated when you run the Time Administration process.
TA Run-Time Stats: AE Sections	TL_TA_RSL_SECT	Click the AE Section Stats link on the Time Administration Statistics page.	View the Application Engine statistics.
Archived Batches	TL_TA_ARCH_BAT	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Archived Batches, Archived Batches	View archived batch data.
Archive Batch Detail	TL_TA_ARCH_BAT_SEC	Click View Details on the Archived Batches page.	View archived batch details.
Archived Rule Maps	TL_TA_ARCH_RMAP	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Archived Rule Maps, Archived Rule Maps	View archived rule maps.
Archive Rule Map Detail	TL_TA_ARCH_RMP_SEC	Click the View Details button on the Archive Rule Map page.	View the archived rule maps details.

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Selecting the Runtime Statistics and Date to Generate

Access the Time Administration Options page.



Time Administration 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.

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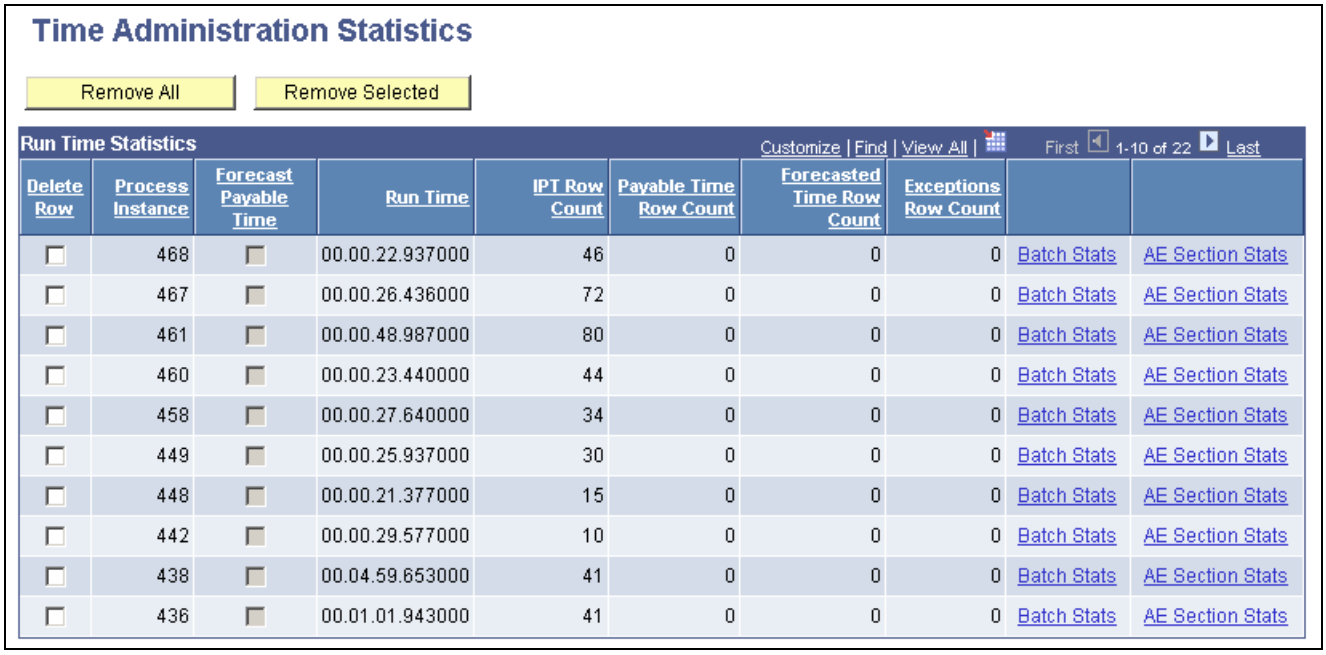
Store Copies of the Rule Map Select to store the Rule Map and see what rules you ran, the order in which they ran, and so forth.

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 Archived Rule Maps page.

Viewing Runtime Statistics

Access the Time Administration Statistics page.



Time Administration Statistics

Remove All | Remove Selected

Run Time Statistics — Customize | Find | View All | First 1-10 of 22 Last

Delete Row	Process Instance	Forecast Payable Time	Run Time	IPT Row Count	Payable Time Row Count	Forecasted Time Row Count	Exceptions Row Count		
☐	468	☐	00.00.22.937000	46	0	0	0	Batch Stats	AE Section Stats
☐	467	☐	00.00.26.436000	72	0	0	0	Batch Stats	AE Section Stats
☐	461	☐	00.00.48.987000	80	0	0	0	Batch Stats	AE Section Stats
☐	460	☐	00.00.23.440000	44	0	0	0	Batch Stats	AE Section Stats
☐	458	☐	00.00.27.640000	34	0	0	0	Batch Stats	AE Section Stats
☐	449	☐	00.00.25.937000	30	0	0	0	Batch Stats	AE Section Stats
☐	448	☐	00.00.21.377000	15	0	0	0	Batch Stats	AE Section Stats
☐	442	☐	00.00.29.577000	10	0	0	0	Batch Stats	AE Section Stats
☐	438	☐	00.04.59.653000	41	0	0	0	Batch Stats	AE Section Stats
☐	436	☐	00.01.01.943000	41	0	0	0	Batch Stats	AE Section Stats

Time Administration Statistics 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.

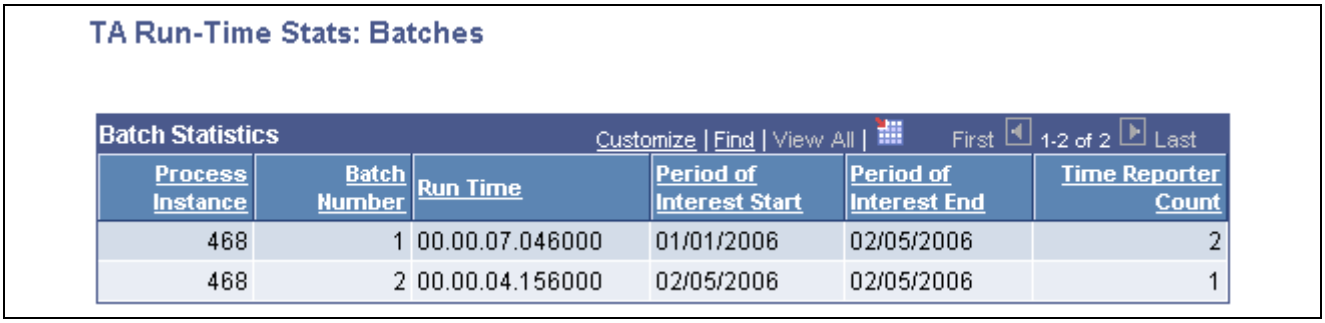
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Remove All Click this button to delete all statistics that appear on this page and the linked Batch Stats page and AE Section Stats page.

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 TA Run-Time Stats: Batches page.


TA Run-Time Stats: Batches

TA Run-Time Stats: Batches page

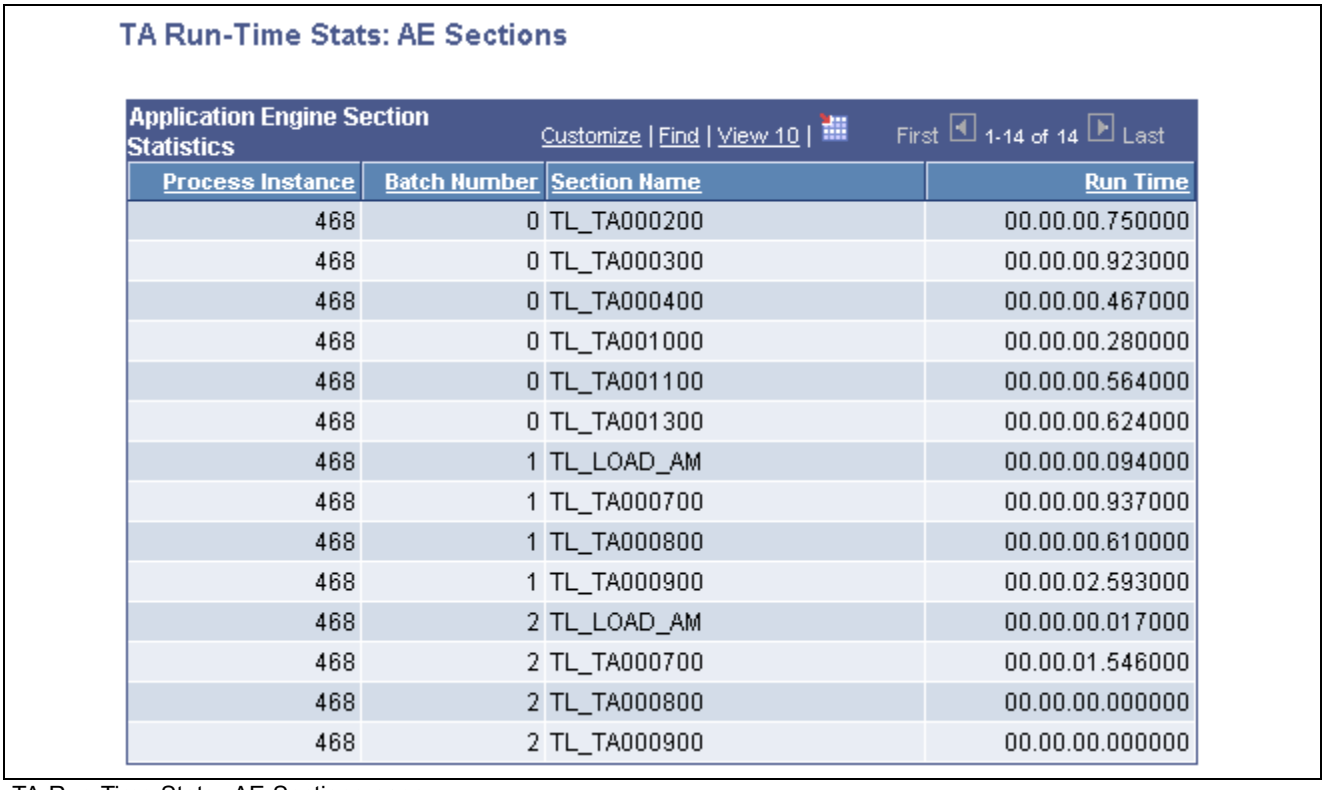
Batch Statistics — Customize | Find | View All | First 1-2 of 2 Last

Process Instance	Batch Number	Run Time	Period of Interest Start	Period of Interest End	Time Reporter Count
468	1	00.00.07.046000	01/01/2006	02/05/2006	2
468	2	00.00.04.156000	02/05/2006	02/05/2006	1

Time Reporter Count This is the number of time reporters processed in the batch.

Viewing Application Engine Statistics

Access the TA Run-Time Stats: AE Sections page.


TA Run-Time Stats: AE Sections

TA Run-Time Stats: AE Sections page

Application Engine Section Statistics — Customize | Find | View 10 | First 1-14 of 14 Last

Process Instance	Batch Number	Section Name	Run Time
468	0	TL_TA000200	00.00.00.750000
468	0	TL_TA000300	00.00.00.923000
468	0	TL_TA000400	00.00.00.467000
468	0	TL_TA001000	00.00.00.280000
468	0	TL_TA001100	00.00.00.564000
468	0	TL_TA001300	00.00.00.624000
468	1	TL_LOAD_AM	00.00.00.094000
468	1	TL_TA000700	00.00.00.937000
468	1	TL_TA000800	00.00.00.610000
468	1	TL_TA000900	00.00.02.593000
468	2	TL_LOAD_AM	00.00.00.017000
468	2	TL_TA000700	00.00.01.546000
468	2	TL_TA000800	00.00.00.000000
468	2	TL_TA000900	00.00.00.000000

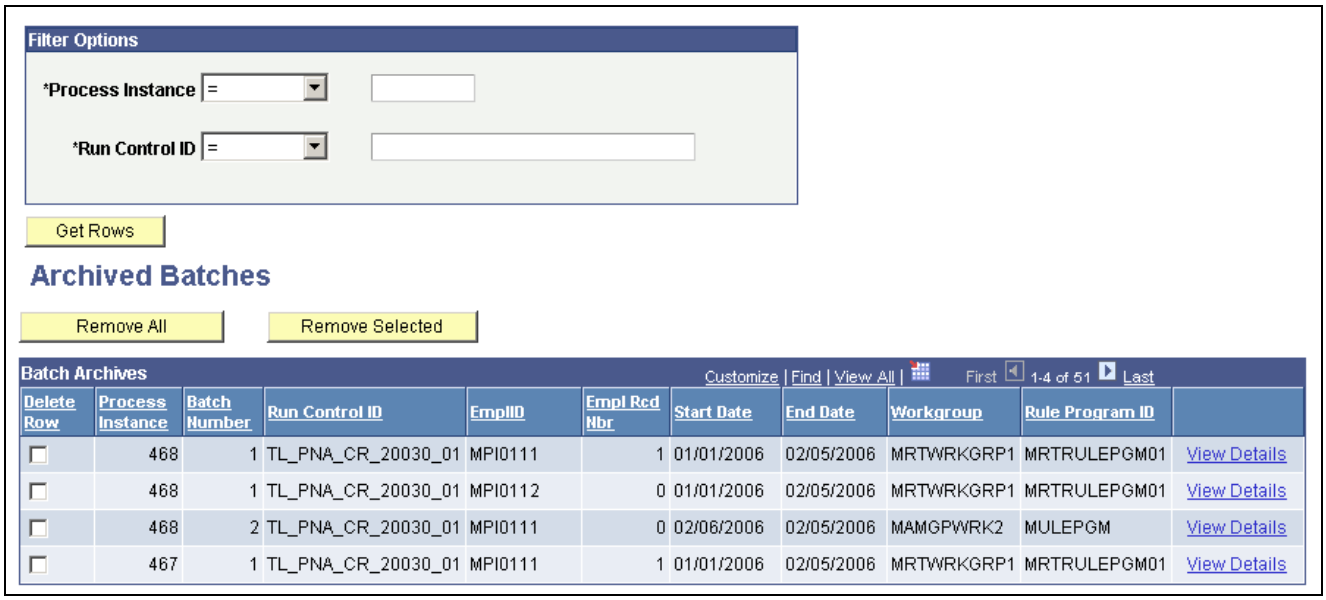
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Process Instance The order assigned to the run in the processing queue. The number is generated automatically by the Process Scheduler.

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 Archived Batches page.



Archived Batches page

You can view detailed information about the batches processed during a Time Administration run through the Archived Batches page and the linked Archive Batch Details page.

Filter Options

Process Instance Select appropriate search logic and enter the process information to filter by this variable.

Run Control ID Select appropriate search logic and enter the run control ID information to filter by this variable.

Get Rows Click this button to populate the grid based on filtering criteria, if entered, or for all batches, if no filtering criteria is entered.

Batch Archives

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.

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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 Archive Batch Detail page.



Archive Batch Detail page

Many of the fields on the Archive Batch Details page also appear on the Archive Batch Detail page. Additional fields include:

Empl Effdt (employee effective date) The date on which the time reporter was enrolled in 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.

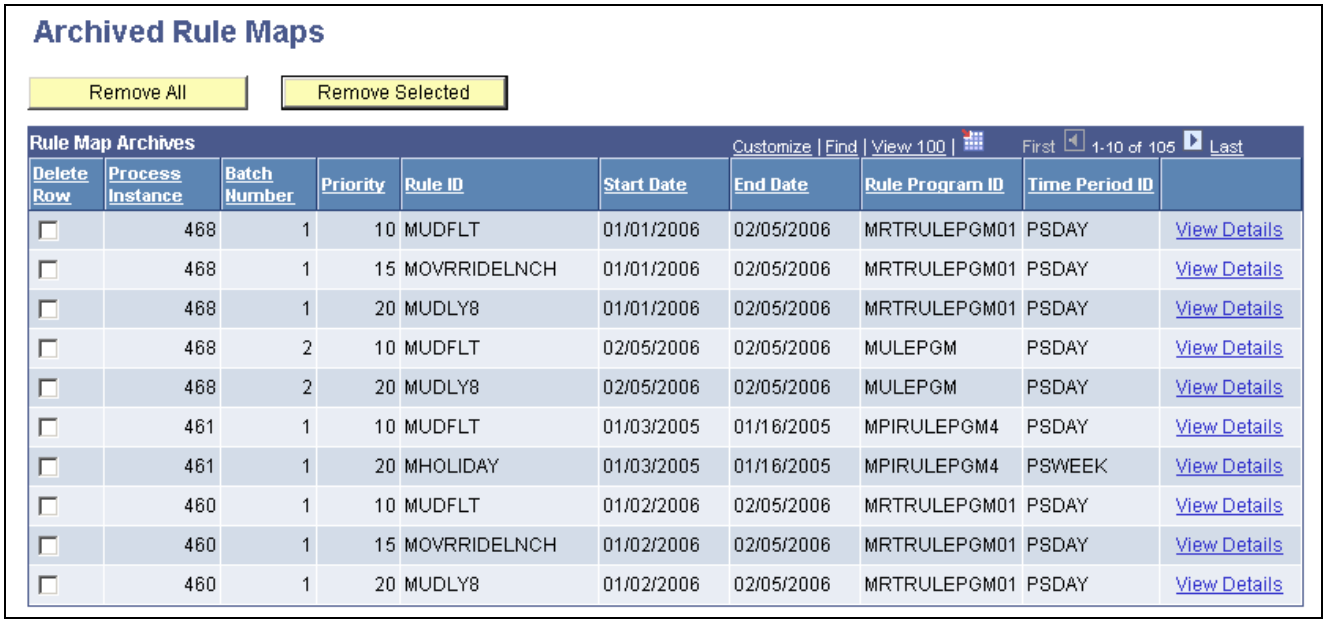
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Wrkgrp Effdt (workgroup effective date) The effective date of the workgroup row that was effective for this run and for this time reporter.

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 Archived Rule Maps

Access the Archived Rule Maps page.



Archived Rule Maps

Remove All | Remove Selected

Rule Map Archives — Customize | Find | View 100 | First 1-10 of 105 Last

Delete Row	Process Instance	Batch Number	Priority	Rule ID	Start Date	End Date	Rule Program ID	Time Period ID	
☐	468	1	10	MUDFLT	01/01/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details
☐	468	1	15	MOVRRIDELNCH	01/01/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details
☐	468	1	20	MUDLY8	01/01/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details
☐	468	2	10	MUDFLT	02/05/2006	02/05/2006	MULEPGM	PSDAY	View Details
☐	468	2	20	MUDLY8	02/05/2006	02/05/2006	MULEPGM	PSDAY	View Details
☐	461	1	10	MUDFLT	01/03/2005	01/16/2005	MPIRULEPGM4	PSDAY	View Details
☐	461	1	20	MHOLIDAY	01/03/2005	01/16/2005	MPIRULEPGM4	PSWEEK	View Details
☐	460	1	10	MUDFLT	01/02/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details
☐	460	1	15	MOVRRIDELNCH	01/02/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details
☐	460	1	20	MUDLY8	01/02/2006	02/05/2006	MRTRULEPGM01	PSDAY	View Details

Archived Rule Maps page

You can view detailed information about the rules processed during a Time Administration run through the Archived Rule Maps page and the linked Archive Rule Map Detail 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.

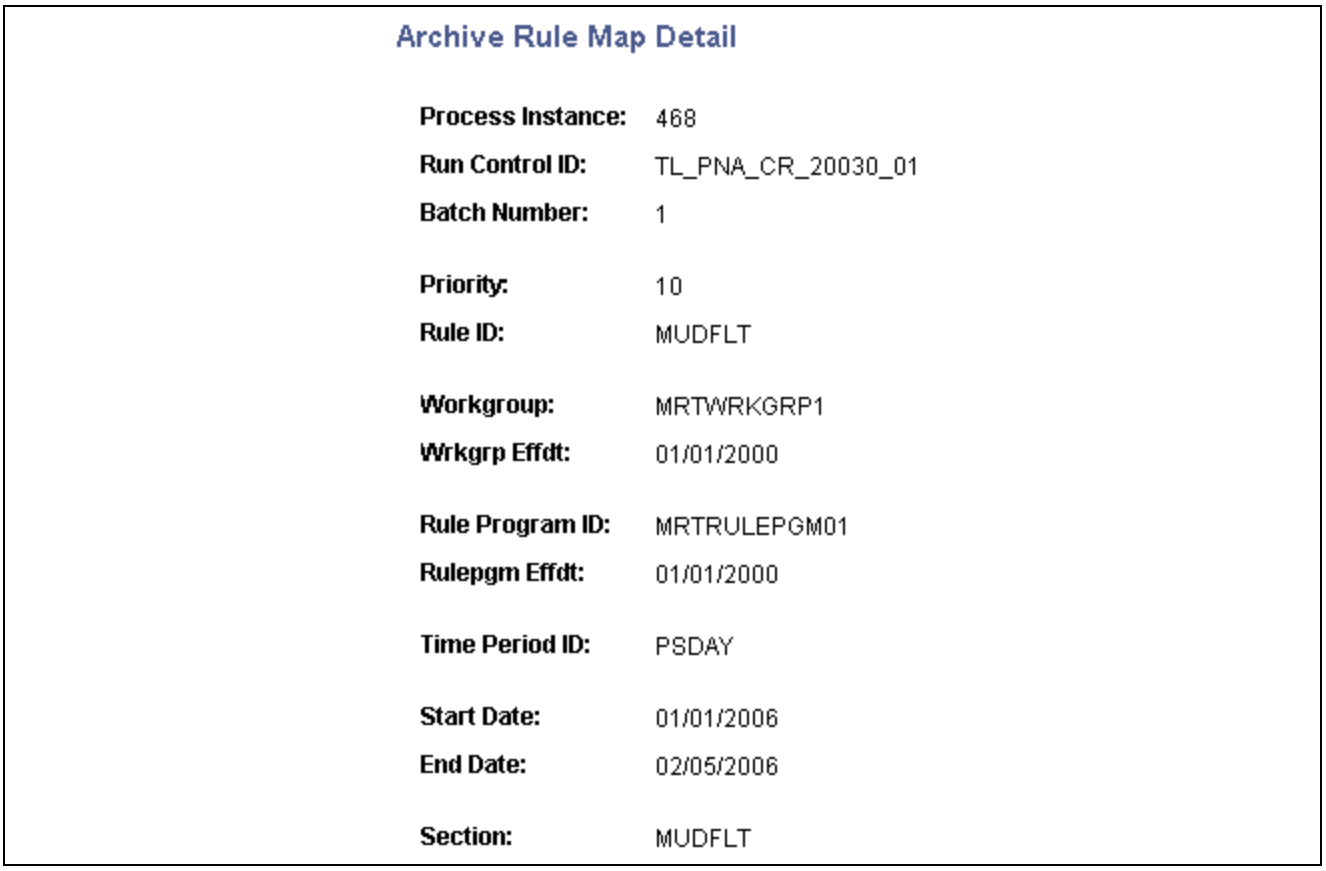
Remove All Click this button to delete all statistics that appear on this page and the linked detail page.

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.

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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.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

Using Batch Processing Tips

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?

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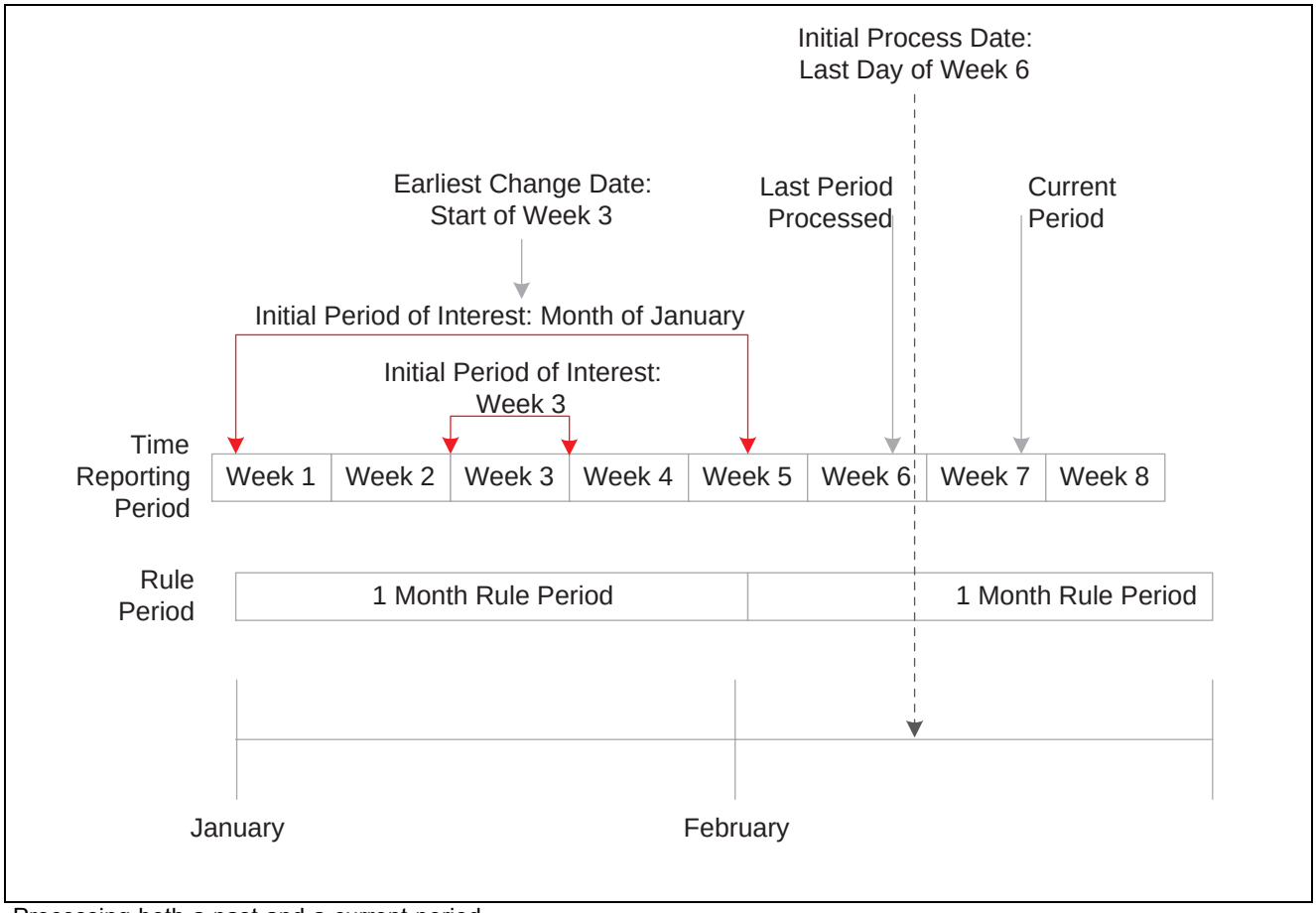
A. Because Payable Time cannot be created for a date or a period that is not contained within the period of interest (and which is therefore not included in Intermediate Payable Time), the current period may need to be processed in a separate run from the prior period adjustment. The following example illustrates why this might occur, and how to avoid skipping a period when you run Time Administration.

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.

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.

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- 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 January 1 and ends on January 31. Because there is no positively reported time for periods after January 31, 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. 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

Chapter 13, "Understanding the Batch Process in Time Administration," Using Time Reporter Status in the Selection Process, page 330

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CHAPTER 14

Understanding Payable Time

This chapter provides an overview of the stages through which payable time passes and the effect of adjustments on payable time, and discusses how to:

- Publish actual and estimated payable time.
- Understand payable time fields.
- Generate a payable status report.

Understanding Payable Time

Payable time is created through the Time Administration process and is the end product of 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 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 Project Costing for use in project planning, budgeting, billing, and other activities.

See Also

Chapter 18, "Integrating with Payroll Applications," page 501

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," page 527

Payable Time Attributes

Four attributes determine when payable time is available to other applications and how the Time Administration process handles adjustments to payable time. These attributes are:

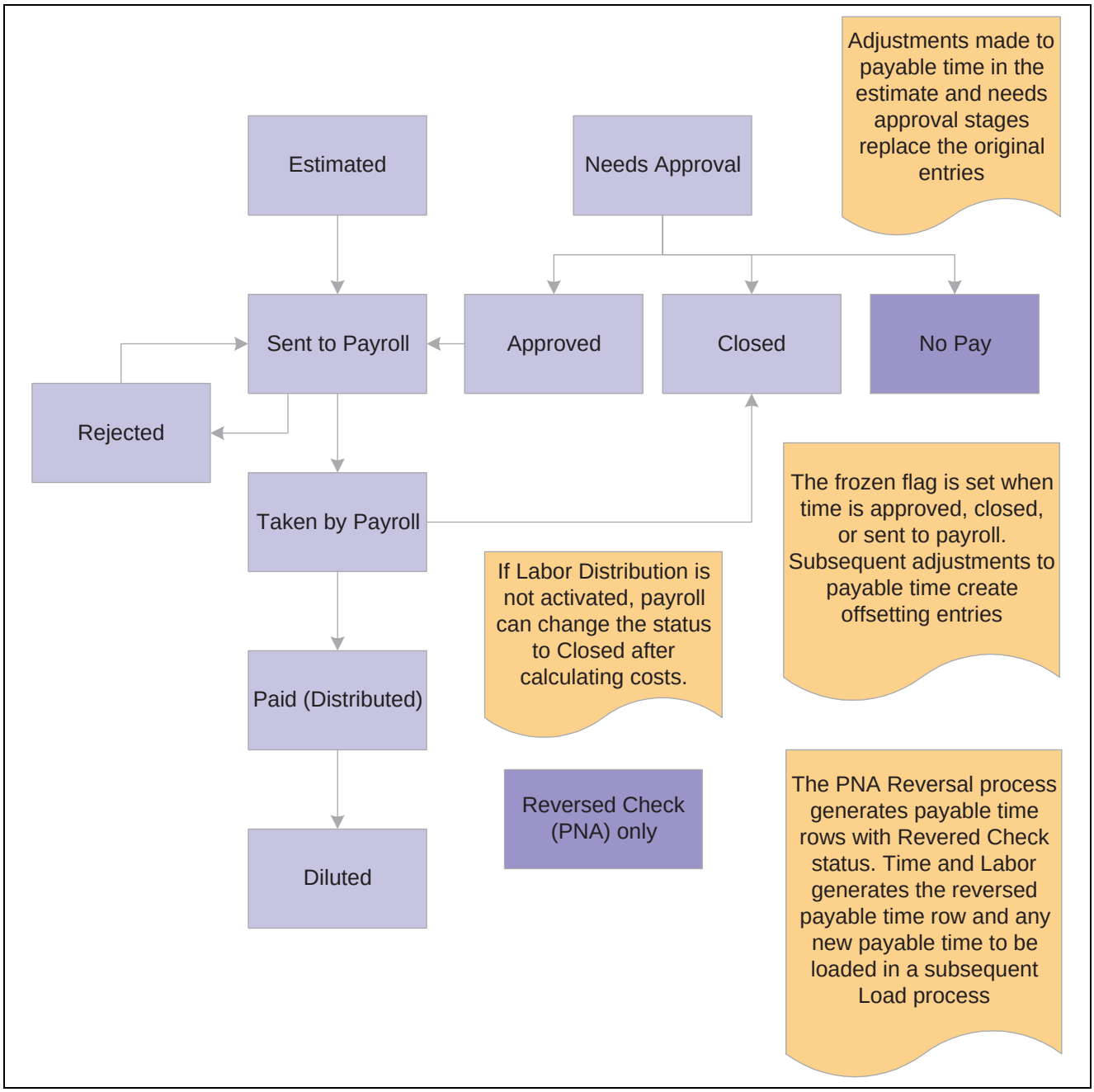
- *Payable status.* Payable time goes through many stages, most of which relate to the transmission of payable time records from Time and Labor to your payroll system, as well as the transmission of cost data from your payroll system to Time and Labor. Payable status records the progress of payable time through these stages.
- *Reason code.*A reason code is associated with a payable time status code to better align and track payable time from Time and Labor with what actually is paid by the payroll system.

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- *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, reason code, 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 four attributes reside in the payable time tables.

The following diagram shows each stage of payable time:



Stages of payable time

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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 Status and Reason Codes

The following table lists and describes all of the payable time statuses and reason codes and indicates when they are published.

Status Codes	Description	Reason Codes	When Published?
Estimated (ES)	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 Time and Labor 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.	No reason code is associated with this status.	Published to systems that subscribe to the Estimates message.
Online Estimate (OE)	This is estimated payable time that was created by launching the online rules process from the Timesheet page. Online Estimate is only displayed when you click the Apply Rules button on the elapsed or punch Timesheet page. Once Time Administration is run, the status changes to Estimated or Needs Approval.	No reason code is associated with this status.	Not applicable.

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Status Codes	Description	Reason Codes	When Published?
Needs Approval (NA)	If the workgroup or TRC is set up to require approval of payable time, the Time Administration process sets this status. It is similar to Estimated 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.	No reason code is associated with this status.	Published to systems that subscribe to the Estimates message.
Approved − Goes to Payroll (AP)	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..	No reason code is associated with this status.	Not applicable.

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Status Codes	Description	Reason Codes	When Published?
Closed (CL)	When payable time reaches the closed stage, the system turns on the frozen indicator. Payable status is set to this status when any of the following conditions are met: • The Send Time to Payroll check box is selected on the Maintain Time Reporter Data page. • The status of the TRC is not*Active* . • The workgroup or TRC does not need approval and the Publish unmapped TRC as No Pay check box on the TL Installation page is not selected. • 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.) When the workgroup or TRC is set up to require approval of payable time, then the approval process sets this status. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Closed.	These reason codes can be associated with the Closed status: • Not Sent to Payroll (NSP) – Time and Labor sets this reason code when payable status changes to Closed. • Not Distributed (NDS) – When the payroll system (GP or PNA) successfully processes time, and the pay system is not configured for the Time and Labor Distribution process, payroll sets the payable status code to Closed and the reason code to Not Distributed. • Record Adjustment (RAJ) – Time and Labor sets the payable status to Closed and the reason code to record adjustment (RAJ) when paid time is adjusted in Time and Labor.	Published to systems that subscribe to the Actual message.

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Status Codes	Description	Reason Codes	When Published?
Sent to Payroll (SP)	When payable time is selected, the payroll system sets this status code (either GP or PNA). Payable time has this status when it is sent to payroll and payroll either takes or rejects the entry. When payable time reaches this 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 this status.	No reason code is associated with this status.	Not applicable.

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Status Codes	Description	Reason Codes	When Published?
Rejected by Payroll (RP)	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. The Set Ignore Status for Not Ok to Pay check box on the TL Installation page defines which payable code and reason codes Time and Labor sets during the Distribution Dilution process for PNA integration when a no pay other earning or pay earning are processed: If the Set Ignore Status for Not Ok to Pay check box is selected, then Time and Labor sets the payable time status code to Ignore (IG) and the reason code to Manual Reject If the Set Ignore Status for Not Ok to Pay check box is *not* selected, then Time and Labor sets the payable status code to Rejected by Payroll (RP) and the reason code to Payroll Not Processed (PNP). Note: The default setting for this check box is selected.	These reason codes can be associated with this status: • Manual Reject (MRJ) – • Payroll Not Processed (PNP) – The payroll system sets the payable time status to Rejected by Payroll and the reason code to Payroll Not Processed for any payable time that is not processed by the payroll system (either GP or PNA) • Cancelled (CAN) – If a Global Payroll user cancels an entire Calendar Group run (pay run), Global Payroll sets the payable status code to Rejected by Payroll and the reason code to Cancelled. .PNA sets related rows of payable time to Rejected by Payroll and the reason code to Cancelled when a payrun is unsheeted. .	Not applicable.
Taken - Used by Payroll (TP)	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.	No reason code is associated with this status. When payable time is taken by the payroll system (GP or PNA) the payroll system sets this status code and removes any associated reason code (sets to blank).	Not applicable.

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Status Codes	Description	Reason Codes	When Published?
Distributed (PD)	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.	A reason code may be set or removed, depending on the payroll system: • Prior Period Salary Adjustment (PPS) – When PNA selects prior period time for a salaried employee, it sets this status and reason code. • Global Payroll sets this status and removes any associated reason code (sets to blank) on a new row for a prior period adjustment.	Published to systems that subscribe to the Actual message.
Diluted (DL)	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.	Refer to the previous row for the Distributed payable time status. The same reason codes apply to the Diluted status.	Published to systems that subscribe to the Actual message.

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Status Codes	Description	Reason Codes	When Published?
No Pay (NP)	Used by the Project Costing application only. The No Pay status is a status used to reflect transaction rows that are not going to payroll but are in a closed state. When payable time reaches the closed stage, the system turns on the frozen indicator. Payable status is set to this status when any of the following conditions are met: • The Send Time to Payroll check box is cleared on the Maintain Time Reporter Data page. • The status of the TRC is not*Active* . • Time is approved and the Publish unmapped TRC as No Pay check box on the TL Installation page is selected.	Not Sent to Payroll (NSP) – Time and Labor sets this status and reason code when the TRC is not mapped to an earnings code. This reason code differentiates payable time that is closed without being sent to payroll (suspended) and payable time that is closed because it is sent to payroll.	In order for a No Pay status to be populated and published to PeopleSoft Project Costing the following conditions must be met: 1. The Publish unmapped TRC as No Pay check box is selected on the Time and Labor Installation page. 2. The Maintain Time Reporter Data - Send to Payroll check box is selected. 3. The related TRC is not associated with an earnings code.

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Status Codes	Description	Reason Codes	When Published?
Ignore (IG)	When a Time and Labor user indicates on the Adjust Paid Time page that rows that have been rejected by the payroll system should not be paid, Time and Labor sets this payable status. The Set Ignore Status for Not Ok to Pay check box on the TL Installation page defines the payable time status code and reason codes that Time and Labor sets during the Distribution Dilution process when a no pay other earning or pay earning are processed: If the check box is selected, then Time and Labor sets this payable status. Payable time rows with this status are never pulled by Global Payroll.	Manual Reject (MJR) – Time and Labor associates this reason code to rows when it changes the status to Ignore. Not Used (NUS) – Global Payroll adds this reason code to payable time with this status.	Denotes offset rows that should be ignored by Global Payroll.
Reversed Check (RV)	This status code exists to handle check reversals in PNA. The PNA Reversal process generates payable time rows with this status. Time and Labor generates the reversed payable time row and any new payable time to be loaded in a subsequent Load process. This process occurs after PNA has successfully completed the Confirm Pay process. **Note.** If the process ends abnormally, you must restart the process from the Process Monitor.	The reason code that is associated with the Reversed Check status is always Reversed (CRV).	

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See Also

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Integrating with Project Costing, page 530

Chapter 13, "Understanding the Batch Process in Time Administration," Step 14: Processing Adjustments, page 362

Summary of System Settings that Determine Payable Time Status

This table summarized the settings that are made on various pages in Time and Labor that determine the payable time status:

Workgroup Approval See Chapter 5, "Establishing Workgroups," Setting Up Workgroups, page 77.	**TRC Approval** See Chapter 6, "Establishing Time Reporting Codes," page 101.	**Leave Modified**	**Send time to Payroll on TR Data** See Chapter 10, "Setting Up Time Reporters," page 203.	**Send to Payroll on TRC** See Chapter 6, "Establishing Time Reporting Codes," Defining and Mapping Time Reporting Codes (TRCs), page 103.	**Publish unmapped TRC as No Pay**	**Payable Time Status**
Yes	No	No	No	No	Yes/No	NA
No	Yes	No	No	No	Yes/No	NA
Yes	Yes	No	No	No	Yes/No	NA
No	No	Yes	No	No	Yes/No	NA
Yes	Yes	Yes	No	No	Yes/No	NA
No	No	No	Yes	Yes	Yes/No	ES
No	No	No	No	Yes	Yes/No	CL
No	No	No	No	No	Yes/No	CL
No	No	No	Yes	No	Yes	NP
No	No	No	Yes	No	No	CL

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Publishing Estimated and Actual Payable Time

This section discusses 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 Time and Labor 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 Estimated or Needs Approval.

Estimated payable time is available to any system that wants an early estimate of costs. Time and Labor publishes, on request, all payable time that has not had actual costs applied, including payable time with a status of Estimated, Needs Approval, Approved, Sent to Payroll, Rejected by Payroll, and Taken by Payroll. It does not include payable time in a Closed, Diluted, or Distributed statuses.

Receiving systems should replace any previously collected estimates with the data from Time and Labor and not try to reconcile old and new estimates. Whatever comes from 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

Chapter 18, "Integrating with Payroll Applications," page 501

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," page 527

Publishing Payable Time with Actual Costs

If you integrate 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. Time and Labor automatically publishes payable time with these statuses 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 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 Project Costing.

Currency Codes in the Payable Time Table

The Payable Time Table (TL_PAYABLE_TIME), includes two fields for currency codes: Currency Code and Currency Code 2.

- Currency Code 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 has a 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.

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See Also

Chapter 18, “Integrating with Payroll Applications,” page 501

Chapter 19, “Integrating with PeopleSoft Financials and Enterprise Performance Management,” page 527

Understanding Payable Time Fields

This 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.
Initial_Seq_Nbr	Initial sequence number. Used for PNA check reversal integration. Has a value equal to the Seq_Nbr field value when a check is reversed.
Task_Prfl_Tmplt_ID	Task template for task elements.
TRC	Time reporting code for this time.
TL_Quantity	Hours, amount, or units reported by elapsed time reporters. This field is calculated for punch time reporters.
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.

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Field Name	Description
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.
TL_Pybl_Reason_Cd	Payable reason code.
TL_Rule_ID	Rule ID. Indicates which rule has created the time. This field is populated only if a rule has created the 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.

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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)
Rt_Source	Reported time source.
Orig_Seq_Nbr	The original sequence number, if this is an offset.
Company	Company code.
Business_Unit_PC	Project Costing 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.

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Field Name	Description
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	Performance Management business unit.
SetID_Dept	Department set ID.
SetID_Resource	Resource set ID.
SetID_Activity	Activity set ID.
Deptid_CF	Department ID ChartField.
Account	Account code.
Fund Code	Fund code.
Program Code	Program code.
Class Field	Class field.
Affiliate	Affiliate field.
Operating Unit	Operating unit field.
Alt Account	Alternate account code.
Budget Ref	Budget reference field.

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Field Name	Description
Chartfield 1, Chartfield 2, Chartfield 3	ChartField codes.
Affiliate Intra1, Affiliate Intra2	Affiliate Intra1 and Affiliate Intra2 fields.

Generating a Payable Status Report

You can generate a Payable Status report that shows the payable status for each entry of payable time for the EmplID or Group IDs that you specify 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.

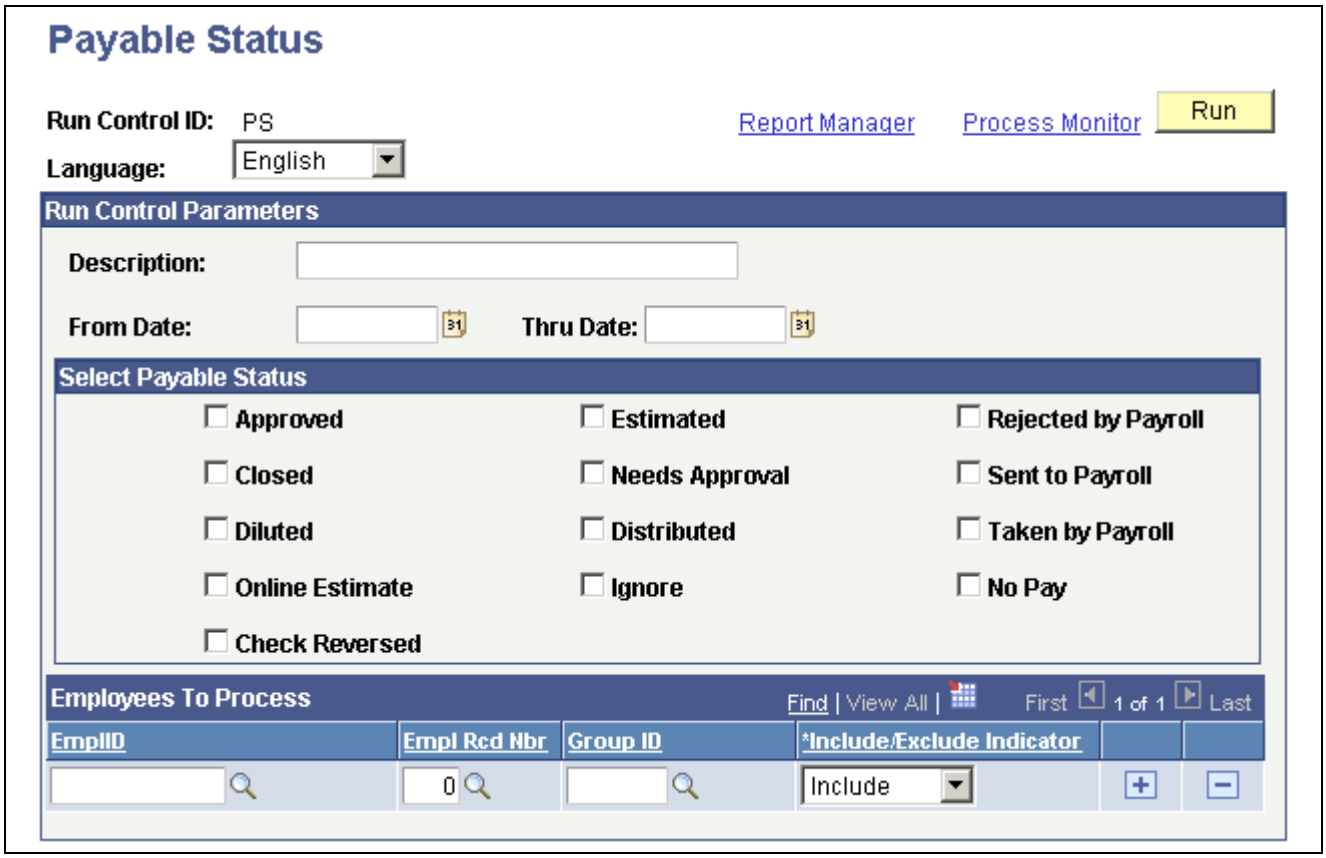
Page Used To Generate a Payable Status Report

Page Name	Object Name	Navigation	Usage
Payable Status	TL_RUNCTL_TL001	Time and Labor, Reports, Payable Status, 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.

Generating a Payable Status Report

Access the Payable Status page.

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Payable Status page

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 Project Costing. 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.

Online Estimate Payable Time is in this temporary status when online rules are triggered from the Timesheet pages.

Reversed Check Payable time with this status results from check reversals in Payroll for North America. The Reversal process in Payroll for North America generates payable time rows and sets the payable time status code to Reversed. Time and

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	Labor generates the reversed payable time row and any new payable time to be loaded in a subsequent Load process.
Estimated	Payable Time in this status is not in a frozen state and can be updated by the Time Administration process. This Payable Time can be selected by other financial systems as estimated costs.
Needs Approval	Payable Time in this status is not in a frozen state and can be updated by the Time Administration process. This time can be selected by other financial systems as estimated costs. This time requires approval either through online or batch process in Time and Labor.
Distributed	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.
Ignore	Payable Time is in this status when Global Payroll ignores offset rows in processing.
Rejected by Payroll	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.
No Pay	Payable Time is in this status when transaction rows are not going to payroll but are in a closed state. Used by the Project Costing application only.

Note. From a troubleshooting perspective, after your pay period has passed, check to see whether you have payable time that remains in a *Rejected by Payroll, Sent to Payroll*or *Taken by Payroll* status. This payable time review is necessary to determine what is causing the time to remain in this state.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

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CHAPTER 15

Reporting Time

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

- Create time reporting templates.
- Create templates for rapid time reporting.
- Report time rapidly.

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. Time and Labor can also generate time automatically through the use of schedules.

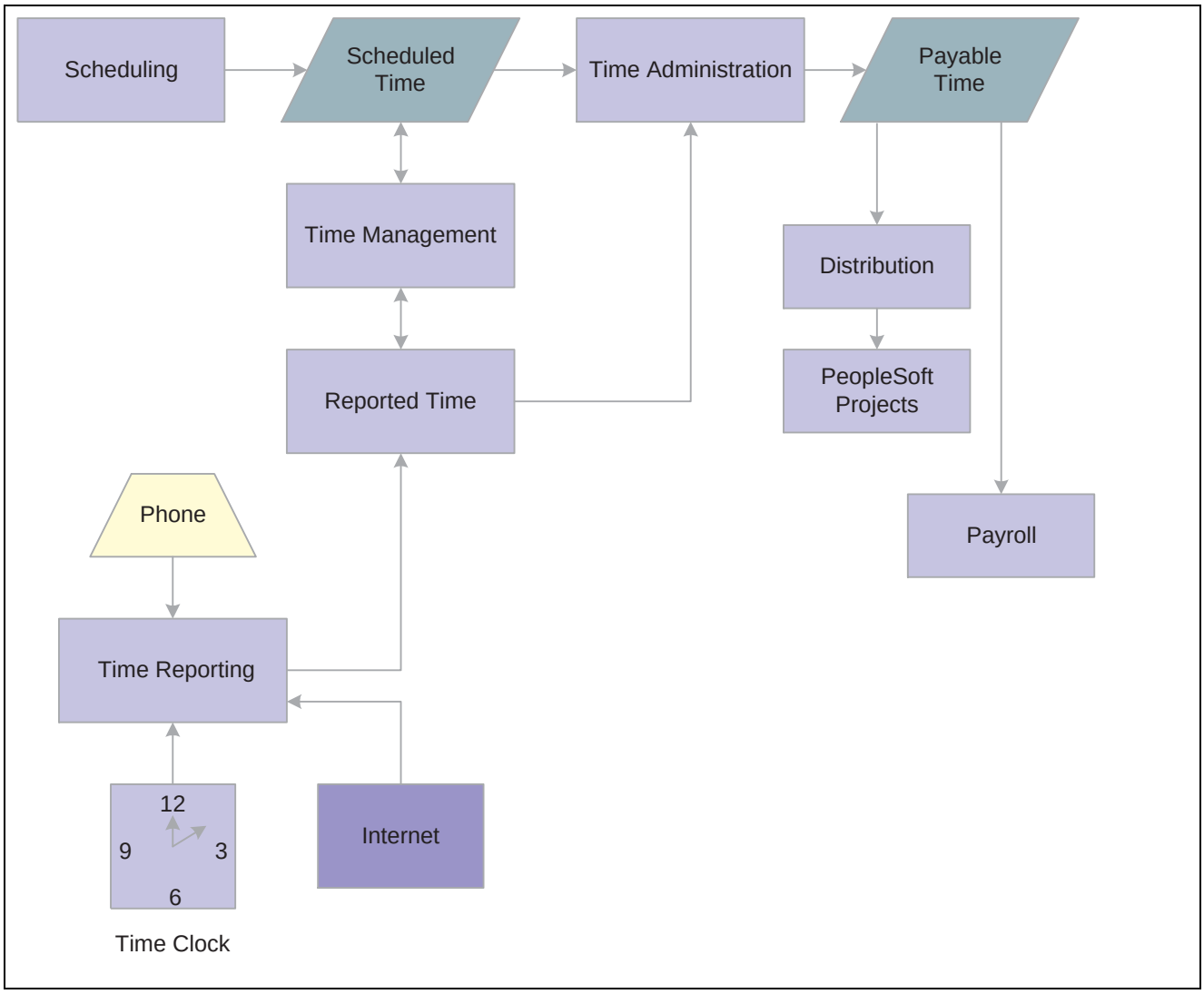
Note. If your organization uses PeopleSoft Expenses along with PeopleSoft Mobile Time and Expense, time reporters can enter time while out of the office and upload it to Expenses, which can send the reported time to Time and Labor.

You can also view and modify all time entries—regardless of their source—using the 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, Project Costing, and other applications.

The graphic shows how reported time is converted to payable time for use by other applications:

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Converting reported time to payable time for use by other applications

See Also

Chapter 19, “Integrating with PeopleSoft Financials and Enterprise Performance Management,” Integrating with PeopleSoft Expenses and Mobile Time and Expense, page 543

Creating Time Reporting Templates

Use time reporting templates to establish easy-to-use, self-service pages that time reporters can use to enter time for the current period.

This section provides an overview of time reporting templates and discusses how to specify fields to display on the time entry pages.

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Understanding Time Reporting Templates

You design the time reporting pages. Use the Time Reporting Template page to select the fields to appear on the Timesheet, Web Clock, and Mass Time self-service pages. You also indicate which data entry fields are required and which fields are optional.

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. The task template is associated with a Task Profile and/or a Task Group and then assigned to an employee.

Time Reporting Templates

You must assign a punch time reporting template and an 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.

Predefined Time Reporting Templates

If you want minimal information from time reporters, use the two predefined templates delivered with Time and Labor.

- Punch Template - No Options (PSPCH_NONE). You might want to assign this template to elapsed time reporters who never need to enter punch time. Users of this template only need to select the date they want to report time for and then enter their punch times or punch types on the time entry pages. The Taskgroup and Time Zone fields are defaulted in.
- Elapsed Template - No Options (PSELP_NONE). Users of this template select the date they want to report time for and enter a quantity. The time reporting code will default to REG if nothing is reported, and the Taskgroup and Billable Indicator fields are also defaulted in.

See Also

Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206

Chapter 7, "Defining Task Reporting Requirements," page 123

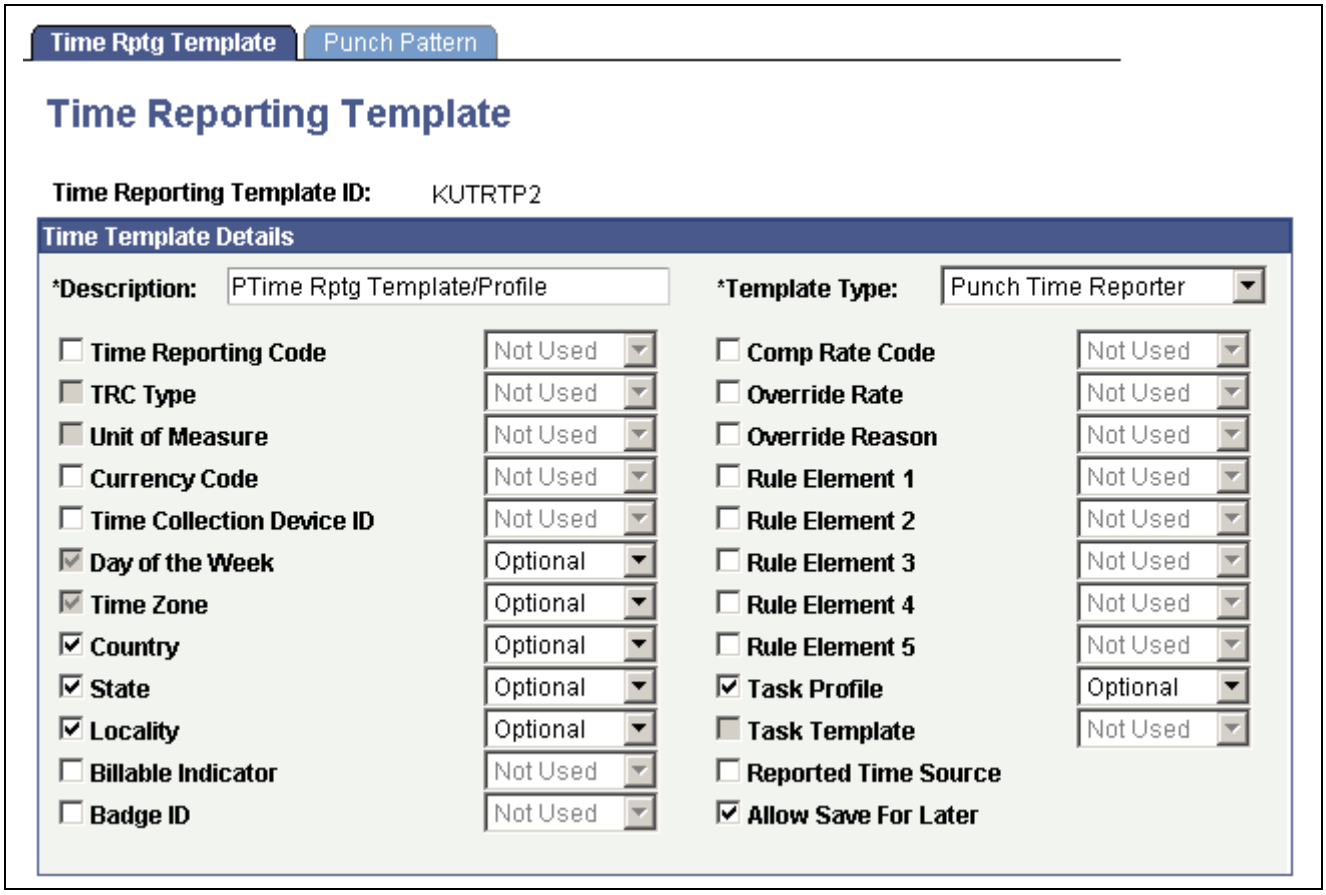
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Page Used to Create Time Reporting Templates

Page Name	Object Name	Navigation	Usage
Time Rptg Template	TL_RPTD_TMPLT1	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Time Reporting Template, Time Rptg Template	Specify time-related fields to display on the punch or elapsed time entry pages.
Punch Pattern	TL_RPTD_PUNCH	Set Up HRMS, Product Related, Time and Labor, Time Reporting, Time Reporting Template, Punch Pattern	Specify time reporting punch pattern defaults at a Time Reporting Template level for punch time entry pages.

Specifying Fields to Display on The Time Entry Pages

Access the Time Rptg 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 elapsed fields on the Timesheet and Mass Time pages. *Punch Time Reporter* causes the system to display default punch fields on the Timesheet and Web Clock pages.

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Selecting 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 for both Elapsed and Punch Time Reporter template types. When you select an *Elapsed Time Reporter* template type, this field defaults to checked and has the default value of *Optional.* This field is required to display on the time entry pages for an elapsed time reporter, but the time reporter is not necessarily required to enter a value in the field. Select this option if you want your time reporters to enter a TRC for the reported time on the Timesheet, Web Clock, or Mass Time entry pages.

TRC Type

This check box is available for both *Elapsed and Punch Time Reporter* template types and when the Time Reporting Code box is checked. Because this field is a display only field on the time entry pages, 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 Timesheet 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 for both *Elapsed and Punch Time Reporter* template types and when the Time Reporting Code check box is selected. Because this is a display only field on the time entry pages, the default value is *Optional.* Select this option if you want the system to display the unit of measure for the TRC on the Timesheet page when the TRC Type is units.

Currency Code

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 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 the Week

This box is automatically checked and available only when you select a *Punch Time Reporter* Template Type. The default value is *Optional.* This option will display the day of the week when the user enters a date on the Punch Time Entry page.

The day of the week automatically precedes the date on the Elapsed Time Entry page.

Time Zone

This check box is automatically checked and available only when you select a *Punch Time Report* Template Type. The default value is *Optional.* This option allows time reporters to report a time zone for the reported time on the Timesheet, Web Clock, and Mass Time pages.

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 time reporters to report a country for reported time on the Timesheet, Web Clock and Mass Time pages.

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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 time reporters to report a state for the reported time on the Timesheet, Web Clock or Mass Time pages. 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 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 time reporters to enter a locality. 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 for both *Elapsed Time Reporter* and *Punch Time Reporter* template types. The default value is *Required.* Select this option if you want time reporters to report a billable indicator on the Timesheet, Web Clock and Mass Time pages.

If Project Costing is integrated with Time and Labor, the reported value is passed to Project Costing.

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 for both *Elapsed Time Reporter* and *Punch Time Reporter* template types. The default value is *Required.* Select this check box if you want time reporters to be able to enter a compensation rate on the Timesheet, Web Clock and Mass Time pages.

Override Rate

This check box is available for both *Elapsed Time Reporter* and *Punch Time Reporter* Template Types. The default value is *Required.* Select this check box if you want time reporters to be able to enter an override rate on the Timesheet, Web Clock, and Mass Time pages. 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 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 time reporters to be able to enter an override reason code on the Timesheet, Web Clock, and Mass Time pages.

You define override reason codes on the Override Reason Code page.

Rule Element 1-5

These check boxes are available for both *Elapsed Time Reporter* and *Punch Time Reporter* template types. The default value is *Required.* Select these check boxes to enable 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.

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Task Profile This check box is available only if the Task Template check box is cleared. The default value is *Required,* which causes Task Profile options to appear on the Timesheet, Web Clock, and Mass Time pages.

The task profiles that appear in the drop-down list box are determined by the time reporter's taskgroup. If a taskgroup was 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 that the system should associate with the reported time. They eliminate the need for the time reporter to enter values for the individual task elements.

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 Timesheet, Web Clock, or Mass Time pages to display a field for each of the task elements you selected when creating the task template that is assigned to the time reporter's taskgroup. The Timesheet page displays a tab called Overrides that will contain all the appropriate task elements.

Allow Save For Later This option adds a Save For Later button that displays on the Timesheet page for both the employee and manager. The button allows the user to save reported time to the database without submitting it. The saved data will never be picked up and processed by Time Administration, but will remain in a holding state in the database until it is submitted. For example, if an employee typically submits their time on a weekly basis, they can go in and enter their time each day and click on the Save for Later button. Then at the end of the week they can submit the for processing. With the save button, the user has the option of checking for errors or saving the time without checking for errors. The Allow Save For Later check box is selected by default.

Reported Time Source This option displays the source of the reported time, such as Time Administration, Absence Management, Schedule source, or Time Collection Device.

Note. Punch Timesheet display of time reporting and task values are driven by use of Punch Time Reporting Template.

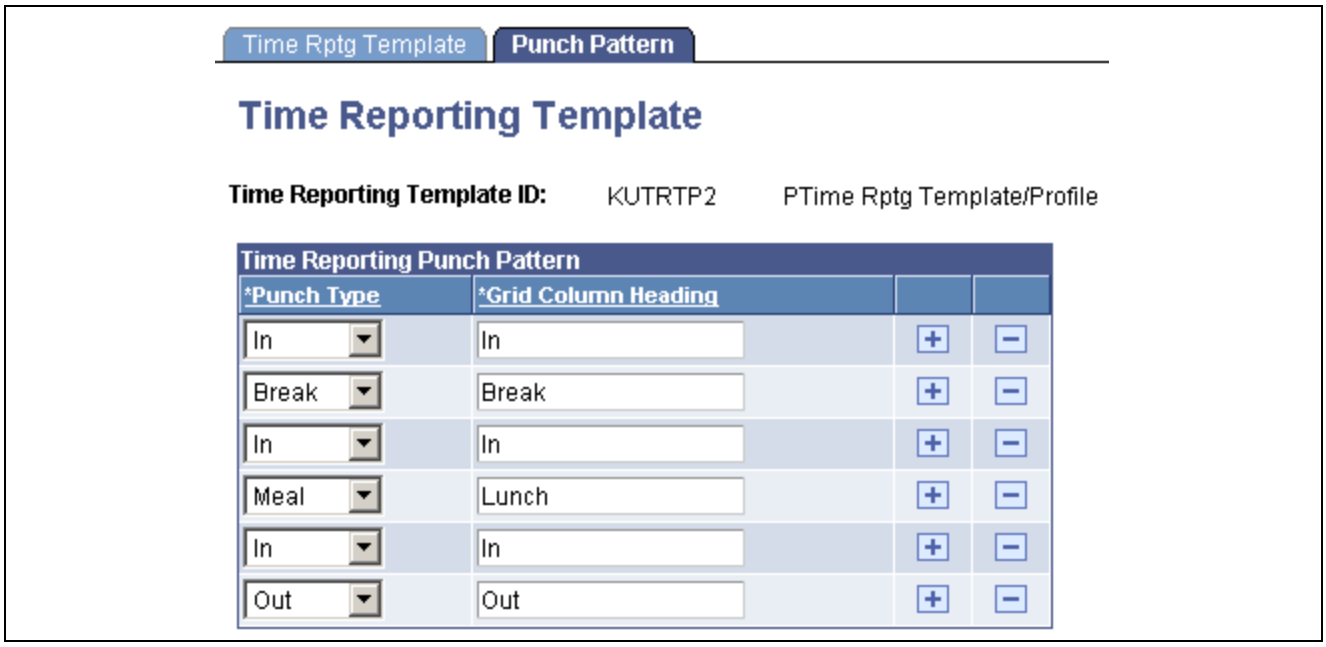
Elapsed Timesheet display of time reporting and task values are driven by use of Elapsed Time Reporting Template.

In order to derive the display of time reporting template information, the system looks for a time reporting template first on the Maintain Time Reporter Data page. If one is not there, then the system uses the time reporting template of the default taskgroup on the time reporter's Maintain Time Reporter Data page.

Time Reporting Punch Pattern

Access the Punch Pattern page.

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Punch Pattern page

Warning! Be careful to create a punch pattern that makes sense, without the same punch type in a row.

This page allows users to set up the typical punch type pattern for employees assigned to this Time Reporting Template. For example, you may have a group of employees assigned to a time reporting template that just has an In, Meal, In, and Out punch pattern. For another group of employees you can set up a different time reporting template that includes Break punch types. No reported tasks or time reporting information are associated to an *Out* punch.

All reported task or time reporting information is associated to the prior punch. For example:

Punch Type	Time	TRC	Punch Duration
In	8 AM	REG	
Break	10 AM	BRK	2 hours for REG from In to Break.
In	10:15 AM	OVT	15 minutes to BRK from Break to In.
Meal	12 PM	ML1	1.5 hours for OVT from In to Meal.
In	12:15 PM	OVT1	15 minutes for ML1 from Meal to In.
Transfer	1 PM	OVT2	45 minutes for OVT1 from In to Transfer.
Out	5 PM		4 hours for OVT2 from Transfer to Out.

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Note. The Time and Labor Installation – Configurations page also contains options for defining a default punch pattern for all punch time reporters. The time reporting template punch pattern will override the settings on the Time and Labor Installation – Configurations page for the employees assigned to that time reporting template. The system delivered default punch pattern on both the Time and Labor Installation – Configurations page and Time Reporting Template page is *In*, *Break*, *In*, *Meal*, *In*, *Out*.

See Also

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Integrating with Project Costing, page 530

Chapter 7, "Defining Task Reporting Requirements," page 123

Chapter 4, "Setting Up Basic Tables," Configurations, page 36

Creating Templates for Rapid Time Reporting

This section provides an overview of rapid time reporting and 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 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.

Note. Validation TLX0010, Invalid Leave Time Taken, cannot be enabled for the Submit Time process.

See Appendix A, "Exceptions and Validations," page 659.

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 valid field values are stored in these tables:

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Field Name	Table
Task Detail	Various
TRC	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

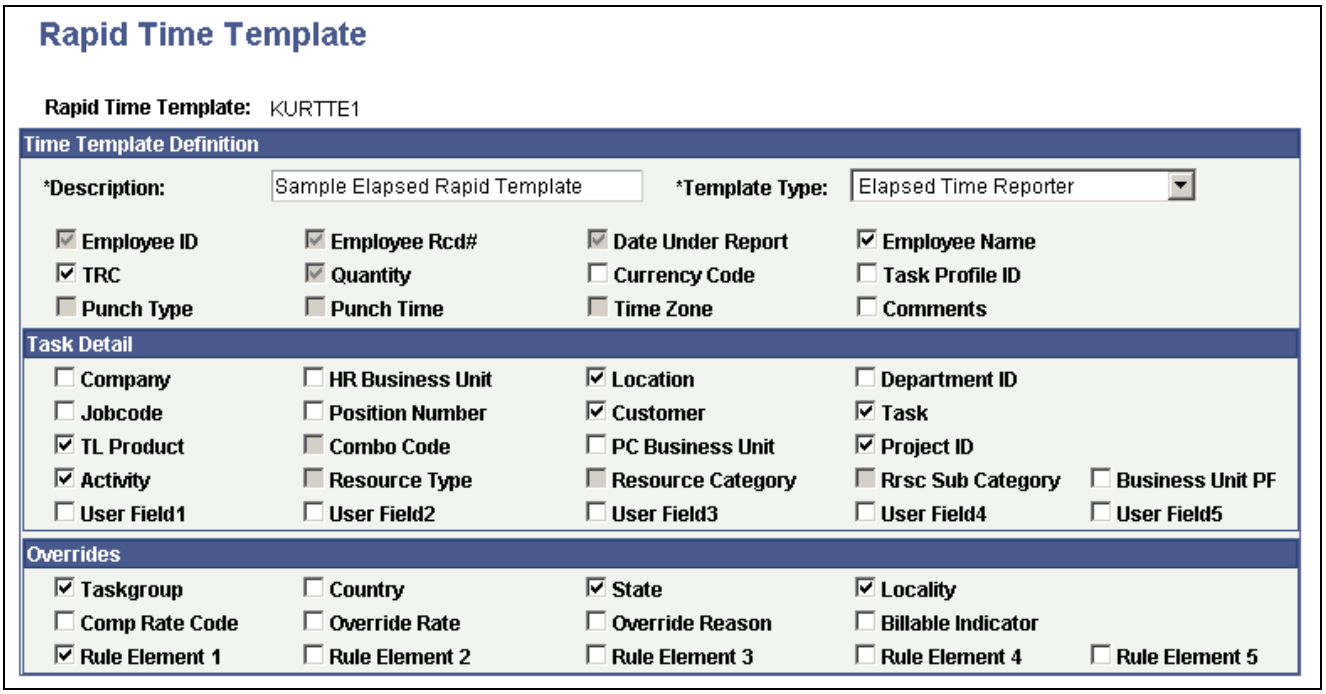
Page Used to Create Templates for Rapid Time Reporting

Page Name	Object Name	Navigation	Usage
Rapid Time Template	TL_RAPID_TMPLT1	Set Up HRMS, Product Related, Time and Labor, Time Reporting, 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.

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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 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) 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

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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. It is automatically selected and indicates that a Time Zone field is included on the Rapid Time Reporting page.

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 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.

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.

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This check box is required when you select the State and Locality check boxes in the Overrides group box.

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 Time and Labor is integrated with Payroll for North America, 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) 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 Human Resources Management.

Override Rate 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 Time and Labor.

Billable Indicator Select this check box if you want a Billable Indicator field to appear on the Rapid Time Reporting page. If Project Costing is integrated with Time and Labor, the value entered in this field is passed to Project Costing.

Rule Element 1-5 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

Chapter 12, "Creating Rules in Time Administration," Defining Rule Elements, page 241

Chapter 10, "Setting Up Time Reporters," Understanding Time Reporter Data, page 203

Chapter 7, "Defining Task Reporting Requirements," Understanding How to Create Task Values in Time and Labor, page 126

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Integrating with Project Costing, page 530

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Reporting Time Rapidly

This section provides an overview of rapid time reporting and discusses how to:

- Report time quickly.
- Generate a time card.

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.

Reported Time 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* . Invalid transactions appear on the Manage Exceptions pages for the manager's review. All time transactions are converted to reported time, whether exceptions are created or not. For those reported time entries that have related exceptions, the time can be corrected in the time reporting pages.

Validation TLX0010, Invalid Leave Time Taken, cannot be enabled for the Submit Time process.

See Chapter 4, "Setting Up Basic Tables," Using Validation Criteria, page 71.

If you selected the Automatic Rules Run option on the Time and Labor 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 if they pass the validation process.

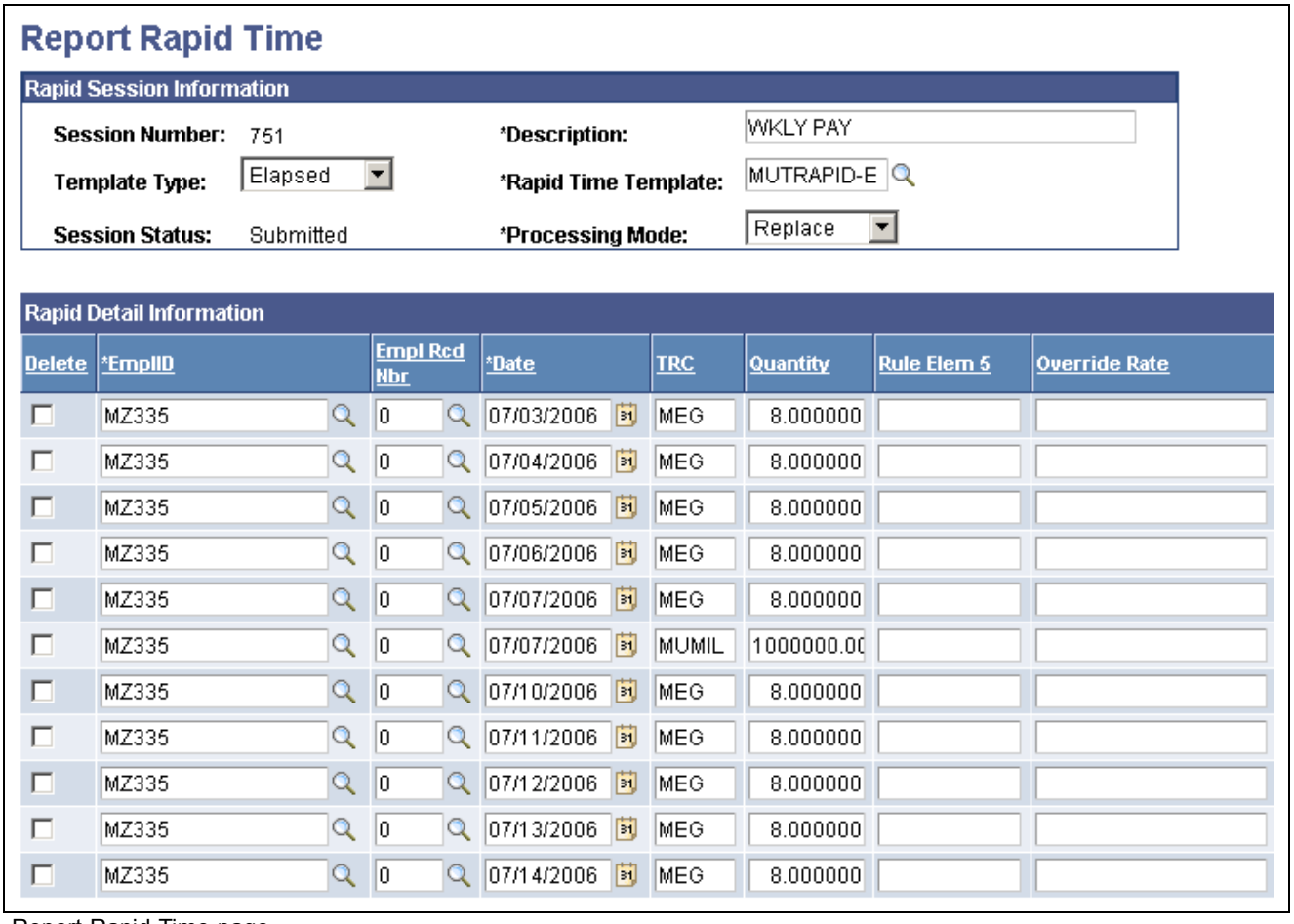
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Pages Used to Report Time

Page Name	Object Name	Navigation	Usage
Report Rapid Time	TL_RAPID_SESSION	Time and Labor, Report Time, Rapid Time, Report Rapid Time	Enter daily time quickly for time reporters and submit time for validation.
Time Card Report	TL_REPORTS_RNCTL	Time and Labor, Reports, Time Card, 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 an individual employee or by a group. The report contains lines for approval signatures for both the employee and the approving supervisor.

Reporting Time Quickly

Access the Report Rapid Time page.



Report Rapid Time page

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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, either Elapsed or Punch. This determines which Rapid Time Templates are available.

Warning! We recommend that you do not change the Template Type field 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 is deleted when the session is submitted.

Rapid Time Template Select the rapid time template you want. The template determines which data entry fields appear in the Rapid Detail Information section.

Warning! 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 Time and Labor 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.

Processing Mode The options available in this field are *Replace*, *Add*, and *Correction*. The option you select determines how the system processes the entries you make on this page:

- *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 Timesheet page or a Time Clock Device is not changed. For example, when reporting rapid elapsed time and the Processing Mode 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.

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- 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).
- When a session is resubmitted in *Correction* mode, reported time is regenerated and reported time that was submitted earlier for this session is deleted. In correction mode the Submit Time process deletes all time with an *ST* instance and regenerates submitted time. When a new session is submitted in *Correction* mode, there is nothing to delete and the session data is added as it is when you select *Add* mode.

Warning! If you upgraded from Time and Labor Release 8.8 or a prior release, make sure that any existing Rapid Time Reporting sessions that you resubmit using *Correction* mode were created and submitted using the current release of the application. To enable *Correction* mode for sessions created using release 8.8 or prior releases, first resubmit the session in *Replace* mode; after that, you can resubmit the session using *Correction* mode.

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 generate 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 appears in this field.

Date/Time 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.

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Adding Rows of Data During Rapid Time Reporting

You can add as many rows of data to a session as you need.

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 Timesheet 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 the Timesheet page.

See Also

Chapter 15, "Reporting Time," Selecting Fields to Display on The Rapid Time Reporting Page, page 416

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, Viewing the Status of Processes

Generating a Time Card

Access the Time Card Report page.

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.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

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CHAPTER 16

Using Time Collection Devices

This chapter provides an overview of third-party time collection devices (TCDs) and describes how to:

- Understand TCD setup and data integration.
- Define TCD setup data in Time and Labor.
- Send setup data to a TCD.
- Receive time from a TCD.
- View and resolve TCD errors.

Understanding TCDs

Time and Labor's time collection process enables you to control how the system collects and sends time-related information to and from third-party, time-collection devices.

You can collect both punched and elapsed time data from any TCD for processing through Time and Labor. You can send setup data to these devices for improved performance and flexibility. Setup data, such as time reporter and supervisor information, task detail, and restriction rules, are synchronized with the clock system. After time is reported using a TCD, Time and Labor can apply rules to the clock data and process it for the purposes of scheduling, reporting, and time management.

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, defined in Time and Labor, can then be used to allocate these costs.

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 by TCD taskgroup to use when enrolling time reporters into Time and Labor. Doing so allows time reporters assigned to a TCD taskgroup to enter time using any TCD configured to accommodate their taskgroup. For example, a time reporter can punch clock A when performing shipping tasks, and later, punch clock B found in another section of the warehouse when performing inventory tasks if both clocks were set up for that TCD taskgroup.

Time and Labor uses the information defined on the TCD pages to control the data going to the TCDs. It does not send data the TCD cannot handle, thus reducing traffic on the network.

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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 Time and Labor; you should schedule the process to run on a regular basis.

Note. You do not need to set up TCDs to use PeopleSoft Enterprise Mobile Time and Expense. Mobile Time and Expense sends service operations to Time and Labor by time reporter ID; these service operations contain elapsed time that Time and Labor sends to a pay system and to Project Costing. Mobile Time and Expense does not accept setup data from Time and Labor. For information about setting up integration with Mobile Time and Expense, see *"Integrating with PeopleSoft Financials."*

To set up a TCD, you need to:

- Establish flat file or Extensible Markup Language (XML) data integration information.
- Make sure your service operations are active.
- Set up the vendor interface for your organization.

  Determine communication setup links between your TCDs and Time and Labor.
- Create a TCD configuration in Time and Labor, as described later in this section.
- 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.

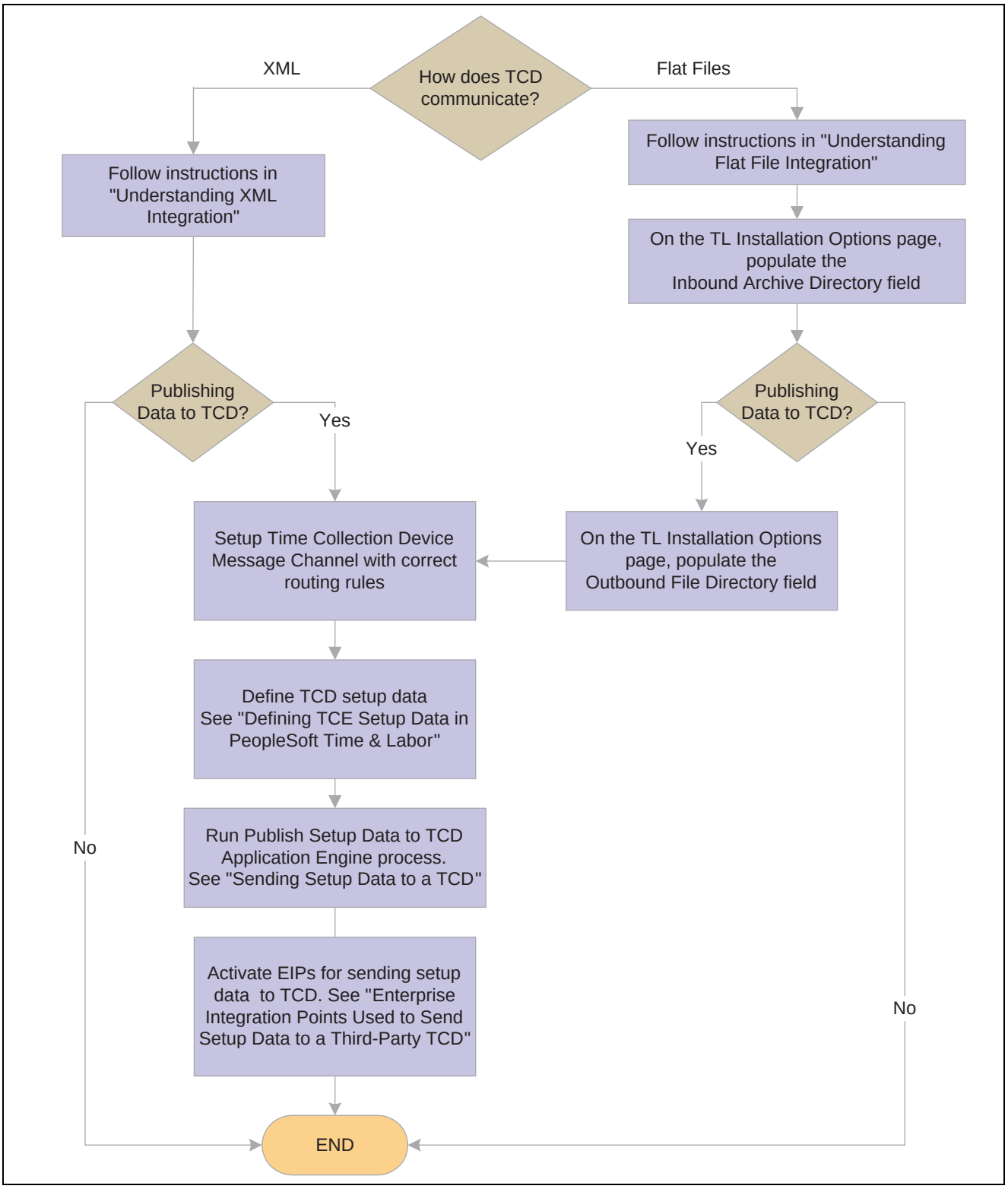
See Also

Appendix B, "TCD Interface," page 681

TCD Setup Process Flow

The following diagram is provided as a guide for integrating third-party TCDs with Time and Labor.

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Integrating Time and Labor with third-party TCDs

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Integration Points Used to Publish Data to Time and Labor

The following table lists the Integration Broker service operations used to publish data from a third-party TCD to Time and Labor.

Integration Point	Service Operation	Queue
T&L Labor Time Rep Elapsed Time	ELAPSED_TIME_ADD	ELAPSED_TIME
T&L Time Reporter Punch Time	PUNCHED_TIME_ADD	PUNCHED_TIME

Understanding XML Integration

If you use XML, time sent from the TCD is transferred through an active service operation that is automatically sent to the reported time tables. For setup data being sent to the TCD, service operations are transferred as often as you determine them to be published.

To set up XML integration:

1. Ensure that the service operations are active.

   Activate service operations and their handlers, routings, and queues.

2. Make sure nodes have been created on the Nodes component (IB_NODE).

   Each comm server is associated with a node.

3. Ensure that the appropriate ELAPSED_TIME_ADD and PUNCHED_TIME_ADD service operation routings are active for all required nodes on the Routings page in the Nodes component.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

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 by Time and Labor and converted to a message associated with a service operation. These service operations are integration points that send time data back and forth from Time and Labor to your TCD.

Flat files should be based on the table structures listed in the TCD Interface appendix 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 (PSCAMA stands for PeopleSoft Common Application Message Attributes). This record includes the message sequence and process instance fields.

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.

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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 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; 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 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 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 service operations are active.
2. Verify that one of the nodes on the PUNCHED_TIME and/or ELAPSED_TIME queues is the local node.

   The appropriate routings should be specified for all the nodes on the Routings page of the Nodes component (IB_NODE).
3. Set up the inbound file rule on the File Inbound page (Enterprise Components, Integration Definitions, Inbound File Rule).
4. On the Time and Labor Installation page, set up the File Dest for TCD Integration section.

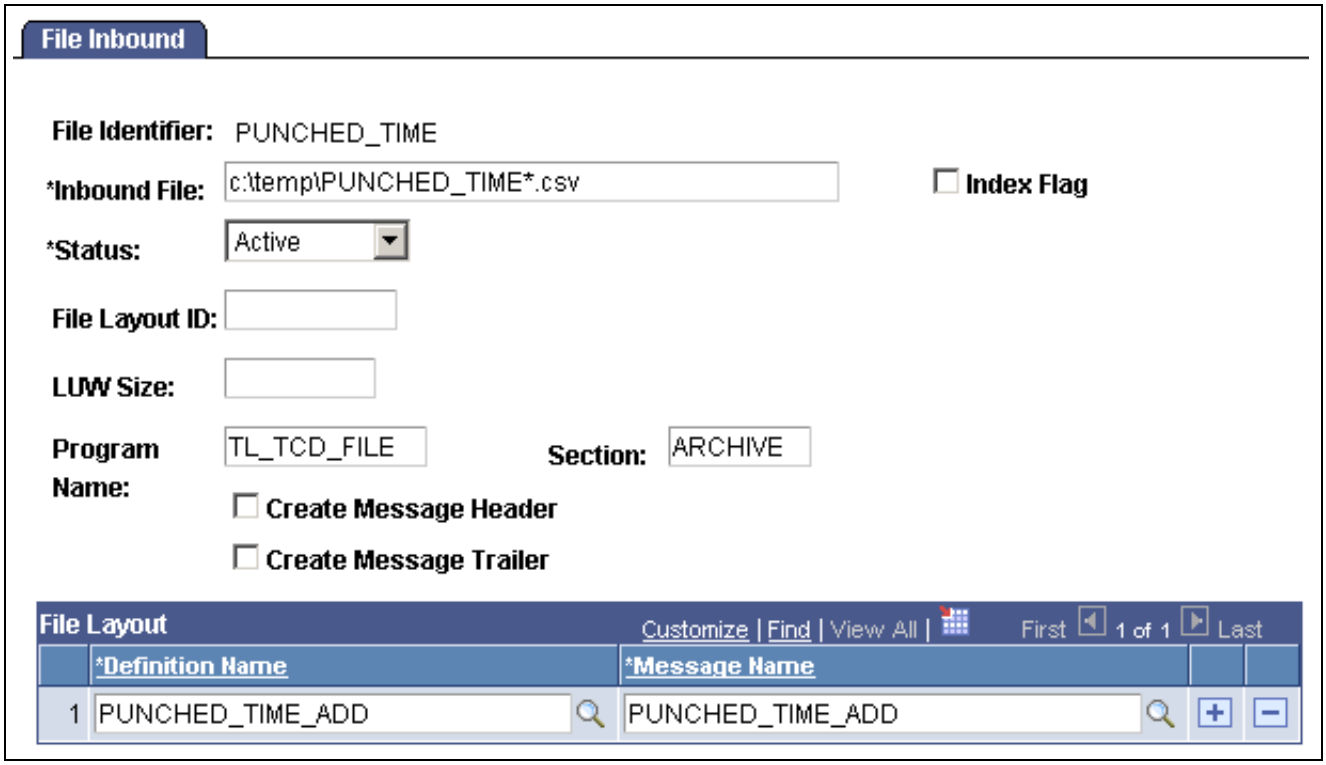
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See Chapter 4, "Setting Up Basic Tables," Setting Up System Defaults and Loading Dates, page 26.

5. Make sure that the selected directory will contain the elapsed or punch time files.
6. Your inbound file publish rules should look similar to the following:

   Inbound File for Punched Time: 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 graphic 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 Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish and create a run control.

After the punched time has been received by 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.

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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 Service Operations 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 Time and Labor.

See Also

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Integrating with PeopleSoft Expenses and Mobile Time and Expense, page 543

Enterprise PeopleTools PeopleBook: Integration Broker

Defining TCD Setup Data in Time and Labor

This section discusses 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.
- Generate a TCD Usage report.

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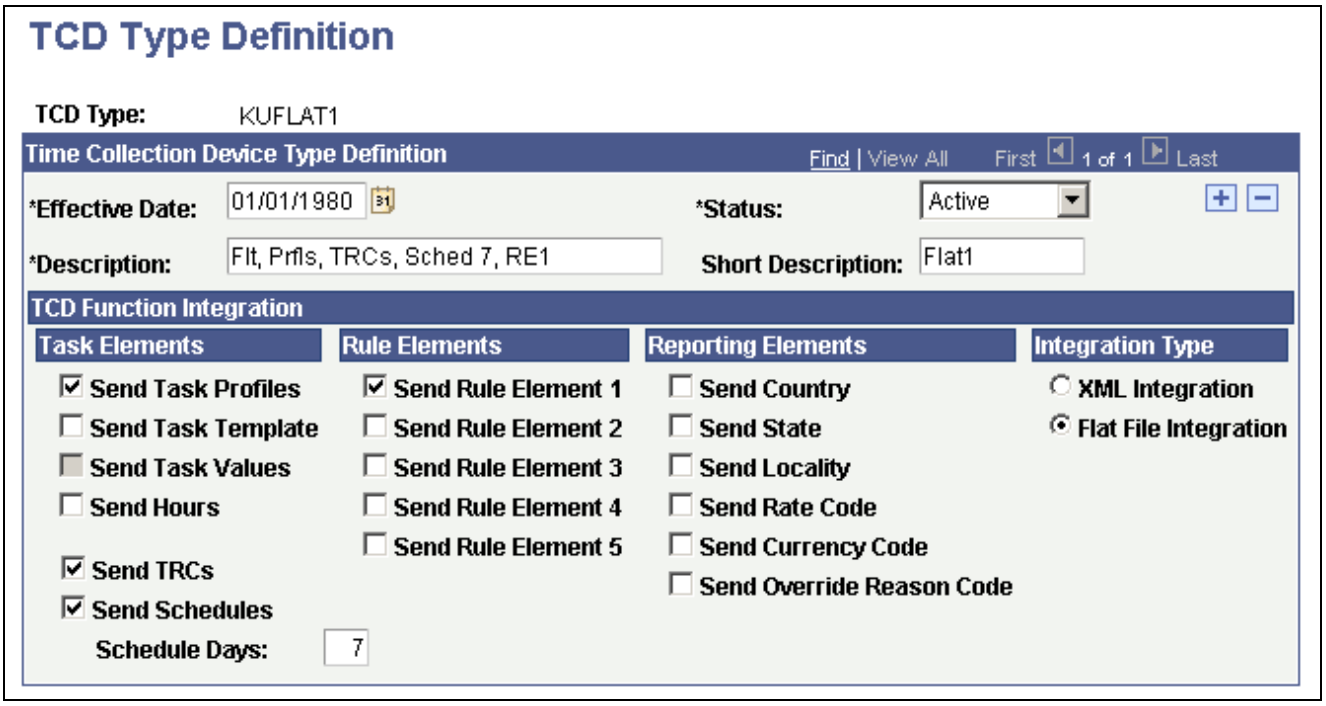
Pages Used to Define TCD Setup Data in Time and Labor

Page Name	Object Name	Navigation	Usage
TCD Type Definition	TL_TCDDEF_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Type Definition, TCD Type Definition	Select data elements to pass from Time and Labor to a TCD.
TCD Setup	TL_TCD_SETUP_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Setup, TCD Setup	Establish basic information about a TCD.
TCD Taskgroup	TL_TCD_TSKGRP_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Setup, TCD Taskgroup	Specify physical and taskgroup information for a TCD.
TCD Supervisor	TL_TCD_SUPERV_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Supervisor, TCD Supervisor	Establish supervisors allowed to perform TCD functions.
TCD Restriction Profile	TL_RESPRF_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Restriction Profile, 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	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, TCD Group, TCD Group	Establish TCD groups for time reporting purposes.

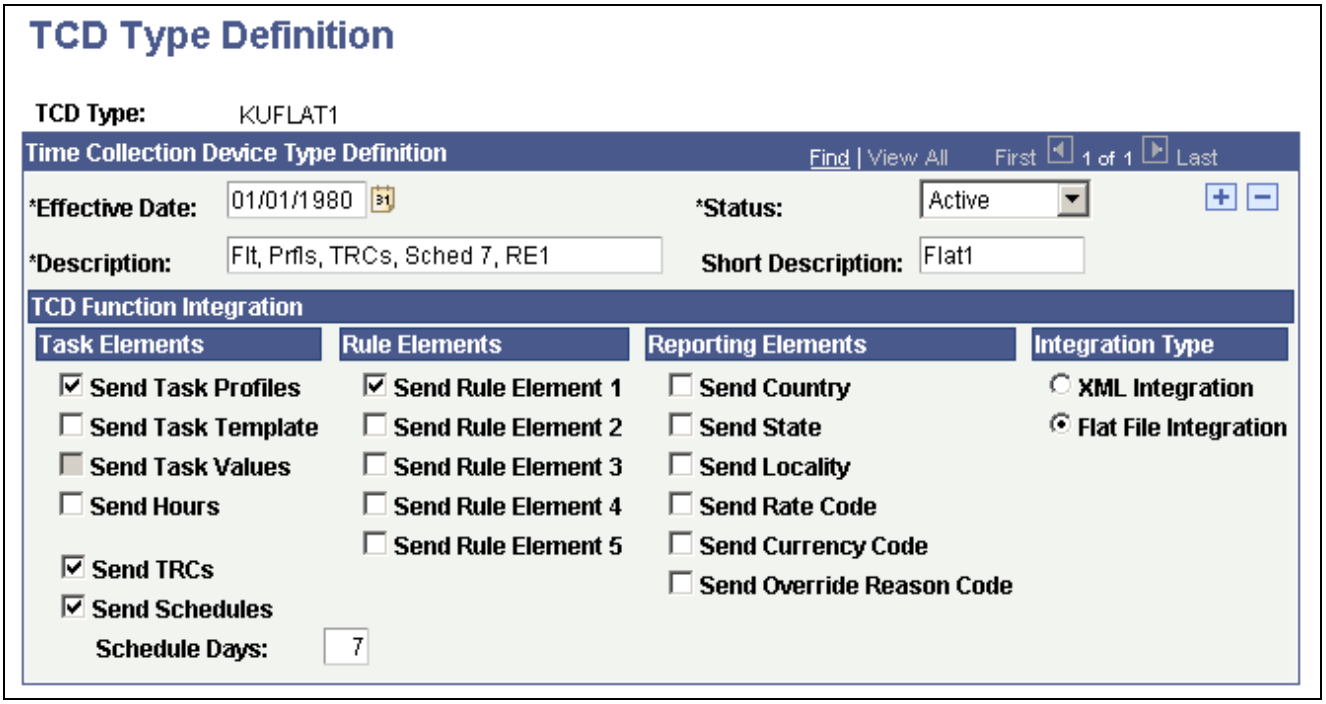
Establishing Data Elements to Send to a TCD

Access the TCD Type Definition page.

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TCD Type Definition page



TCD Type Definition page

Task Elements

Send Task Profiles Select to send valid task profiles from 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.

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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 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.

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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 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 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

Chapter 6, “Establishing Time Reporting Codes,” page 101

Chapter 7, “Defining Task Reporting Requirements,” page 123

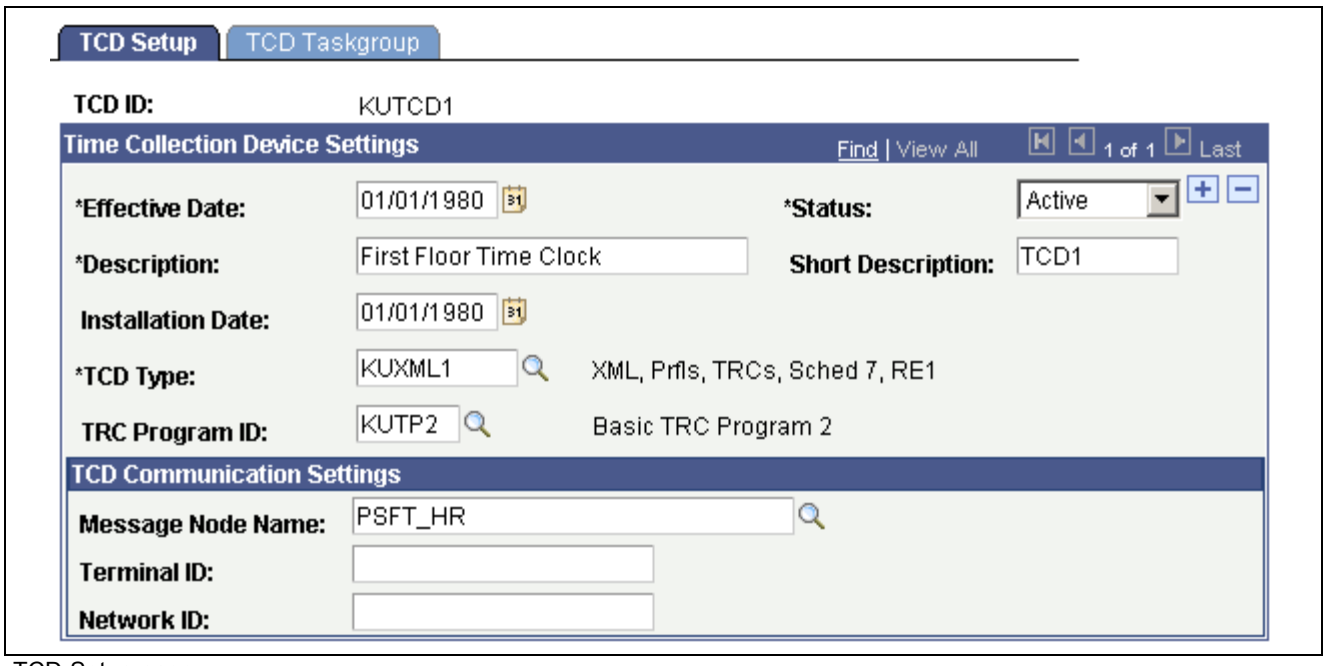
Chapter 12, “Creating Rules in Time Administration,” Defining Rule Elements, page 241

Chapter 4, “Setting Up Basic Tables,” Understanding Time and Labor Implementation, page 15

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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 Integration Broker technology.

Terminal ID Enter the ID you use for your TCD.

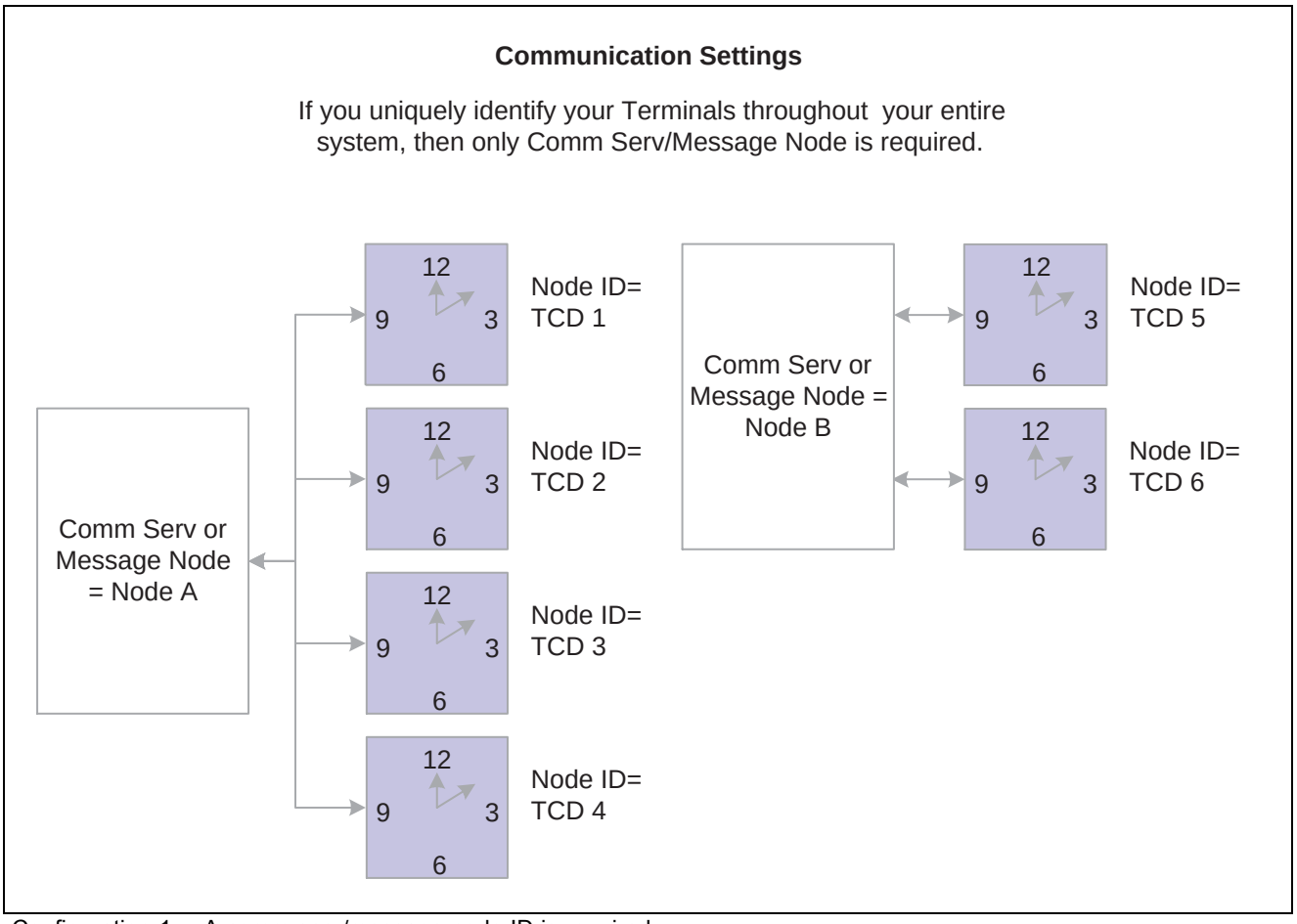
The value depends upon your system configuration. This field is required if your TCD is configured according to the Configuration 2 illustration following this table.

Network ID Enter the network ID to which you want Time and Labor to send data.

This field is required if your organization is configured according to the Configuration 3 illustration following this table.

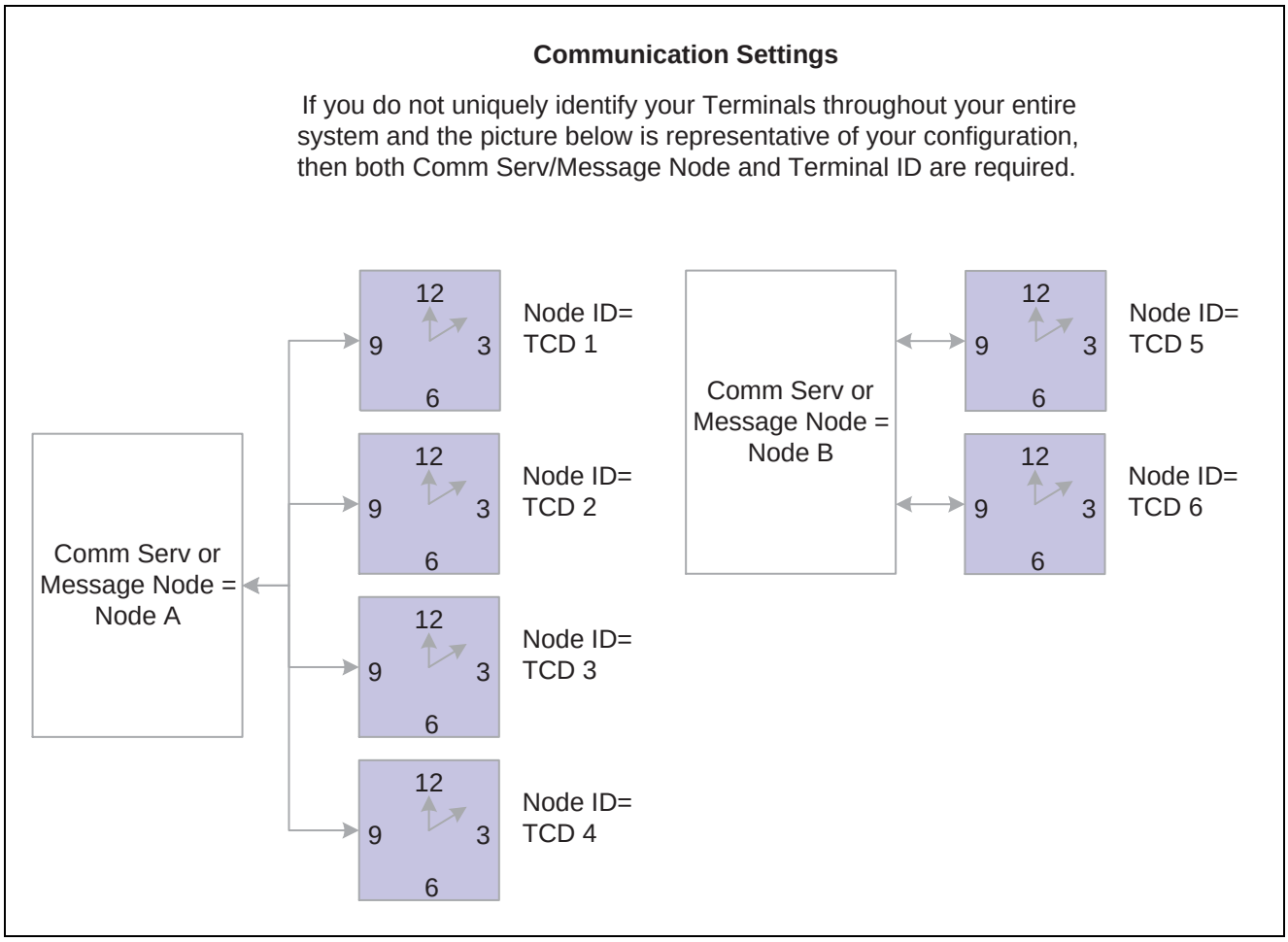
Use the following diagrams to determine which communication settings you need.

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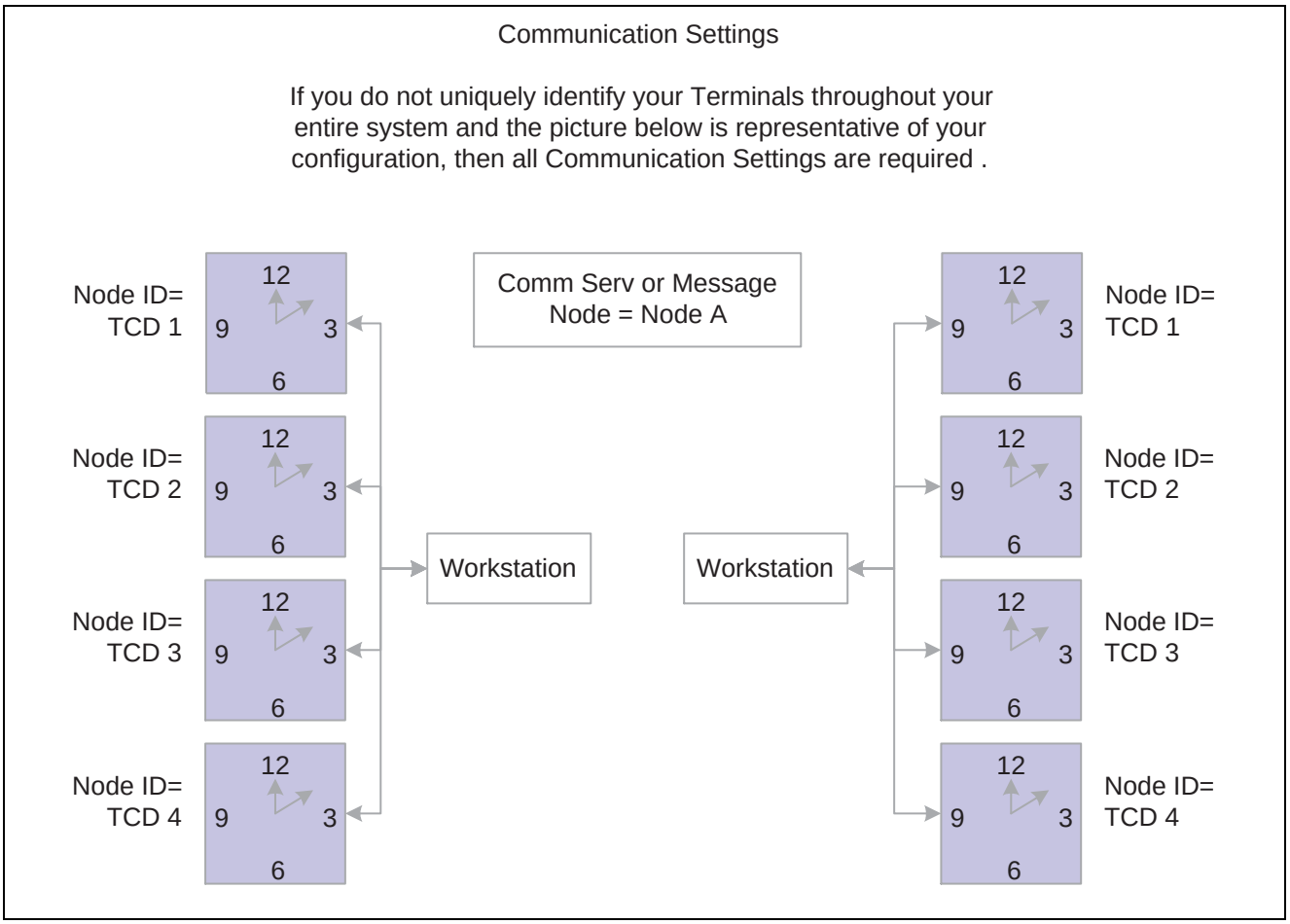
Configuration 1: - A comm serv/message node ID is required

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Configuration 2: Comm serv/message node and terminal IDs are required

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Configuration 3: All communication settings are required

Establishing Physical and Taskgroup Information for a TCD

Access the TCD Taskgroup page.

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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.

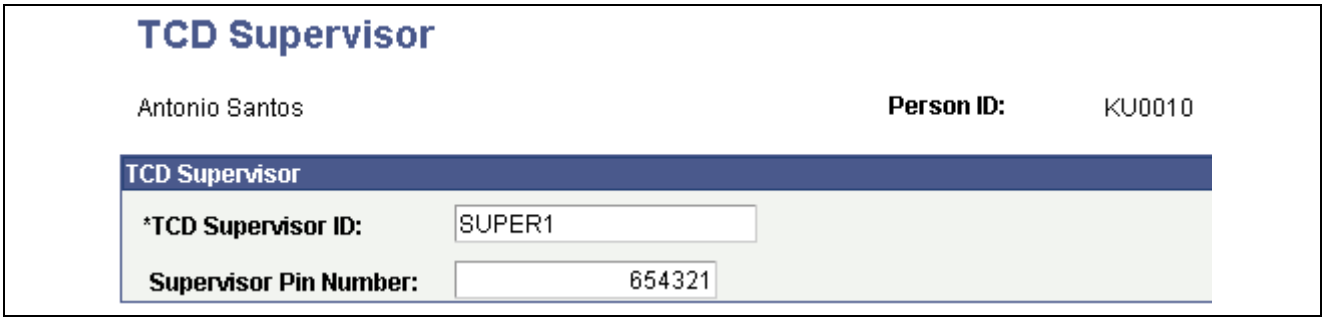
See Also

Chapter 7, "Defining Task Reporting Requirements," Defining Taskgroups, page 156

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Establishing TCD Supervisors

Access the TCD Supervisor page.



TCD Supervisor page

TCD Supervisor ID Enter a unique supervisor ID.

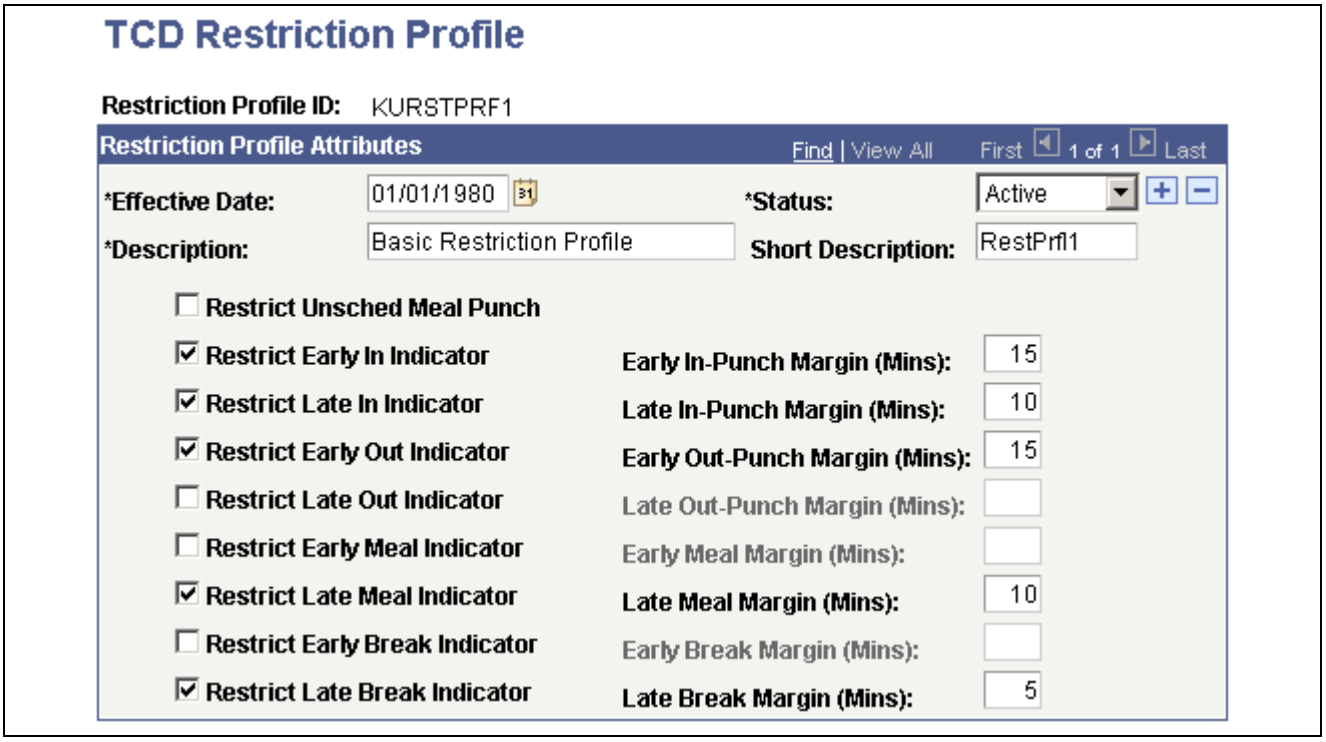
You assign supervisors to TCDs on the TCD Group page.

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

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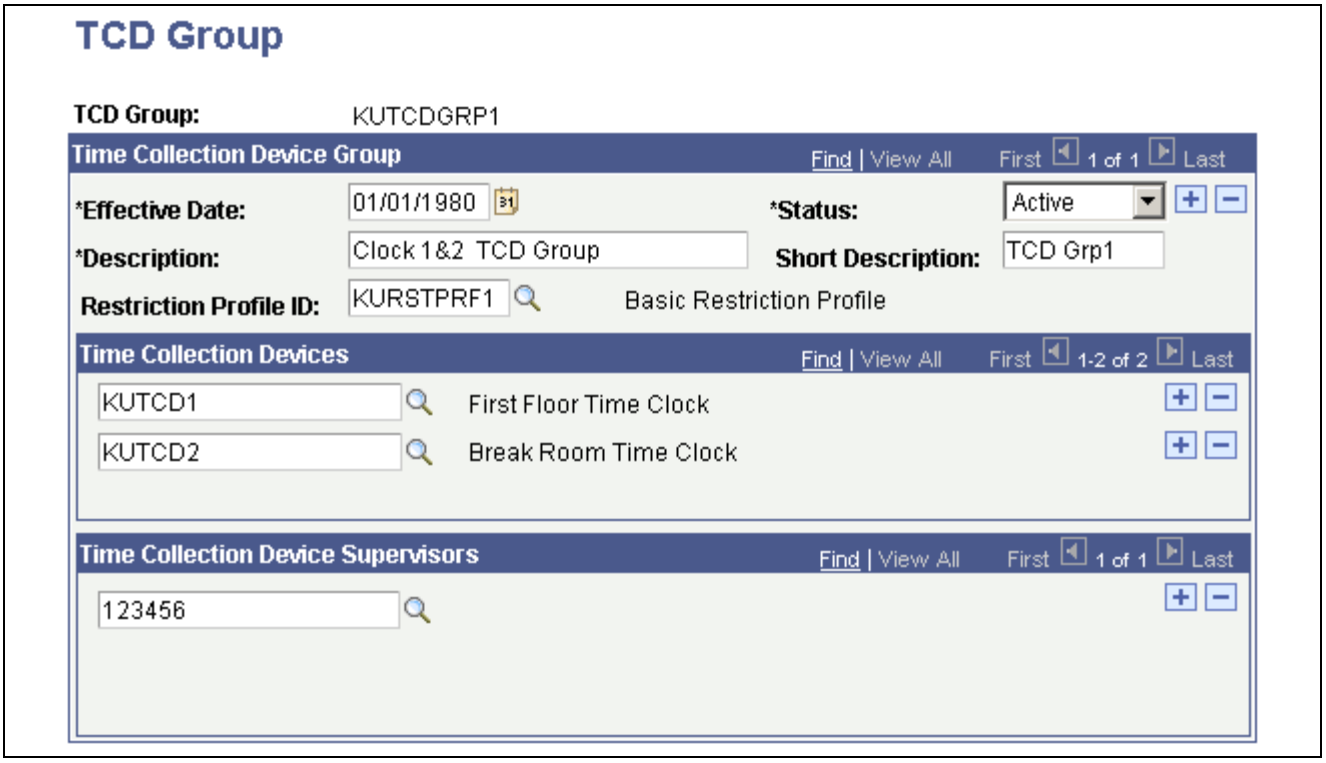
Restrict Unsched Meal Punch (restrict unscheduled meal punch)	Select to restrict a time reporter from punching out for an unscheduled meal.
Restrict Early In Indicator	Select to restrict a time reporter from punching in early.
Early In Punch Margin (Mins) (early in punch margin [minutes])	Enter the number 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.

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Setting Up TCD Groups

Access the TCD Group page.



TCD Group page

This page is used to group together a restriction profile ID, TCDs and TCD supervisors. TCD groups are associated to time reporters.

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

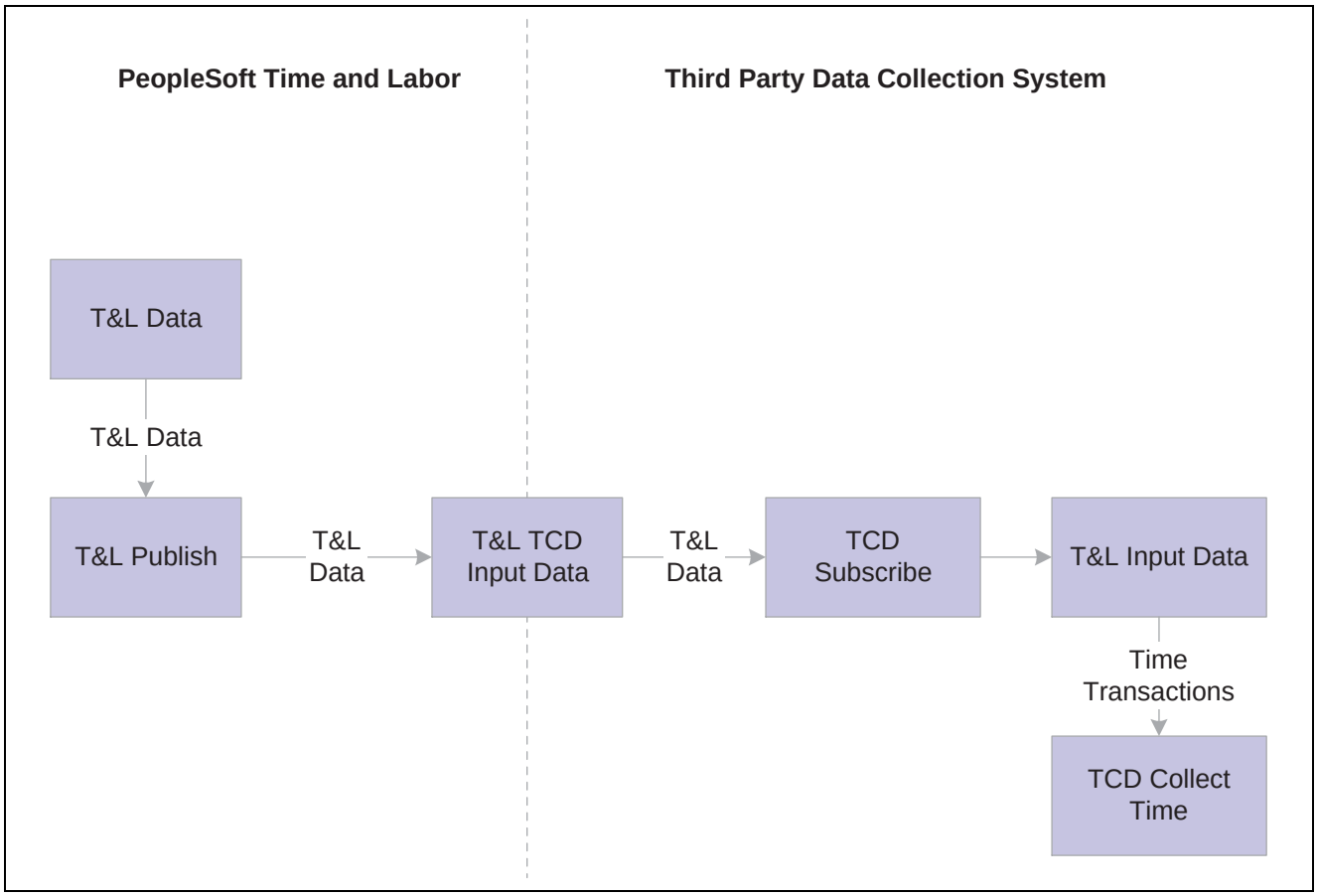
This section provides an overview of data publishing to a TCD and describes how to publish Time and Labor setup data.

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Understanding Data Publishing to a TCD

Time and Labor sends (publishes) setup data to your TCD in the form of messages associated with service operations. 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.

The next illustration depicts how Time and Labor publishes information to your TCD.



Time and Labor publishes information to a TCD

Incremental messages are sent when time reporter data changes in 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.

Integration Points Used to Send Setup Data to a Third-Party TCD

The following table lists the integration points that the Time and Labor TCD interface uses to send setup information from Time and Labor to a third-party TCD. All TCD integration points are batch published.

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Functional Name	Service Operation	QUEUE
T&L Payable Time Totals by TRC	TIME_DEVICE_PER_HRS_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L REPORTING ELEMENTS	TIME_DEVICE_RPT_ELMNT_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L SUPERVISORS	TIME_DEVICE_SUPERVISOR_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TASK ELEMENT CODE VALUES	TIME_DEVICE_TASK_VALS_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TASK PROFILES	TIME_DEVICE_PROFILES_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TASK TEMPLATES	TIME_DEVICE_TEMPLATES_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TIME REPORTER DATA	TIME_DEVICE_EMPL_ATT_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TIME REPORTER SCHEDULES (Outbound)	TIME_DEVICE_SCHEDULE_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TIME REPORTER PUNCH RESTRICTION RULE	TIME_DEVICE_RESTRICT_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP
T&L TRC INFORMATION	TIME_DEVICE_RPTG_CODE_FULLSYNC	TIME_COLLECTION_DEVICE_SETUP

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository on Customer Connection.

TCD Message Types

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.

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Table	Comment
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.
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

Chapter 16, “Using Time Collection Devices,” Establishing Basic Information About a TCD, page 436

Appendix B, “TCD Interface,” page 681

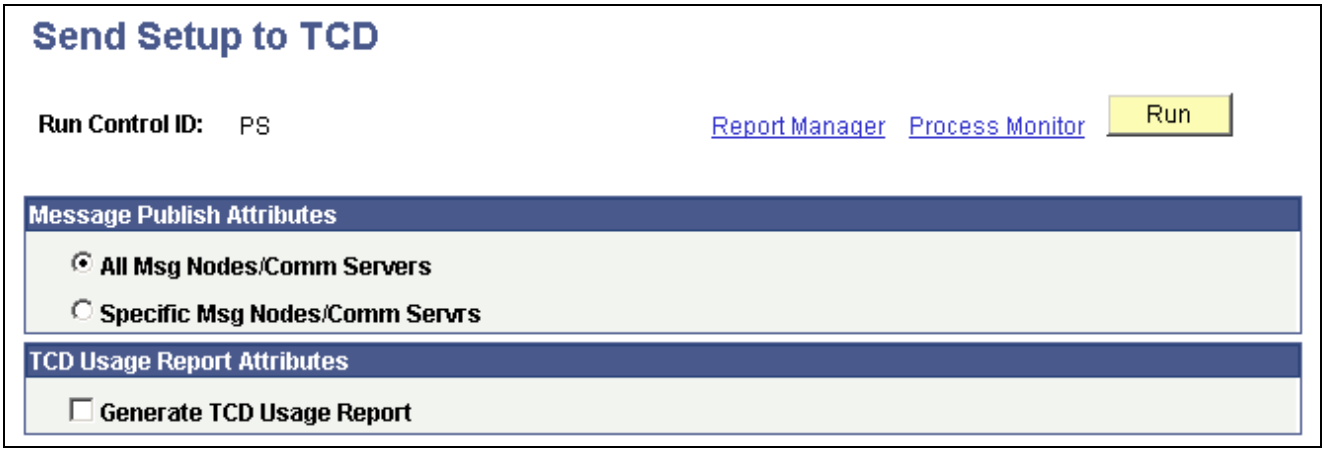
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Page Used to Send Setup Data to a TCD

Page Name	Object Name	Navigation	Usage
Send Setup to TCD	TL_TCD_RUN_PNL	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, Send Setup to TCD, Send Setup to TCD	Publish setup information for your TCD to retrieve from Time and Labor. This page can also be used to Generate a TCD Usage report that sums up the number of elements transmitted to a TCD during time reporting. The TCD Usage report can be used to estimate the memory requirements of each TCD.

Publishing Setup Data to a TCD

Access the Send Setup to TCD page.



Send Setup to TCD 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.

Select this check box if you want the system to generate a summary 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.

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What is actually sent to the time collection device is determined by the parameters defined on the TCD Type pages associated to each TCD.

The TCD Usage report summarizes 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

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  - Description
- Task templates
  - Task template
  - Description
- Task elements
  - Task Template ID
  - Task element code
  - Description

See Also

Enterprise PeopleTools PeopleBook: Process Scheduler

Receiving Time from a TCD

To receive time data from a TCD into Time and Labor, you must initiate the Subscribe 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.

Stopping the TCD Error Queue

If errors occur, the TCD error queue will stop time data from proceeding to the Reported Time tables if the any of following are invalid:

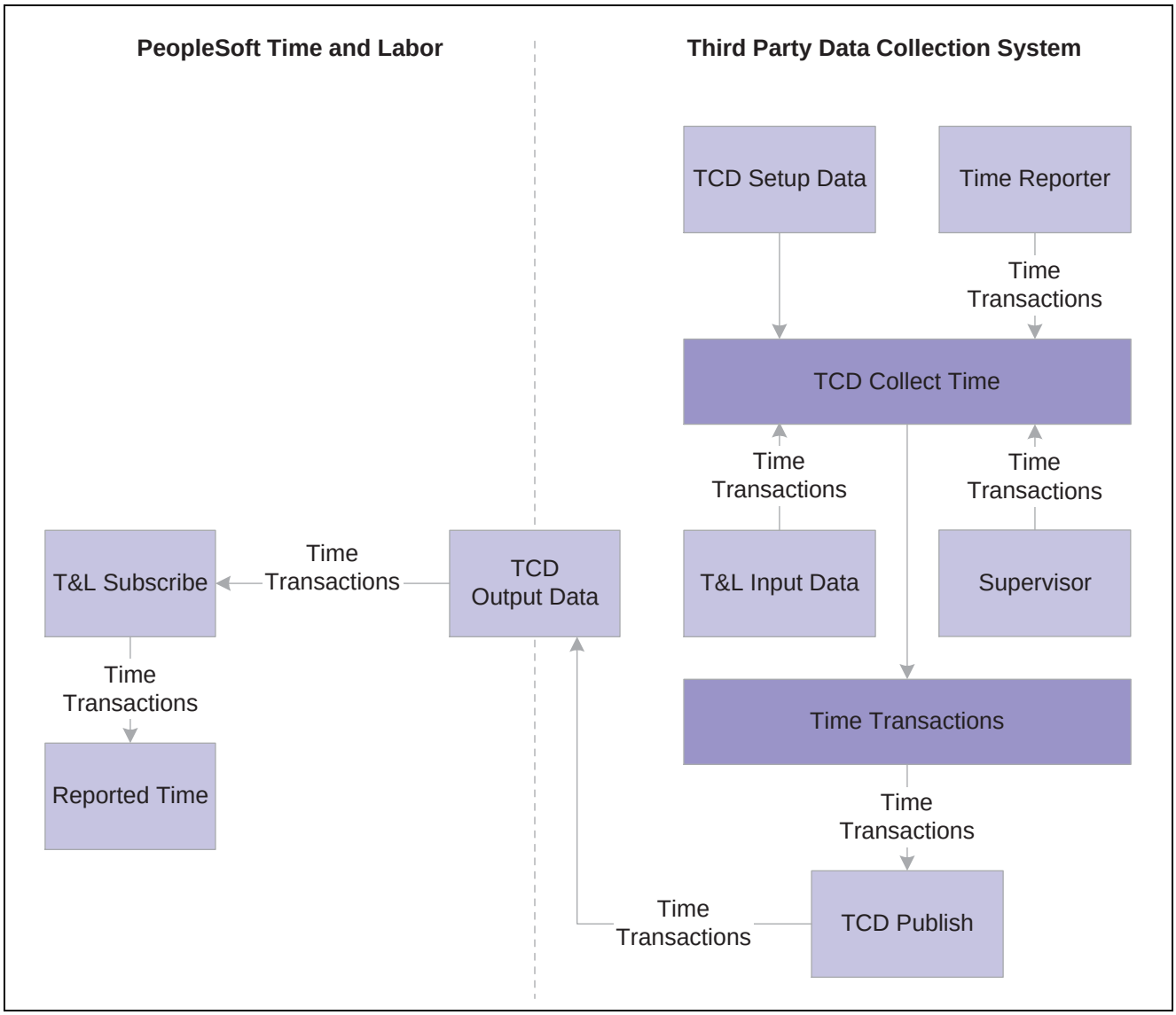
- EMPLID
- EMPL RCD
- BADGE ID
- TASK ELEMENT CODES
- DUR (Date Under Report)
- PUNCH DATE/TIME
- ADD/DELETE INDICATOR
- DELETE DATE

TCD Error Queue Does Not Stop the following elements if they are invalid, as these will be validated as Reported Time is created:

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- 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 Time and Labor collects data from a TCD.



Time and Labor collects data from a TCD

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Viewing and Resolving TCD Errors

This section discusses how to:

- View TCD errors.
- View and fix elapsed time errors.
- View or amend elapsed time attributes.
- View and fix punched time errors.
- View or amend punched time attributes.

Note. Fixing TCD errors requires detailed knowledge of the interface data structure.

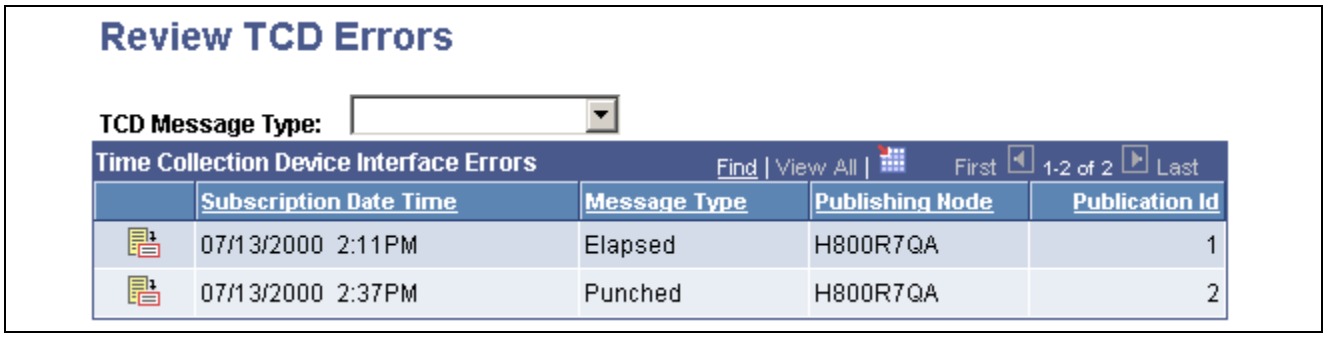
Pages Used to View and Resolve TCD Errors

Page Name	Object Name	Navigation	Usage
Review TCD Errors	TL_TCD_EIP_ERR	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Review TCD Errors, Review TCD Errors	View TCD error messages.
TCD Elapsed Time Errors	TL_ELAPSED_ERROR	Click the TCD Error Detail button on the Review TCD Errors page for the Elapsed time row that you want to view.	View and fix elapsed time errors.
Elapsed Time Attributes	TL_ELAPSED_ERROR1	From the TCD Elapsed Time Errors page, select the Elapsed Time Attributes tab.	View or enter additional information for elapsed time sent to Time and Labor from your TCD.
TCD Punched Time Errors	TL_PUNCH_ERROR	Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Review TCD Errors Click the TCD Error Detail button in the Punched time row that you want to view.	View and fix punched time errors.
Punched Time Error Attributes	TL_PUNCH_ERROR1	From the TCD Punched Time Errors page, select the Punched Time Error Attributes tab.	View or enter additional information for punched time sent to Time and Labor from your TCD.

Viewing TCD Errors

Access the Review TCD Errors page.

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Review TCD Errors page

TCD Error Detail button — Click the TCD Error Detail button 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 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.

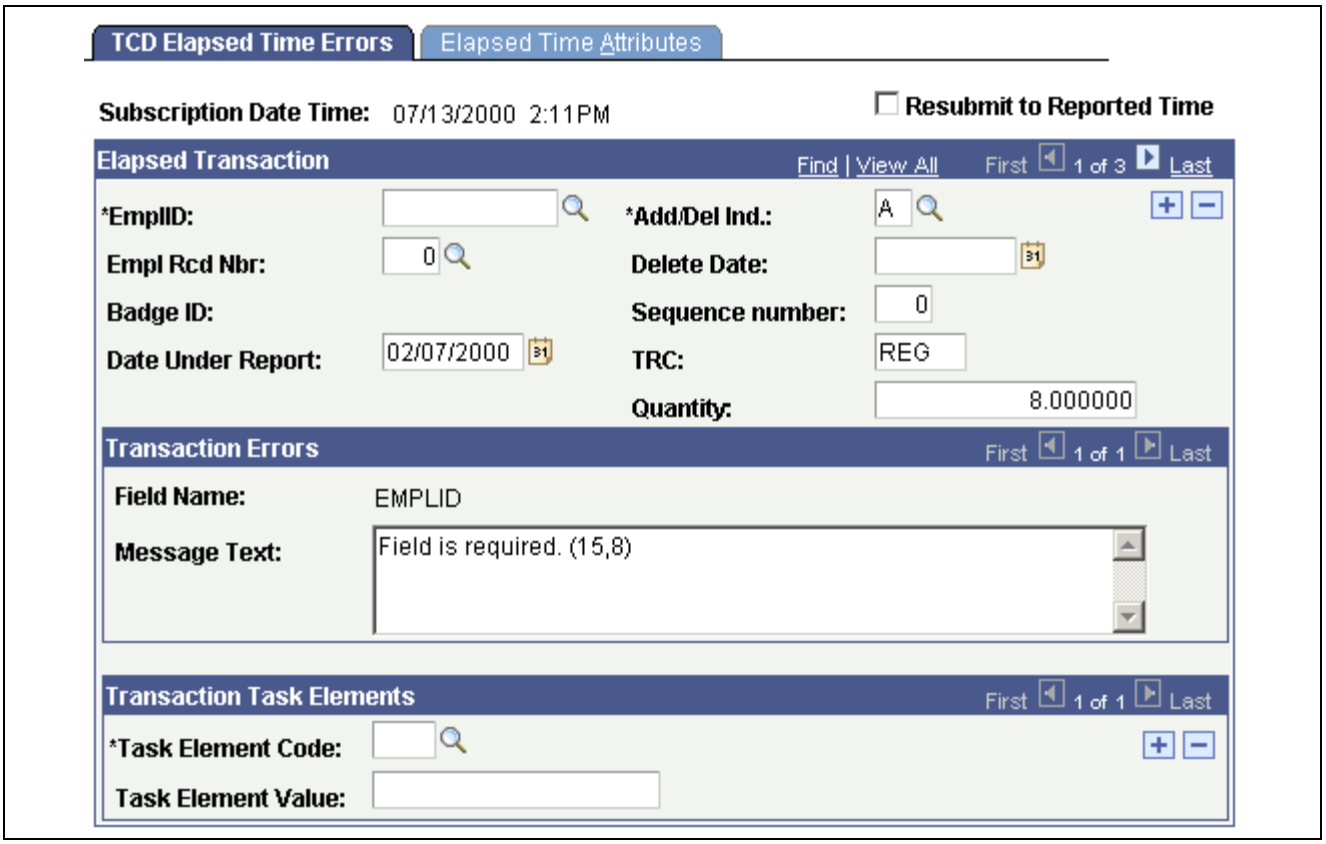
This is either the node you established during TCD setup or the system node used with PeopleSoft Mobile Time and Expense.

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.

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TCD Elapsed Time Errors page

Subscription Date Time Displays when the message was received by Time and Labor.

Resubmit to Reported Time Select to submit the corrected time to 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 a badge ID or a combination of the employee ID and employee record number.

Add/Del Ind. (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.

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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

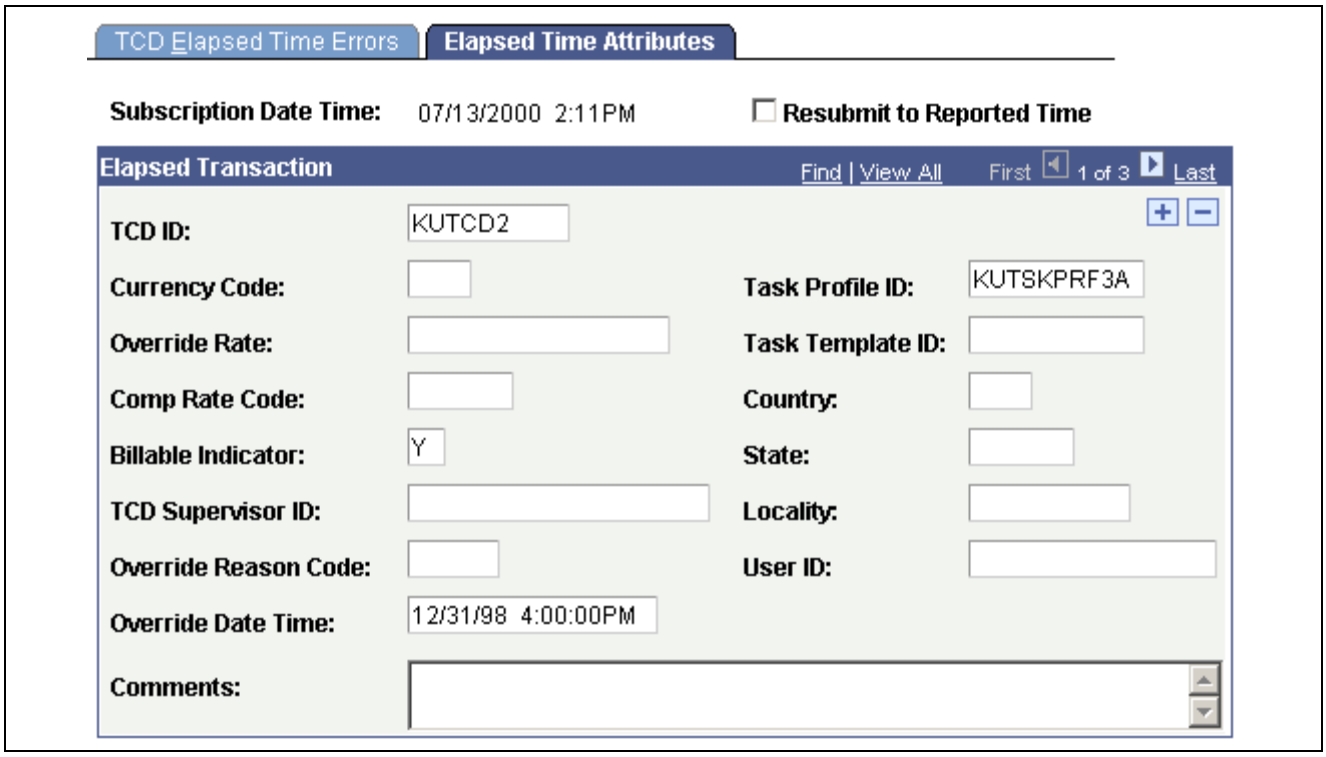
Task Element Code and **Task Element Value** Displays, or you can select or enter, the task element code and value to send to the Reported Time tables for the time being reported.

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.



Elapsed Time Attributes page

You can enter a new value for any field on this page except the Override Date Time field.

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Currency Code The system displays, or you can enter, the currency code when the quantity for the time equals money.

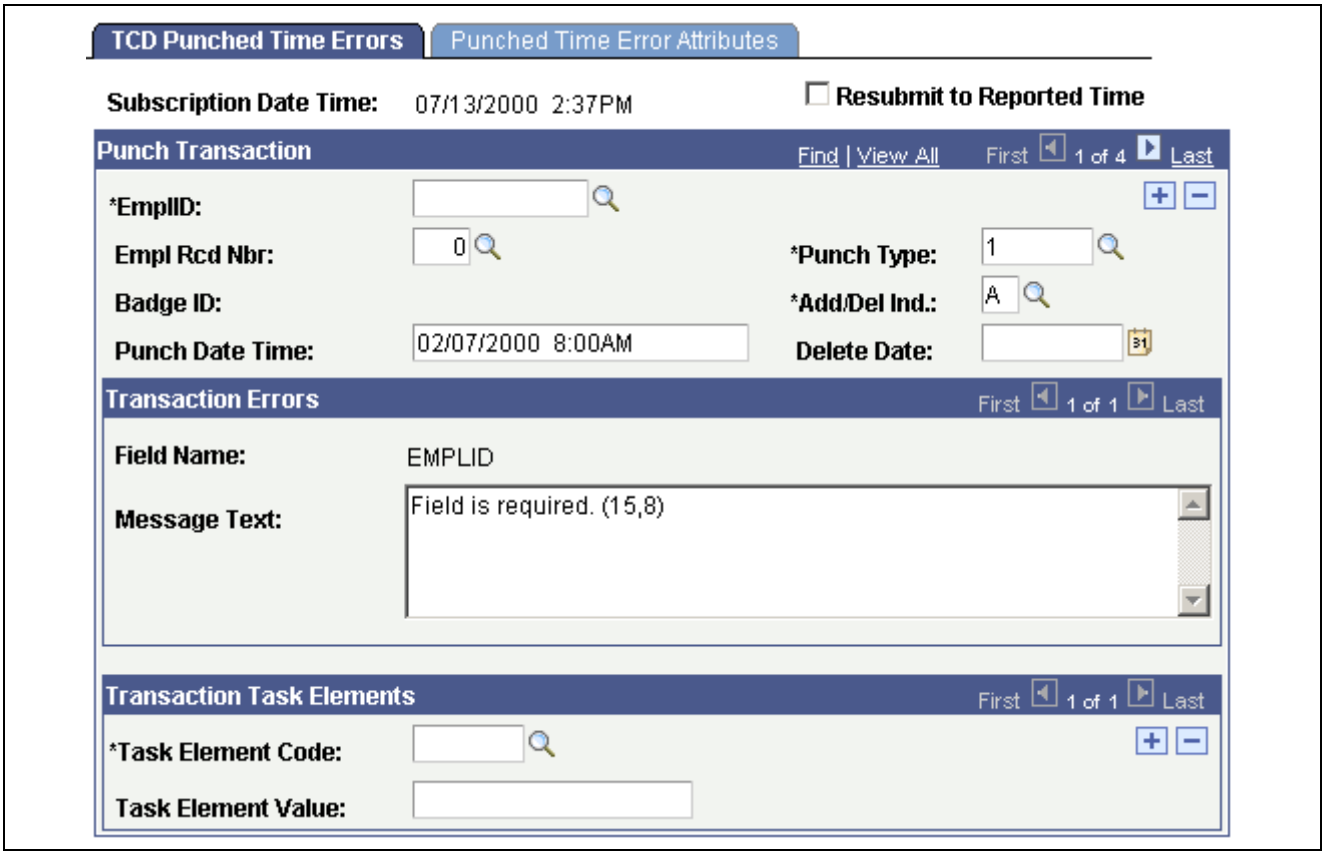
Comp Rate Code The system displays, or you can enter, a comp rate code for the time being reported. The code is used to calculate the time reporter's pay.

Billable Indicator If populated, the system uses the Billable Indicator field in conjunction with costs that it sends to Project Costing.

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 Time and Labor.

Resubmit to Reported Time Select to submit the corrected time to Time and Labor. When you click OK or Apply, the system submits all resolved transactions within the message to the Reported Time tables.

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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 and an 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.

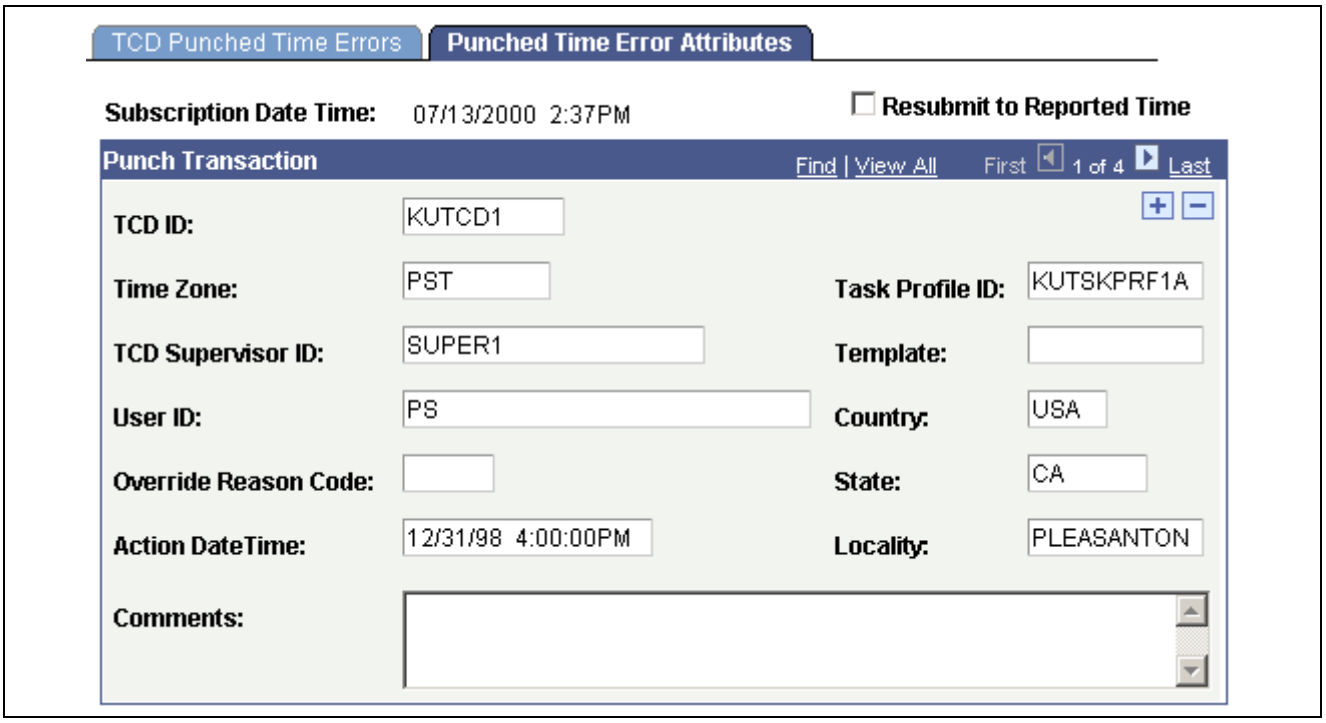
Apply

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.

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Punched Time Error 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 Timesheet page if this field is selected on the associated Time Reporting template for the time reporter.

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CHAPTER 17

Managing Time

This chapter provides an overview of managing time reporting, lists prerequisites for enabling absences on timesheets, and discusses how to:

- Approve reported time.
- Approve payable time.
- Manage exceptions.
- Adjust time.
- Audit time.
- Override rules for a day.

Understanding the Time Reporting Process

After time has been reported, it is managed by approving the time, resolving exceptions, modifying the time, or adjusting time that has been reported or paid.

Depending on your requirements, four options exist that can be set up when configuring time approvals:

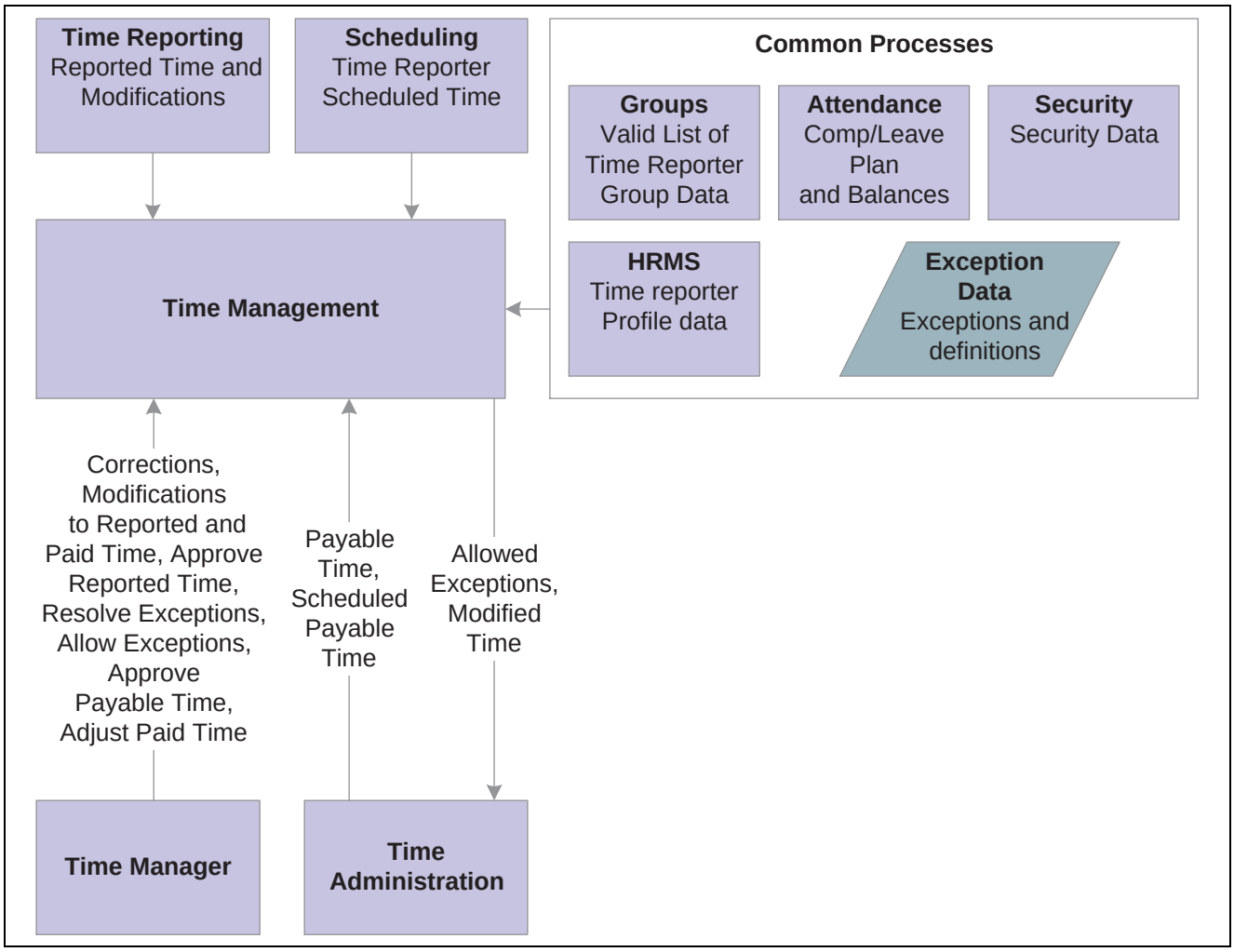
- Reported time.
- Payable time.
- Both reported and payable time.
- None.

You can also set up email notifications for particular events. For managers, these include reported time needing approval, payable time needing approval, exceptions that have been generated, or a scheduled event that has been modified. For employees, email notifications include reported time which has been approved, payable time which has been approved, reported time which has been denied, or reported time which has been modified.

You can use system security to determine which pages display for different types of users. For example, you may want a data entry clerk to view only reported or payable time. The User ID for the data entry clerk determines which pages are displayed. In this case, the user can only view 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 User ID determines which page appears; in this case, the Adjust page is accessible.

This graphic depicts the interaction between time reporting, scheduling, the time manager, and other common areas within the application with the Manage Time pages:

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Manage Time process flow

Prerequisites for Enabling Absences on Timesheets

Absence Management integration enables employees and their managers to enter and work with absence event information that is entered in PeopleSoft Enterprise Absence Management or Time and Labor, and is integrated with either PeopleSoft Enterprise Payroll for North America or PeopleSoft Enterprise Global Payroll. Employees that are active in Absence Management must be enrolled in Time and Labor. The absence event pages that you use to manage time in Time and Labor are included in this chapter.

The Absence Management grids that are displayed on the Timesheet pages in Time and Labor, including the absence event entries and absence entitlement balances and links for requesting and approving absence events, are displayed only if either Absence Management and/or Global Payroll are selected on the Products page of the HRMS Installation Table component.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HRMS," Pages Used to Set Up and Report on Implementation Defaults.

To work with absence event information on employee timesheets, the employee's Pay System value must be either *Global Payroll* or *Payroll for North America* and the Absence System value must be *Absence Management* on the Payroll page of the Job Data component in Workforce Administration.

Note. For Global Payroll employees the Absence System value is hidden and defaults to Absence Management.

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See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Payroll Processing Data.

Employees that are active in Absence Management must be enrolled in Time and Labor.

See Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206.

The Country Take component is used to define Country-specific rules that apply to all Take elements for a given country. They control some of the field displays on the self service pages, and determine if online Forecasting and Balance Inquiry processes can be used for any Take elements that are set up for the country. You can define a different set of self service rules for each country.

On the Absences page of the Country Take component, ensure that you enable entry in Time and Labor for the absence Take elements that you want to enter on the Timesheet page.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Setting Up Self Service Absence Transactions," Defining Self Service Absence Rules by Country.

For each Absence Take element that you want to make available to self service users, you define an additional set of rules. These rules specify whether partial-day absences are allowed, approval requirements for absence requests, how to display forecasting results, and other usage rules. It is important to set up the Country Take component and understand the significance of the values chosen or entered on this component prior to entering values through absence self service.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Defining Absence Elements," Pages Used to Define Absence Take Elements.

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

Chapter 9, "Establishing Static and Dynamic Groups," Creating and Updating Dynamic Groups, page 198

Chapter 11, "Establishing Time and Labor Security," page 221

Approving Reported Time

This section provides an overview of approving reported time and discusses how to:

- Approve reported time.
- Work with timesheets.
- Run online rules and view payable time detail.
- Review and enter absence events.
- Enter absence event details.
- Forecast absence events.
- Approve absence events.

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- View reported hours summary and absence entitlement balances.

Understanding Approval of Reported Time

You have the ability to require approval of reported time, after it has been submitted, by selecting the Approve Reported Time option on the Workgroup or TRC definition. If specified for a workgroup, all reported time for employees in that workgroup needs approval. If specified at the TRC level, only reported time associated with the TRC needs approval.

Reported time that requires approval, regardless of the source, must be approved by the time reporter's manager before it will be selected and processed by Time Administration to generate payable time. Time that has been submitted, either through interfaces or online, is available for manager approval. The manager can approve, adjust, or deny the time, and add additional comments where necessary.

When approved, the reported time status is *Approved*, and it is ready to be selected by the Time Administration process for payable time generation.

If reported time is denied, the reported time is given a status of *Denied* and will not be processed by Time Administration. The time will remain in a *Denied* status until it is either modified and resubmitted, or the manager decides to approve the time.

Email notifications can be configured for both the manager and employee for certain time reporting events. The manager can be notified when there is reported time that needs approving, and employees notified when reported time has been approved, denied or modified. This is set up on the Time and Labor Installation component, on the Email Notification page.

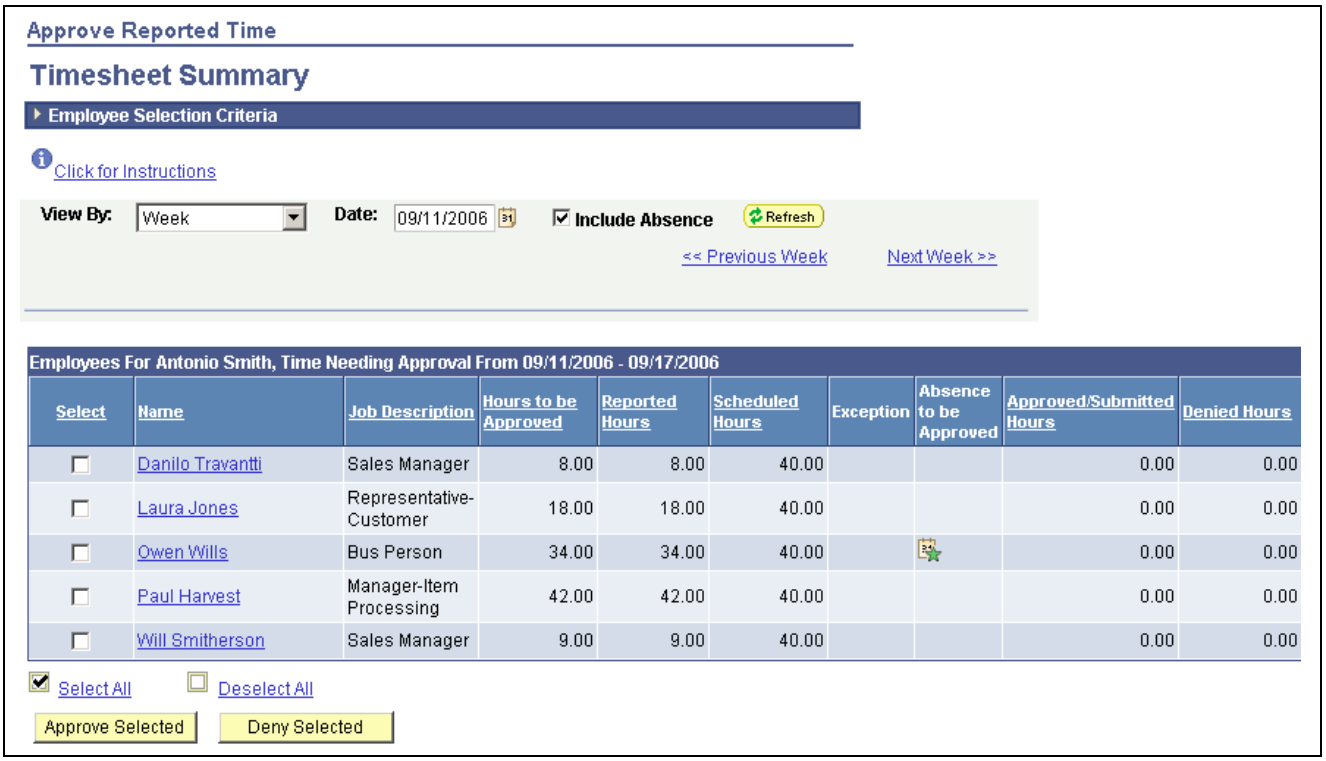
Pages Used to Approve Reported Time

Page Name	Object Name	Navigation	Usage
Approve Reported Time Summary	TL_MSS_TIMESHEET	Manager Self Service, Time Management, Approve Time and Exceptions, Reported Time, Approve Reported Time	View a group of employees or an individual employee's reported time needing approval.
Timesheet	TL_RPTD_ELP or TL_RPTD_PCH	Click the employee name link on the Approve Reported Time page.	Approve or deny an employee's reported time. The format of the timesheet depends on whether the employee is an elapsed or punch time reporter.
Payable Time Detail	TL_MNG_PAY_DET_VW	Click the Apply Rules button on the Timesheet page.	Review details of payable time after online rules are run.

Approving Reported Time

Access the Approve Reported Time Summary page.

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Approve Reported Time – Timesheet Summary page

Employee Selection Criteria

Enter selection criteria in the fields in this collapsible group box. You can select a group of employees or individual employees. The fields that are displayed in this group box are defined in Manager Search Options. If the Manager Search Options are cleared, the criteria that are displayed are derived from the Manager Search Defaults page in the Time and Labor Installation component.

See Chapter 22, "Using Manager Self-Service for Scheduling Components," Setting Up Manager Search Options, page 628.

Click for Instructions Click this link to view instructional text for using this page.

View By This field determines how much reported time you see in the summary list. The page refreshes each time you select an option. The options are *Day*, *Week*, *All Time Before* and *All Time After*:

- Select *Day* to display any reported time with a status of *Needs Approval* or *Denied* for the day specified.
- Select *Week* (default) to display any reported time with a status of *Needs Approval* or *Denied* for the week specified. This field uses user preferences to display the order of days in the Timesheet grid.

  See Chapter 20, "Using Self-Service Components," Pages Used to Set Up User Preferences, page 557.
- Select *All Time Before* to display all reported time with a status of *Needs Approval* that exists prior to the date specified in the *Date* field. The Previous and Next links do not appear, as they are not relevant for this option.
- Select *All Time After* to display all reported time with a status of *Needs Approval* that exists in the future from the date specified in the *Date*

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field. The Previous and Next links do not display as they are not relevant for this option.

Note. If the value in the View By field is *All Time Before* or *All Time After,* the system displays the first row needing approval because the manager could have denied time in the past.

Date The default is today's date when you first enter this page. If the View By option is *Week*, the system checks the value in the Start Day of Week field on the Time Reporting Preferences page and displays the week accordingly.

See Chapter 20, "Using Self-Service Components," Pages Used to Set Up User Preferences, page 557.

If the View By option is *All Time Before*, the system returns a list of employees who have time needing approval prior to that date. If the View By option is *All Time After*, the system returns a list of employees who have time needing approval after that date.

Include Absences Select this check box to include employees who have one or more reported absences needing approval within the specified time period.

Refresh Click this button to refresh the page after changing date-related criteria or selecting or clearing the Include Absences check box.

Employee Grid

Title Bar This group box title displays the manager's name and the date range being viewed.

Select Select the check box next to the employee name to approve or deny reported time for the timeframe you selected.

The Select check box is grayed out if the employee has only a reported absence to be approved, and no reported work time.

Note. Reported absences cannot be approved on the Approve Reported Time Summary page. You must access the employee's Timesheet to approve an absence.

Name Click the time reporter's name link to display the Timesheet grid.

Exception Displays an icon indicating that exceptions exist.

Absence to be Approved Displays an icon indicating that absences requiring approval exist.

Note. All columns are displayed when viewing reported time using the by *Day* or *Week* View By options. If the *All Time Before* or *All Time After* options are selected, fewer columns are displayed. All columns can be sorted, ascending or descending, by clicking the column headers, with the exception of the TRC columns.

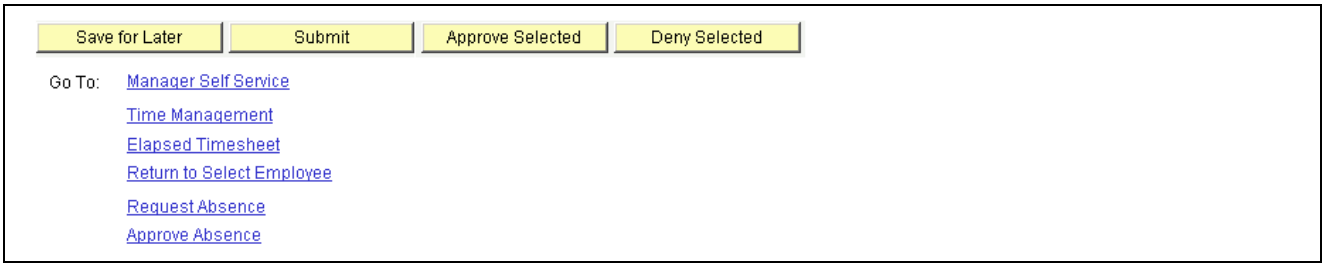
Working with Timesheets

Access the Timesheet page.

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Timesheet page – Punch example (1 of 2)



Timesheet page – Punch example (2 of 2)

The Timesheet page enables the manager to work with an employee's reported time in more detail. You can adjust entries, select some or all incidences of time needing approval and click either the Approve Selected or Deny Selected buttons.

The placement of the Comments icon on the Timesheet page depends on the type of Timesheet that is displayed, either punch or elapsed. The comment icon is in the first column of the time grid on the punch timesheet. Click it to access the Comments page. For elapsed timesheets, the comment icon is included in the Reported Time Status grid that you can access using the link below the Apply Rules button. The Reported Time Status link and grid are not displayed on punch timesheets.

The manager can navigate to the previous or next employee in the list that was generated on the Approve Reported Time page by clicking the Previous Employee or Next Employee links.

Click the Submit button to validate reported time and set the status to Needs Approval. Time that has no errors after being validated is set to *Needs Approval*. If the user is reporting more time or modifying time for an existing row that has already been processed, and has a status of Approved, then the whole day (or row) is again set to a status of *Needs Approval*.

After clicking the Approve Selected or Deny Selected buttons, the manager is transferred to a confirmation page. To return to the Timesheet page click the OK or CANCEL button.

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Reported Time that does not need approval is set to a status of *Submitted*.

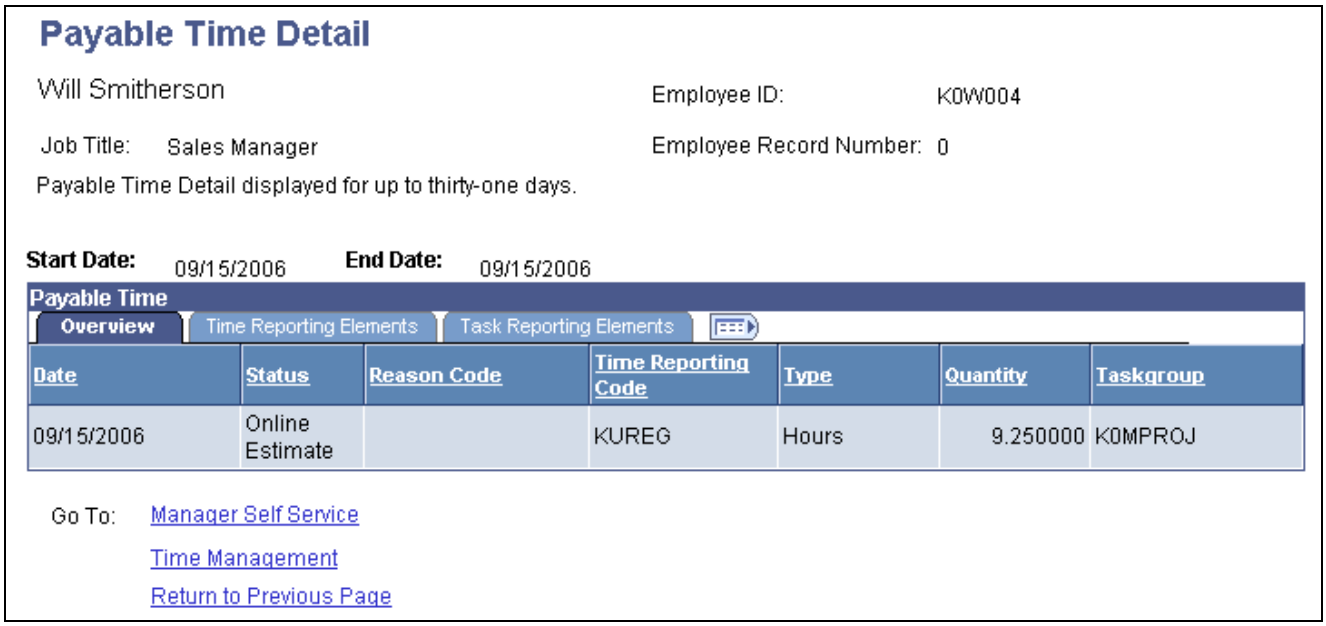
If an Absence Event cannot be entered or approved in Timesheet, use the Request Absence or Approve Absence Go To links. You cannot return to the Timesheet after you have navigated beyond the Approve Absence Request or Request Absence pages.

See Also

Chapter 14, "Understanding Payable Time," page 387

Running Online Rules and Viewing Payable Time Detail

Access the Payable Time Detail page.



Payable Time Detail page

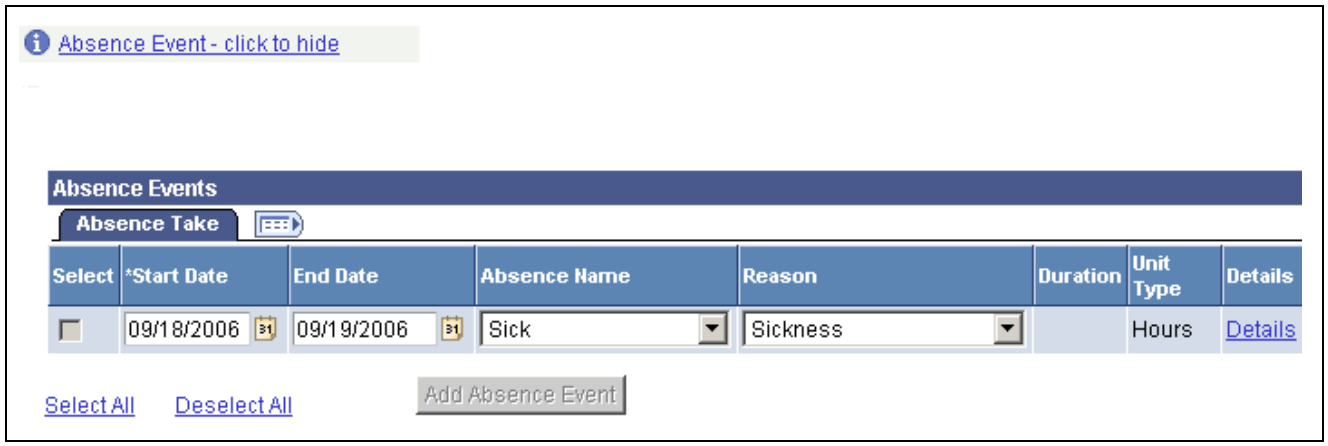
For time with a status of *Submitted* or *Approved*, click the Apply Rules button on the Timesheet page to display payable time with a status of *Online Estimate* on the Payable Time Detail page.

See Chapter 20, "Using Self-Service Components," Entering, Viewing, or Changing Employee's Time, page 563.

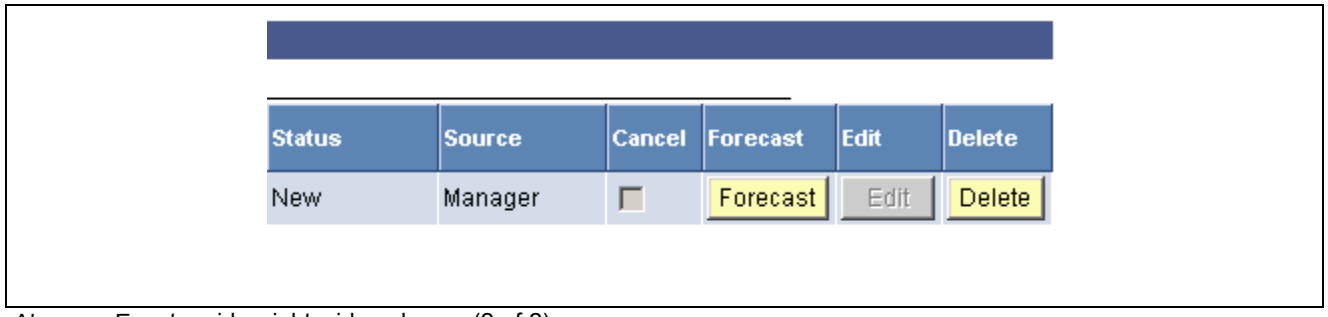
Reviewing and Entering Absence Events

Click the Absence Event link on the Timesheet page.

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Absence Events grid (1 of 2)



Absence Events grid – right–side columns (2 of 2)

The Absence Events section is collapsed by default when you access the Timesheet page.

The Absence Events grid on the Timesheet page enables the manager to review, add, change, and approve absence events.

Edit Click this button to edit, submit, cancel or forecast the absence request. The edit button is disabled when you are adding a new absence.

Note. You can edit only one absence event at a time so as to avoid confusion with absence validation messages.

Cancel This check box is enabled only when editing an absence. The event will be cancelled when you click the Save or Submit buttons. Depending on the cancellation rule defined in the Country Take component, the absence could be deleted from the database or the status could be set to cancelled.

Forecast When adding or editing an absence event, click this button to forecast the absence event information for this employee.

Note. The Forecast button is enabled only if defined in the Country Take component for the absence that is being reported. The Forecast column is not displayed if no absence events in the grid are set up to enable forecasting.

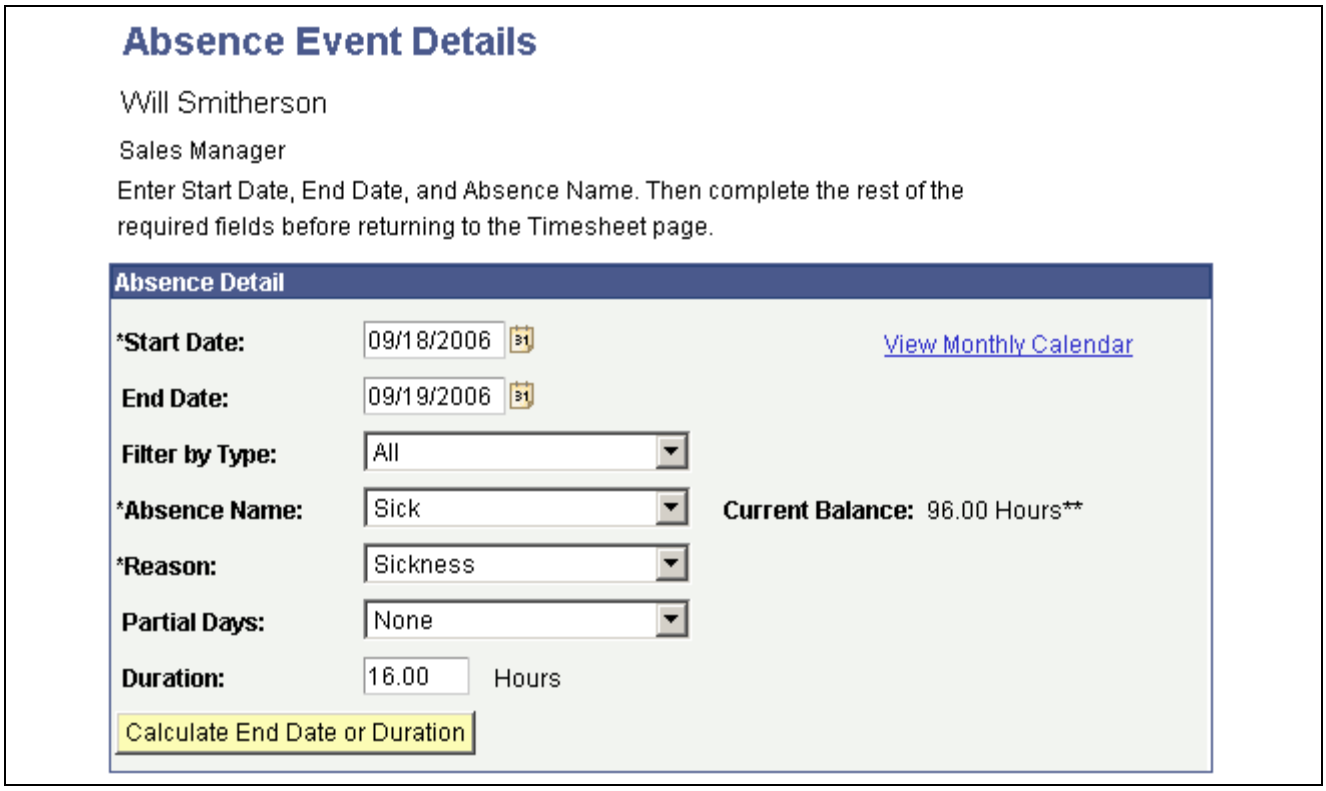
Submit Click this button to submit the entries on the Timesheet page. After submitting, you can approve the entry.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Setting Up Self Service Absence Transactions," Defining Self Service Absence Rules by Country.

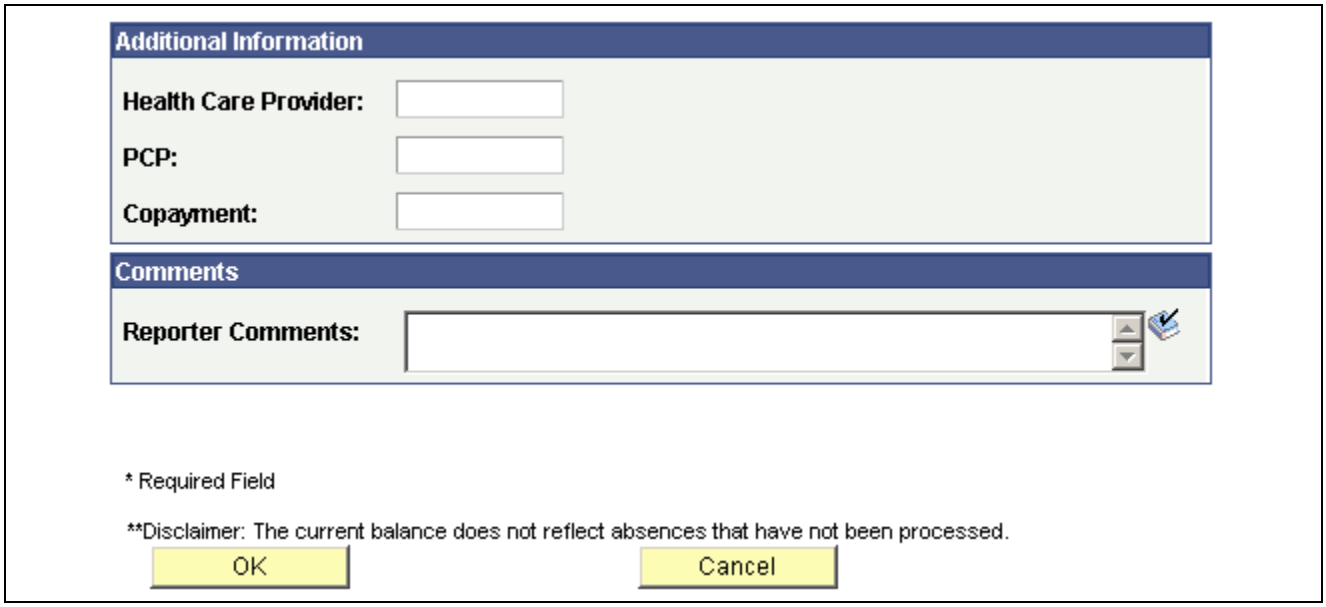
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Entering Absence Event Details

Click the Details link in the Absence Events grid to access this page.



Absence Event Details (1 of 2)



Absence Event Details (2 of 2)

This page is displayed automatically when you select an absence that requires additional information, regardless of whether the partial days options have been enabled.

The page consists of three group boxes: Absence Detail, Additional Information, and Comments.

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Absence Detail

Start Date Select the first day of the absence event. The field option defaults to the current date. If there is a break in the absence, enter each event separately. For example, if you are out sick for two days, return to work for three days, and are out sick again, enter two absence events. If the absence includes a weekend (say, Thursday to Monday), enter one absence event.

End Date Select the last day of the absence event. If you leave this field empty and the Calculate End Date option on the Country Take (setup) page is selected, the system automatically determines the end date based on the begin date, duration, and partial days options.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Setting Up Self Service Absence Transactions," Defining Self Service Absence Rules by Country.

Original Start Date Select the original start date of the absence event. Enter a date if the absence has legal or payment implications based on the original start date of the absence.

This field is visible when Display Original Begin Date is selected on the Absences page of the Country Take component.

Note. Careful consideration is needed when enabling this field in self-service. Incorrect data entered in this field might lead to incorrect eligibility calculations and payment for one or more events.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Setting Up Self Service Absence Transactions," Defining Self Service Absence Rules by Country.

Filter by Type Select the absence type. The selection you make in this field will limit or filter the selections available in the Absence Name field.

Absence Name Select the absence name from the available options. The options available depend on the selection in the Filter by Type field, the absence Takes that are enabled in the Country Take setup, and the elements for which the employee is eligible.

Note. If you change the value in the Absence Name field on this page, all existing information regarding the event is reset. The system prompts you to continue before it resets the data.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Managing Element Eligibility and Resolution".

Reason Select a reason from the available options. The reasons available depend on your selections in the previous fields. Absence reasons are linked to the Absence Name (Take) through the Absence Take Type.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Defining Absence Elements," Defining Absence Types and Reasons.

Partial Days Specify which days of the absence event are partial days.

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If the Calculate End Date or Duration option is enabled on the Absence (setup) page, and the Unit Type is *Hours*, the system does consider any partial hours or half-day entries that are entered in this group box when it calculates the end date or duration.

For example, an employee has a work schedule of 8 hours per day, Monday through Friday. The employee reports an absence from Monday, January 8, 2007 through Wednesday, January 10, 2007. Then employee takes a half day off on Monday and full days off for the rest of the absence.

Example 1: The Country Take set up is defined as follows:

- Unit Type = *Hours*
- Allow Partial Days = Selected
- Partial Days = *Partial Hours*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007*
- End Date = *January 10, 2007*
- Partial Days = *Start Day Only*
- Start Day Hours = *4*

Example 2: The Country Take set up is defined as follows:

- Unit Type = *Hours*
- Allow Partial Days = Selected
- Partial Days = *Half Days*

With these settings, to correctly enter the absence data the employee should report:

- Start Date = *January 8, 2007*
- End Date = *January 10, 2007*
- Partial Days = *Start Day Only*
- Start Day is Half Day = Selected

Warning! If the absence unit type is defined in days in the Country Take setup, we do not recommend using partial days options.

Note. Data that you enter in the following fields is used in the absence calculation process only if the data is referenced by your absence formulas.

The available options in the Partial Days field when the absence is calculated in days include:

- *All Days*
- *End Day Only*
- *None*

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- *Start Day Only*
- *Start and End Days*

Depending on the option that you select, up to two check boxes appear that allow you to specify which days of the absence event are half days. Select the check boxes that are appropriate for the absence event.

Duration

Enter Duration by days or hours. You do not have to enter Duration if the Calculate Duration button is enabled on the Absence (setup) page. The system calculates the duration of the absence in hours or days when you click the Calculate End Date or Duration button.

The behavior of this field depends on the settings on the Absence (setup) page. The value is automatically calculated if the Calculate End Date option is selected.

- If the absence is measured in days or hours, the system automatically calculates the duration when you enter the begin date and end date.
- If you want to calculate the end date based on a duration, the system calculates the end date after you enter the begin date and duration and click the Calculate End Date button.

Calculate End Date or Duration

Click this button to have the system calculate the end date of an absence event based on the entries in the Start Date and Duration fields, or to calculate the Duration based on entries in the Start Date and End Date fields.

Note. When the Calculate End Date and Calculate Duration options are both selected on the Date Rules page of the Country Take component, one of these two options is entered in the If both entered recalculate field. This ensures that when an absence event is reported with values entered in both the Duration and End Date fields, only one of the fields is recalculated when the Calculate End Date or Duration button is clicked.

Additional Information

The fields that are displayed in this group box depend on how your organization sets up self service for Absence Management during the implementation process.

Comments

The Requestor Comments field enables the employee to enter free form text related to the absence request that becomes part of the record and is visible throughout the approval process. Comments display on the Absence Details page.

OK

Click this button to have the system perform validations regarding required fields and issue error messages if information is missing. Also, if Partial Days options are used incorrectly, error messages are displayed indicating which data needs must be corrected before the Timesheet page is displayed.

Cancel

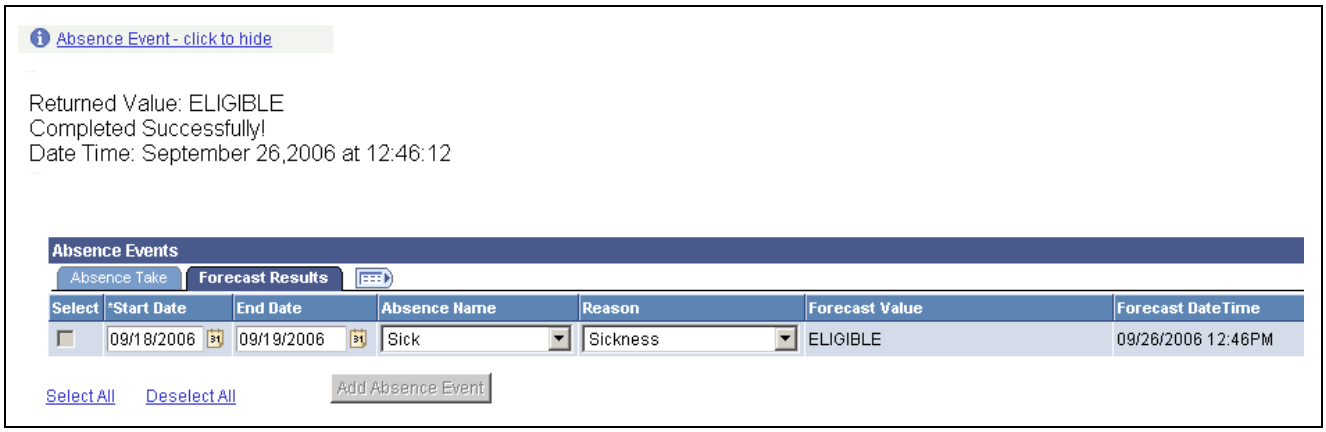
Click this button to discard any modifications that you made.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Entering and Approving Self Service Absence Requests," Requesting Absence on Behalf of an Employee.

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Forecasting Absence Events

The Forecast Results tab is displayed in the Absence Events grid after the absence event Forecast process is completed.



Absence Forecasting Message and Forecast Results tab

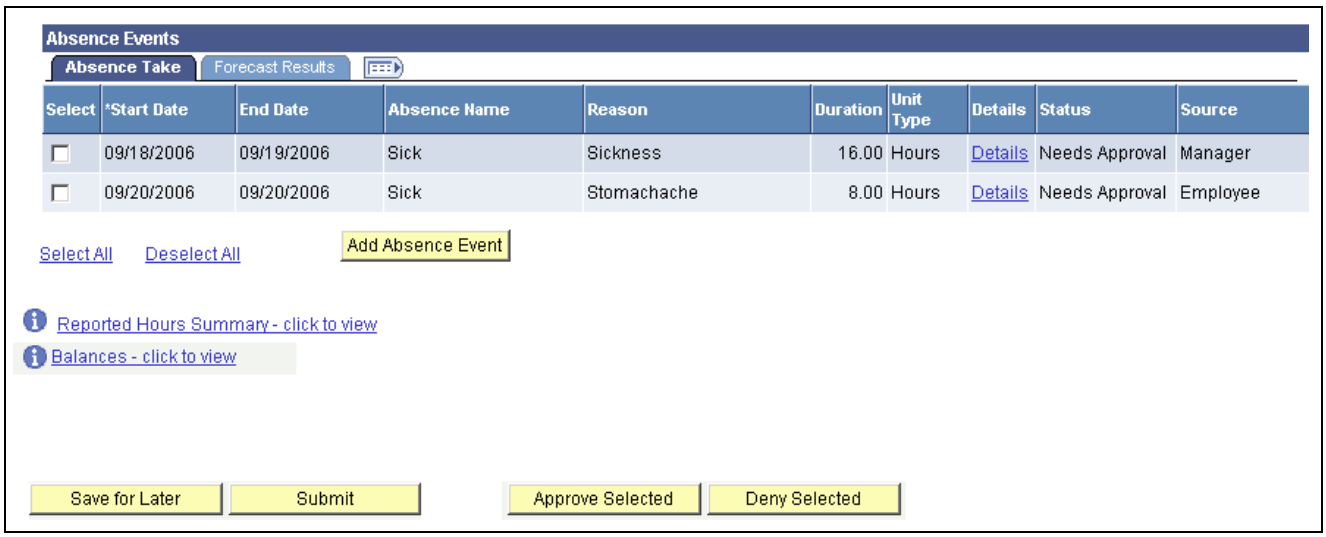
After the Forecast process is completed, a message is displayed beneath the Absence Event link to indicate the absence forecast status and time stamp. The Forecast Results tab displays the Forecast Value returned for each of the absence events. Click the Forecast Details link to review the list of returned values for each absence event.

Depending on the Country Take configuration, some absences may require forecasting to submit for approval. Depending on the Forecast Value returned, some absences may not be eligible to be submitted if they do not meet the forecasting eligibility criteria defined in the Country Take component.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Entering Absences," Reviewing Absence Entitlement Balance Forecast Results.

Approving Absence Events

Access the Absence grid with events awaiting approval:



Absence Events for Approval

Select the Absences that require approval. Absences with a status of *Needs Approval*, *Error*, and *Denied* can be approved.

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You can approve multiple absence events in the Absence Events grid on the manager's Timesheet. If at least one of the events requires forecasting before approval, a validation error is issued that requires you to run the Forecast process. If multiple events are forecasted, a message is displayed indicating that forecasting completed successfully. Click the Forecast Details link that is displayed in the Forecast Results tab to verify the forecast results for each of the events.

Absence Source

The Source column of the Absence Events grid displays the source of entry of the absence event. Depending on the entry source, some events can be modified on the Timesheet page. This table lists the combinations of entry source, the label displayed in the Source column, and indicates in which applications the event can be modified:

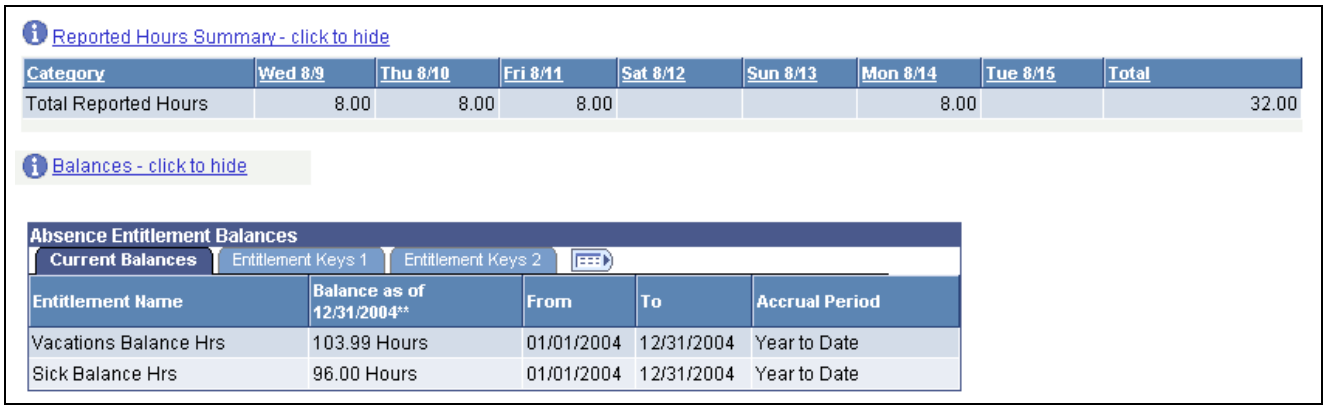
Source of Entry	Label Displayed	Can be modified in . . .
Absence Event Entry	Administrator	Absence Event Entry
Time and Labor	Time and Labor	Absence Event Entry
Third Party	Third Party	Absence Event Entry Third Party
Employee Absence Self Service	Employee	Absence Event Entry Employee Timesheet Manager Timesheet
Manager Absence Self Service	Manager	Employee Timesheet Absence Event Entry Manager Timesheet
Employee Timesheet	Employee	Absence Event Entry Employee Timesheet Manager Timesheet
Manager Timesheet	Manager	Absence Event Entry Employee Timesheet Manager Timesheet

Note. On Timesheets, you can approve absence events that are entered using Employee and Manager Absence Self-service pages or Employee and Manager Timesheets only if they are defined to allow entry in Time and Labor in the Country Take component.

Viewing Reported Hours Summary and Absence Entitlement Balances

Click the links for Reported Hours Summary link or Balances link on the Timesheet page to view these grids:

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Reported Hours Summary - click to hide

Category	Wed 8/9	Thu 8/10	Fri 8/11	Sat 8/12	Sun 8/13	Mon 8/14	Tue 8/15	Total
Total Reported Hours	8.00	8.00	8.00			8.00		32.00

Balances - click to hide

Absence Entitlement Balances

Current Balances | Entitlement Keys 1 | Entitlement Keys 2

Entitlement Name	Balance as of 12/31/2004**	From	To	Accrual Period
Vacations Balance Hrs	103.99 Hours	01/01/2004	12/31/2004	Year to Date
Sick Balance Hrs	96.00 Hours	01/01/2004	12/31/2004	Year to Date

Reported Hours Summary and Balances grids

The Absence Entitlement Balances grid displays Absence Entitlement balances as of the last time the absence process was completed and finalized.

If the employee is enrolled in compensatory or leave plans, those balances are displayed in a separate grid.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Entering Absences," Forecasting Absence Entitlement Balance During Absence Entry.

Approving Payable Time

This section provides an overview of approving payable time and discusses how to:

- Approve payable time.
- Approve payable time details.
- Adjust reported time.
- Approve time for a group of employees.

Understanding Approval of Payable Time

Approval of payable time is required if one or more of these conditions apply:

- The Approve Payable Time check box is selected on the employee's workgroup setup page.
- The TRC Approval option field is set to *Payable Time* or *Reported and Payable Time* on the TRC set up page.
- The user has written a rule that identifies the employee's payable time as time that must be approved.

You can view and approve payable time on the Approve Payable Time – Approve Time for Time Reporters or the Approve Payable Time pages. The Approve Payable Time – Approve Time for Time Reporter page displays all time reporters dependant on entries specified in the Employee Selection Criteria and date range fields and who have time with a Payable Status of *Needs Approval.* The Approve Payable Time page displays time entries for an individual time reporter.

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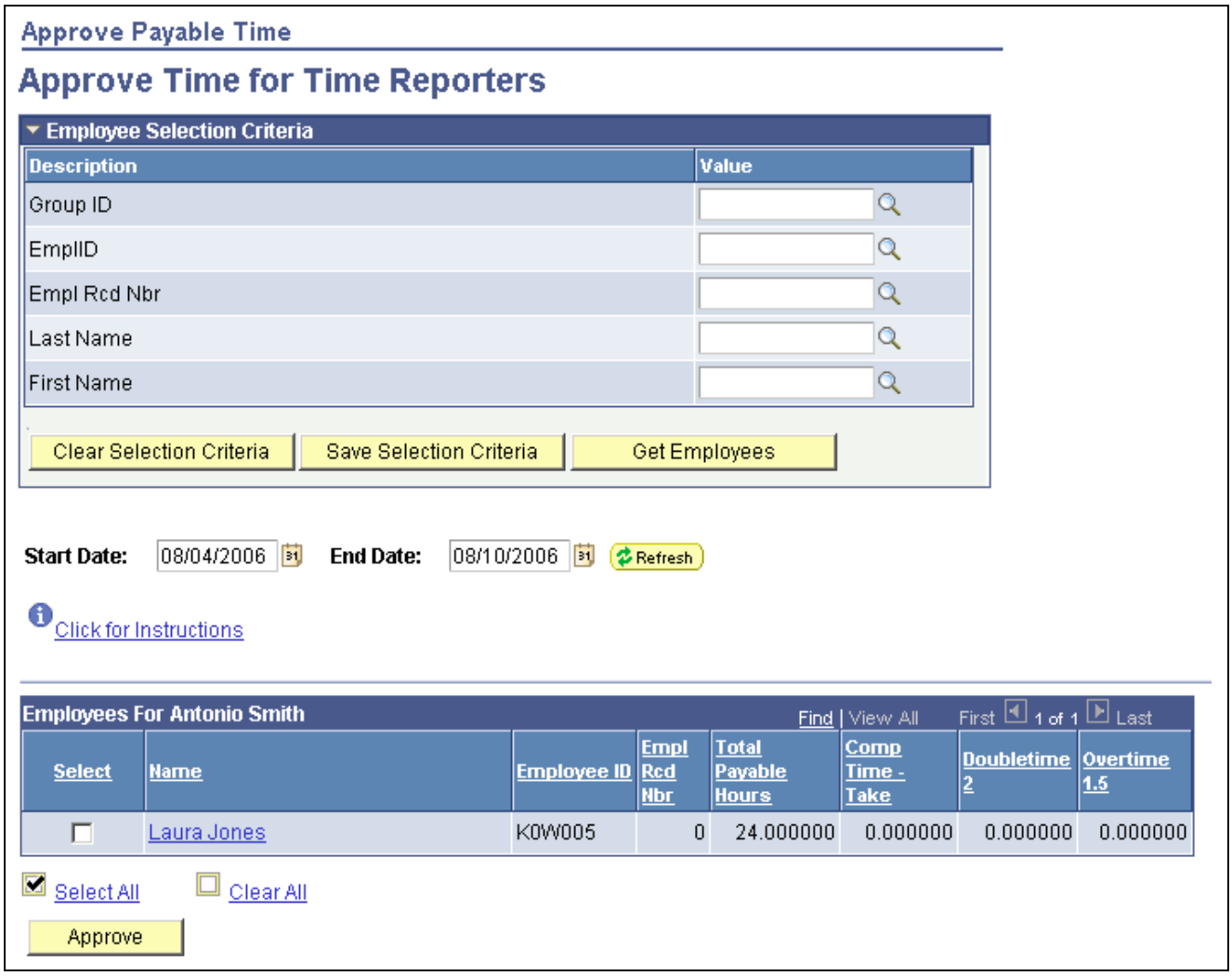
Pages Used to Approve Time

Page Name	Object Name	Navigation	Usage
Approve Payable Time - Approve Time for Time Reporters	TL_MNG_APRV_SRCH	• Time and Labor, Approve Time, Payable Time, Approve Payable Time - Approve Time for Time Reporters • Manager Self Service, Time Management, Approve Time and Exceptions, Payable Time, Approve Payable Time - Approve Time for Time Reporters	Approve time for one or more time reporters that are displayed using the Employee Selection Criteria and date range fields.
Approve Payable Time	TL_MNG_GRP_APPROVE	Click time reporter's Name link to view details of the entry.	View and approve separate time entries for an individual time reporter.
Adjust Reported Time	TL_RPTD_PCH or TL_RPTD_ELP	Click the Adjust Reported Time link.	Adjust reported time entries.
Time Reporting Comments	TL_TR_COMMENTS	Click the Comments icon.	View or add comments to individual time entries.
Request Batch Approval Process	TL_APPRV_RUNCTL	Time and Labor, Approve Time, Request Batch Approval Process, Request Batch Approval Process	Approve time for a group of employees during a batch process.

Approving Payable Time

Access the Approve Payable Time - Approve Time for Time Reporters page.

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Approve Payable Time - Approve Time for Time Reporters page

Note. Time must be processed through Time Administration and have a payable status of Needs Approval.

The Approve Payable Time – Approve Time for Time Reporter page offers manager the capability to refine their search including groups, employee IDs, a certain date range, or many other criteria, or simply to return all the employees for whom they have approval authority and who have payable time that needs approval. After the manager enters the search criteria and clicks the Get Employees button, the result list displays below the Employee Search Criteria and Date fields.

The manager can then select one or more employee rows and click the Approve button to approve the payable time. Alternatively, the manager can click the employee name link to view and approve each employee's payable time entries.

Employee Grid

The columns Select, Name and Total Payable Hours are always displayed. The fields selected in the Include in List column on the Manager Search Options page are also displayed.

See Chapter 20, "Using Self-Service Components," Setting Up User Preferences, page 556.

Select Select this check box next to the time reporter's name to approve payable time.

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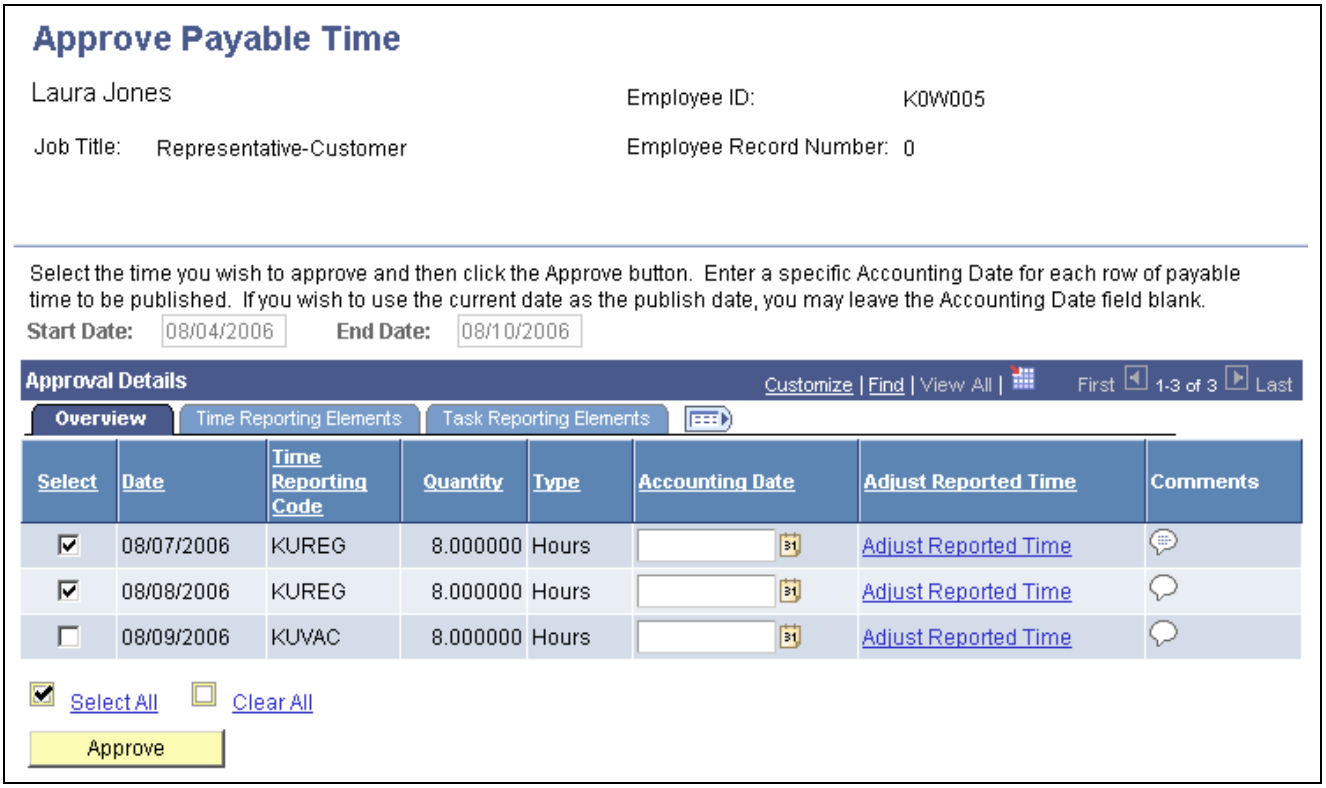
Name	Click on the individual time reporter's link to view details of their time entry from the Approve Payable Time page.
Total Payable Hours	Displays the total number of related hours that require approval. Each row of the grid displays the Total Payable Hours for a time reporter. In Time and Labor, 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.
Select All, Clear All	Click Select All to select all the time reporters displayed for approval. Click Clear All to deselect all rows.
Approve	Click this button to approve the selected time reporters' payable time.

See Also

Chapter 14, "Understanding Payable Time," page 387

Approving Payable Time Details

Access the Approve Payable Time page.



Approve Payable Time page

Select the check box in the Select column next to the rows that you want to approve. The system displays all data for the payable time in the appropriate field. If no data exists for the field, it is blank.

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Select the Time Reporting Elements or Task Reporting Elements tabs to view additional details about the time that needs approval.

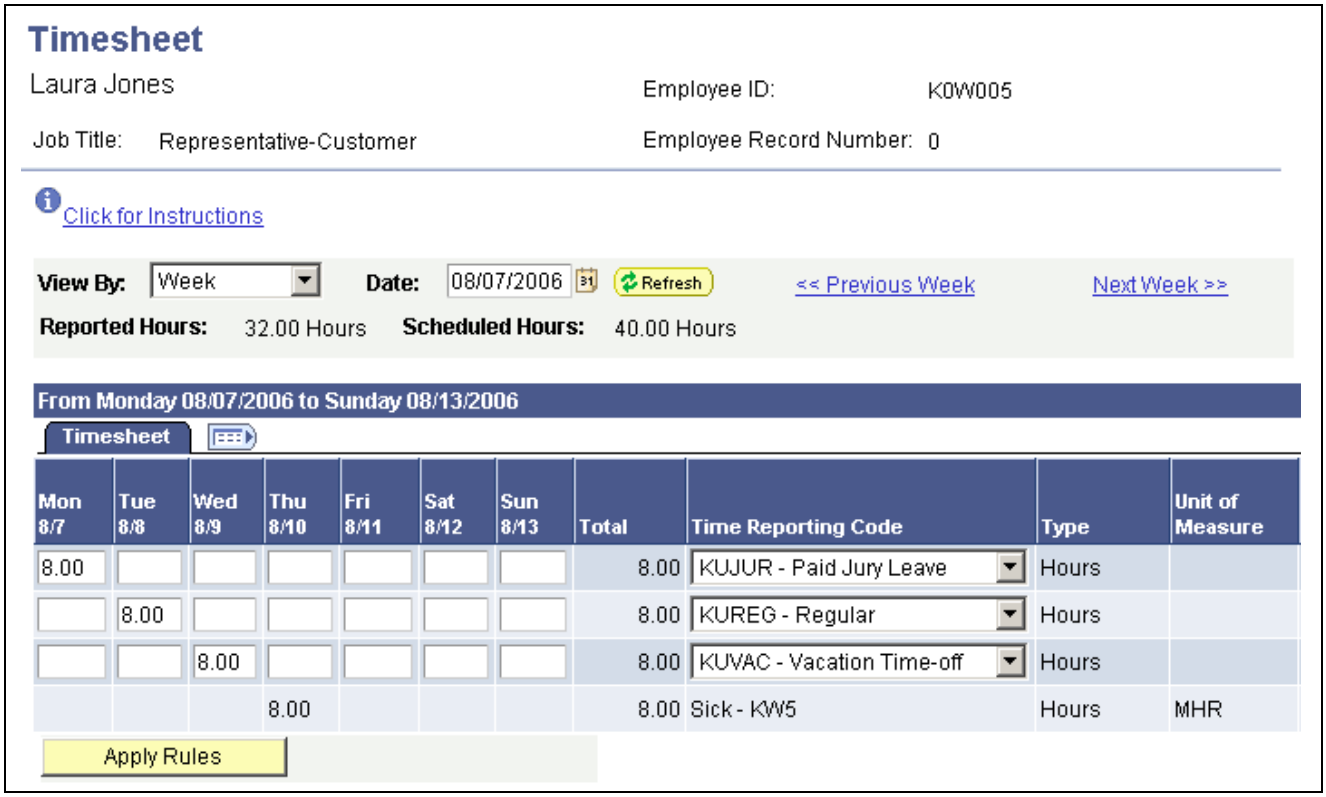
Adjust Reported Time Click the this link to display the Timesheet page that enables you to adjust the time reporter's reported time.

Comments Click the icon in this column to add or view a comment related to an incidence of time. Click the Save button on the Comments page, and then the OK button to confirm the save and display the Approve Payable Time page.

Note. The appearance of the icon in this column changes if a comment is attached to that row.

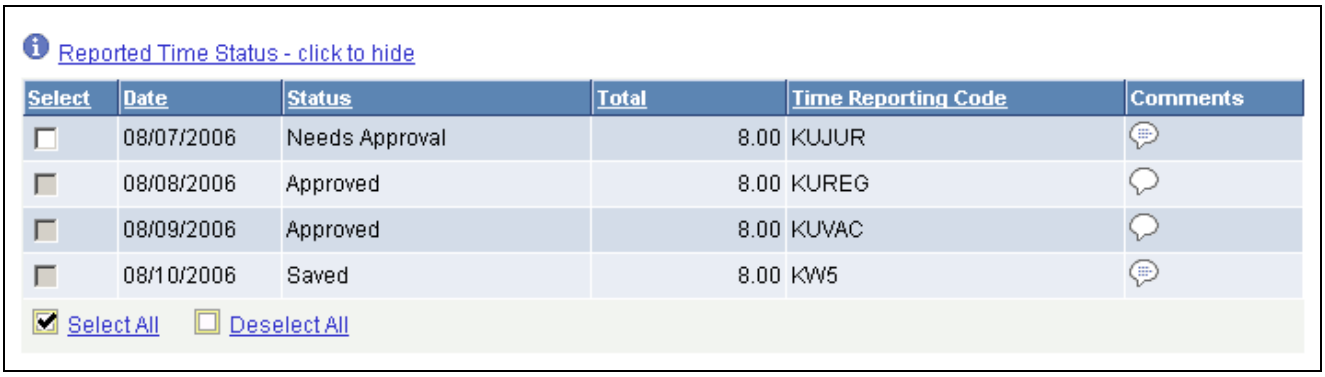
Adjusting Reported Time

Access the Timesheet page.



Timesheet page – adjust reported time (1 of 2)

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Timesheet page – adjust reported time (2 of 2)

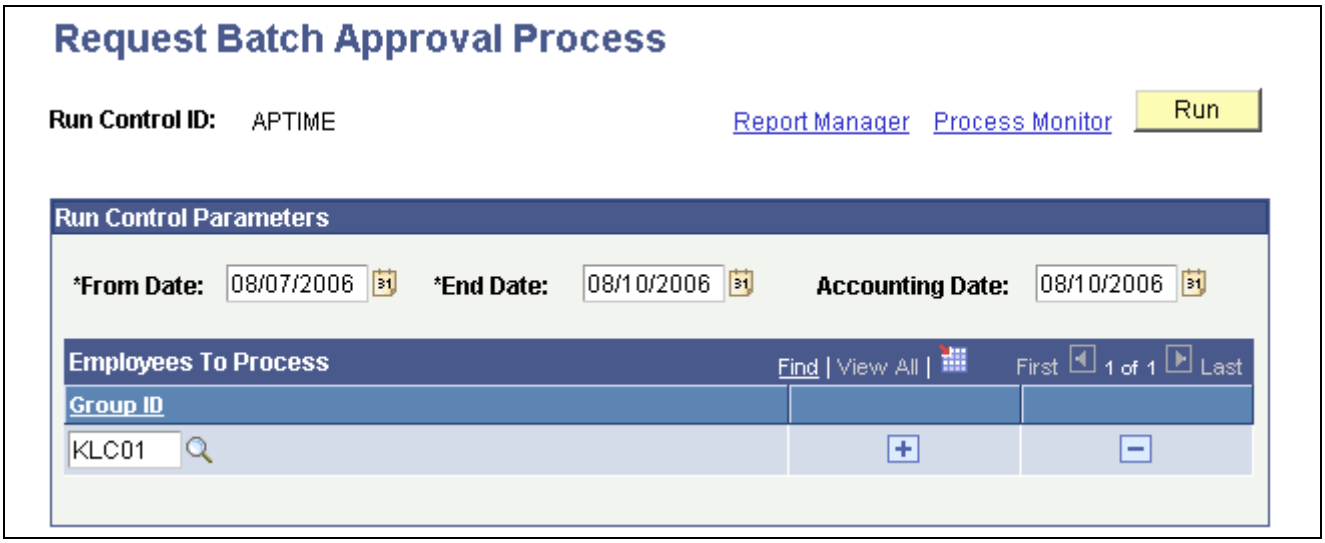
This page is the same as the Timesheet page. When time is adjusted using the Timesheet page, the reported time will need to be resubmitted and the Time Administration process run again. This will turn the adjusted reported time into payable time that can then be approved.

See Also

Chapter 20, "Using Self-Service Components," Reporting Time, page 561

Approving Time for a Group of Employees

Access the Request Batch Approval Process page.



Request Batch Approval Process page

From Date and **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.

Accounting Date — Defaults to current date. Can be changed to synchronize with a date within an accounting period used in Project Costing and PeopleSoft General Ledger.

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 Nbr — Displays the employee record number for the EmplID. If EmplID is blank, this field is blank.

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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.
- Filter exceptions.
- View manage exception details.
- View exceptions history.

Understanding Exceptions

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 *High* severity level must be resolved or allowed, in order for the reported time associated with the exception to 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. In addition to the standard exceptions delivered with the system, you can define your own exceptions in accordance with your organization's time management policies.

Resolving or Allowing Exceptions

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. In addition to viewing exceptions on the Manage Exceptions page, time managers have the options to allow exceptions or to use the Clean Up Exceptions button to resolve exceptions, after the reported time for non-setup related exceptions has been adjusted.

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 Timesheet or Rapid Time entry pages, 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, correct the time or setup value and then run Time Administration. For example, a setup-related exception may be generated if time reporters report time using a new TRC that has not been added to their TRC program. Because the TRC is not in the program, an exception is generated stating "TRC not in the TRC Program." You must either correct the reported time or add the TRC to the TRC program. A non-setup or reported time exception could occur if time reporters report task profiles that are not valid for their taskgroup. The generated exception is "Task Profile not in Taskgroup."

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If a *High* severity 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* or *Medium* will become payable time, but they also remain in the Exceptions Table until the exception is resolved or allowed.

The Allow Exceptions functionality enables you to allow an exception and generate payable time without having to resolve it. This is useful for organizations that use informational exceptions. For example, consider exceptions that are created in the retail industry because a time reporter is approaching an overtime limit. The time manager could be notified that the time reporter is approaching the limit but decides to allow this exception during the holiday peak season.

Exception Statuses

PeopleSoft also provides a status indicator for the exception. Statuses help you work with the exceptions. Possible exception statuses are *Unresolved, Resolved,* and *Allowed*. When an exception is created, the status of the exception is *Unresolved*. If you modify time, the system checks the Exceptions Table to determine if the modification occurs within the date range of a pre-existing exception. When Time Validation and Time Administration run again, if the exception condition no longer exists, then the status changes to *Resolved*.

Exceptions are created with the *Unresolved* status. If the exception is generated for reported time, the manager or administrator changes the reported time and clicks the Clean up Exception button to see if exceptions are addressed. If the exception is recreated, the status is again *Unresolved*. If exceptions are not recreated, they will be deleted or retained with the status of *Resolved*, based on the archive configuration in the exception definition setup. The same is true for exceptions that are generated for payable time.

Exception History

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 Exception 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 Exception 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 Exception check box selected, (Archive), the exception appears when you either *Resolve* or *Allow* the exception.

Note. Most exceptions delivered with the system have a Severity Level of *High* and are not allowable. You must resolve these 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 Chapter 4, "Setting Up Basic Tables," Defining Exceptions, page 68.

See Chapter 17, "Managing Time," Viewing Exceptions History, page 486.

Defining Exception Conditions

You can define all the conditions that require managers to review reported time before it becomes payable time. Examples include an employee missing a punch, punching in late, working more than eight hours of overtime, or being tardy ten times in the last month. Focus on the elements of reported time that are important to your organization.

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Validating Time and Creating Exceptions

Reported time entered through Time and Labor time entry pages is validated online (before Time Administration processing). Time that is reported by a Rapid Time entry, Mass Time entry, GP Absence entry, or by 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.

Low Severity Delivered Exceptions

Two exceptions are delivered that have a low severity. Both are related to the integration of Time and Labor and Absence Management. Exception TLX01700, "Full absence and reported time" occurs when a full day absence exists and there is reported time. Exception TLX01710, "Partial Absence and Punch Time" is generated if punch time with a source code SCH exists for the days of a partial absence and the workgroup is configured for Create Partial Work hours. This is a warning that the regeneration of reported time did not adjust the punch scheduled time.

Time Administration and Exception Resolution

After you have resolved the issues by adjusting the reported time or setup values, you can run the Time Administration process. The Time Administration process will call the Resolution Exception process and clean up any exceptions that have been resolved and create payable time for that time. The Resolution Exception process 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* (Time Validation Elapsed) or *TVP* (Time Validation Punch). Once the exceptions have been resolved, Time Administration then created payable time for that 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.

Clean Up Exceptions Button

If you have made an adjustment to reported time and want to verify the exception has been fixed before running Time Administration, click on the "Clean Up Exceptions" button on the Manage Exceptions page. The Clean Up Exceptions button also calls the Resolution Exception process and will resolve any non-setup related exceptions where the time has been corrected. You will still need to run Time Administration to create payable time, but the Clean Up Exceptions button is a tool for you to verify that the adjustment you made to the reported time will actually resolve the exception. For example, a time reporter enters an invalid value in the Task Profile field, and then you correct the value on the Timesheet page. Rather than waiting until your Time Administration process runs again, if you want to verify that the correction you made to the Task Profile is the right one and will actually fix the exception, click the Clean Up Exceptions button on the Manage Exceptions. This will clean up and resolve the exception if the adjustment you made to the Task Profile is valid. Then when your Time Administration process runs again, it will create the appropriate payable time.

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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. You can either run the Time Administration process again for that time reporter, or using the Manage Exceptions page, click the Clean up Exceptions button to verify the adjustment you made will actually resolve the exception, 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 Exceptions	TL_MNG_EXCEPT_PNL1	Manager Self Service, Time Management, Approve Time and Exceptions, Exceptions, Manage Exceptions Time and Labor, View Exceptions and Attendance, Exceptions, Manage Exceptions	Review, allow, or clean up exceptions. Up to 100 exceptions display per page.
Review Exceptions History	TL_AUD_EXCEPT_PNL	Time and Labor, View Exceptions and Attendance, Exceptions History	View exceptions that have been resolved or allowed.

See Also

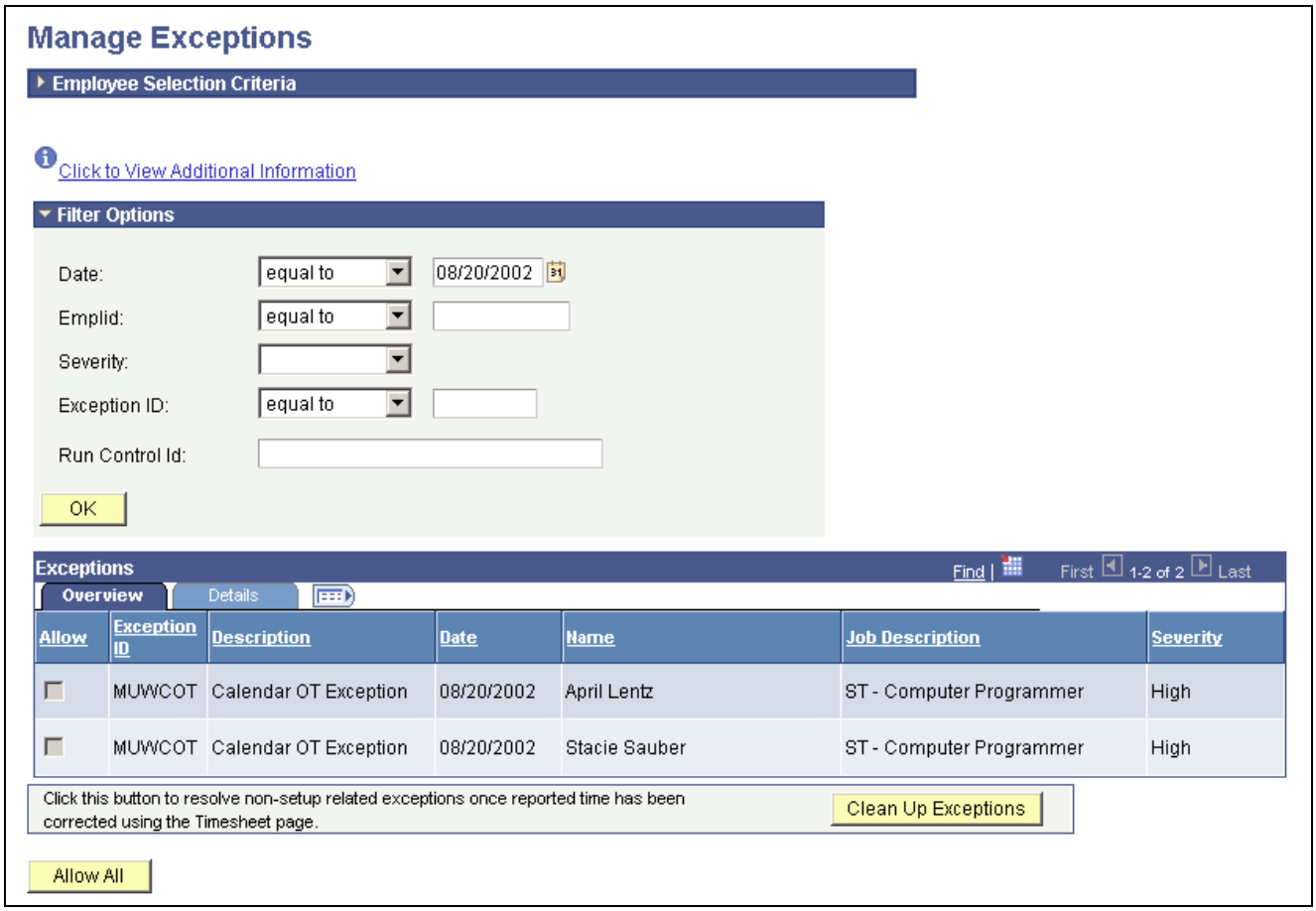
Chapter 4, “Setting Up Basic Tables,” Defining Exceptions, page 68

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Managing Exceptions

Access the Manage Exceptions page.

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Manage Exceptions page

Note. You may view and allow exceptions with a status of *Unresolved* using this page. System delivered exceptions have a *High* severity level are not allowable. To view exceptions that have already been resolved or allowed, use the Exceptions History page.

Employee Selection Criteria Enter values and click the Get Employees button to control which employee exceptions the system displays to approve or resolve.

Filter Options Expand this grid to further control which exceptions the system displays.

Filter Options

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 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.*

Run Control ID Enter the value of the run control that was used when the exception was created.

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Exceptions Grid

Allow Select the check box in this column to select an individual time reporter's exception to be allowed for that date.

Note. If all the exceptions displayed on the page are not allowable, then the Allow column and Allow All button are hidden.

Exception ID Displays the Exception ID code that was delivered with the system or that you defined using the Define Exceptions page. Click the Details tab to view the Exception Information details of the exception.

Description Description of the exception.

Date Displays the date of the reported time that caused the exception.

Name Employee's name for the related 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* .The system does create payable time for reported time with an exception severity of *Low or Medium.*

Clean Up Exceptions Click to resolve all exceptions created by time reporting validations (not setup-related exceptions).

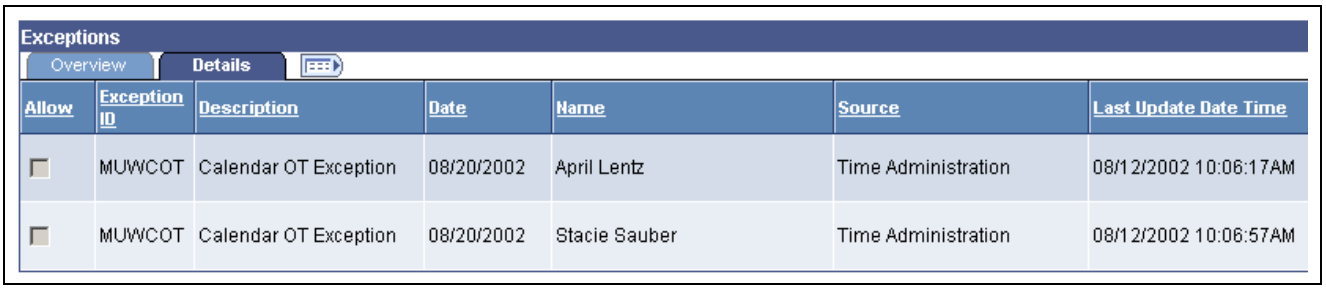
Allow All Click to select all the exceptions for the group to be allowed. This selects the Allow check boxes for all the exceptions displayed on the page. If you click this button again, the system clears the Allow check boxes. Once you have selected the exceptions you want to allow, click the Save button to allow the exceptions. The exceptions can then be processed through Time Administration to create payable time.

Note. If all the exceptions displayed on the page are not allowable, then the Allow column and Allow All button are hidden.

Save Once you have selected the exceptions you want to allow, click the Save button to allow the exceptions. The exceptions can now be processed through Time Administration to create payable time.

Viewing Manage Exception Details

Click the Details tab.



Manage Exceptions Details page

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Exception ID The exception can 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.

Last Update Date Time Displays the date and time the exception was resolved or allowed.

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."

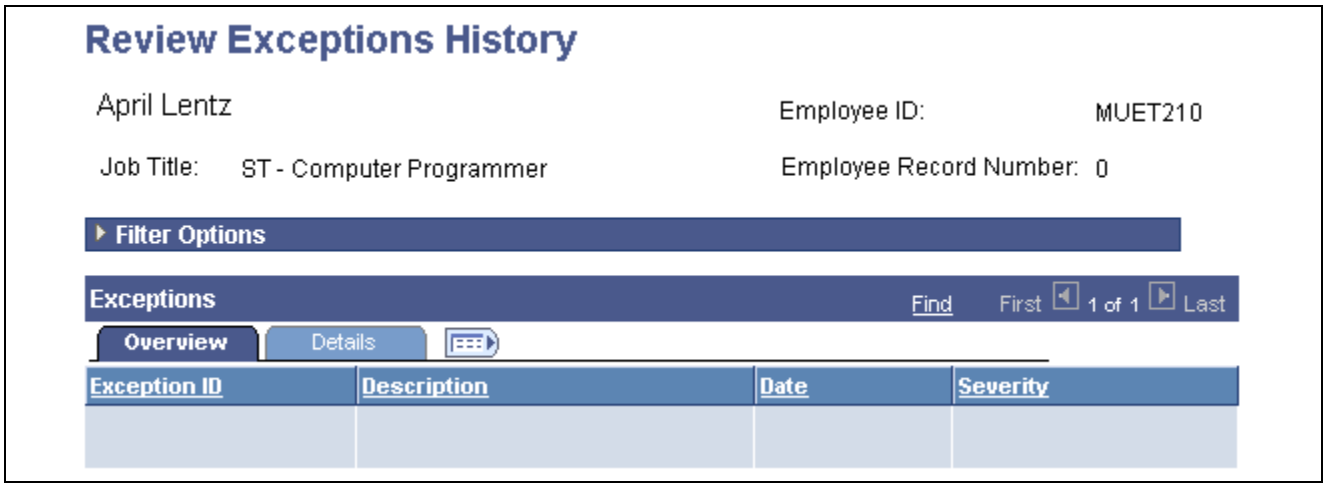
Exception Description Click this link to view the long description for the exception.

Comments Enter any comments about how or why the exception was allowed or resolved.

Note. The remaining fields that display on the Details tab are the fields that have been selected on the Manager Search Options page.

Viewing Exceptions History

Access the Review Exceptions History page.



Review Exceptions History page

Exception ID Click the link that appears in this column to view details of the resolved or allowed exception.

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* exceptions, use the Manage Exceptions page.

Severity Displays the severity of the exception: *High, , Medium* or *Low.* The system will not create payable time or send the time to payroll if the exception severity is *High* until it is either allowed or resolved by the user. However, the system will create payable time for reported time with an exception severities of *Medium* or *Low.*

The Exception ID link displays the same information as the Manage Exceptions Details tab.

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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.

The Filter Options page functions the same as the Filter Options on the Manage Exceptions page. See Manage Exceptions , Filter Options for a description of these fields.

See Also

Appendix A, "Exceptions and Validations," page 659

Adjusting Time

This section 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 Time and Labor nor is the time sent to 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 Time and Labor systems in sync, you use 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 sent to payroll again. This feature enables you to keep 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 the payroll system and has a payable status of *Diluted* or *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 Payable Status, and TRC 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 send the time to payroll. Time and Labor does publish the payable time to your Project Costing application. If compensatory time is reported, the system will not process it or adjust the time reporter's compensatory time balance the next time the Time Administration process is run for that time reporter. Use the Weekly page to make these adjustments.

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:

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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

Chapter 14, "Understanding Payable Time," Payable Time Status and Reason Codes, page 389

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Integrating with Project Costing, page 530

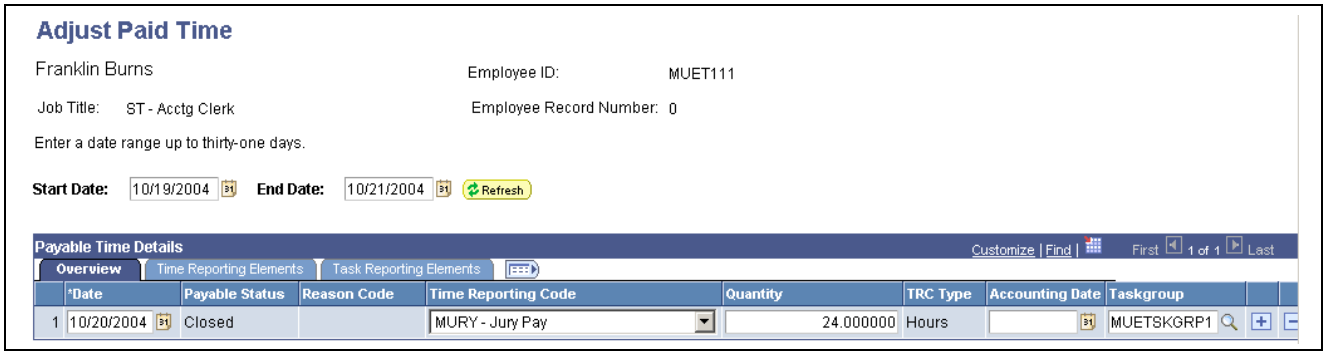
Appendix A, "Exceptions and Validations," page 659

Pages Used to Adjust Time

Page Name	Object Name	Navigation	Usage
Adjust Paid Time	TL_MNG_PAY_DET_PNL	Time and Labor, Report Time, Adjust Paid Time	Make *Record Only* adjustments for individual employees or for non-employees.

Making Record Only Adjustments

Access the Adjust Paid Time page.



Adjust Paid Time 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. Also, the system will not adjust compensatory time balances for changes or additions of reported compensatory time.

Date Enter the date you want to adjust for the time that was paid.

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Payable Status Displays the payable status for the reported time: *Closed, Diluted, Distributed* or *Rejected*.

Note. For rows of payable time that have a status of *Rejected*, a *Close* check box is displayed. When you select this check box, you prevent the row from being loaded to payroll. After you select the *Close* check box and save the page, the payable status remains *Rejected*. (Behind the scenes, the Payroll Request Number is set to 1.)

Reason Code The reason code associated with the payable status.

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.

Accounting Date Enter a date to synchronize with a date within an accounting period used in Project Costing and General Ledger.

Taskgroup Select the taskgroup for the time you want to adjust. The system displays the appropriate task elements on the Task Reporting Elements tab, depending on your selection.

Note. Absence rows are not displayed on this page.

Time Reporting Elements

The columns that are displayed are based on the selections made on the employee time reporting template.

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.

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Note. Rules Only type TRC's do not show up on the time reporting pages, but they will display on the Adjust Paid Time page. Rules Only TRC's are TRC's that have been specified for Rules processing use only, and not used for reporting time.

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 Project Costing.

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 sent 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

The columns that are displayed are based on the selections made on the task template.

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, PC Business Unit, Resource Type, Resource Category, Resource Sub Category, Perf Meas Business Unit, Activity ID, Account Code, User Field 1-5, Job Code Select an item for the time being adjusted for each applicable element.

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 Project Costing.

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Publish Date	This is the date Time and Labor published actual costs to Project Costing 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.
Accounting Date	Defaults to current date. Can be changed to synchronize with a date within an accounting period used in Project Costing and PeopleSoft General Ledger.
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 Time and Labor, the rate is a positively reported rate that's sent 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

Chapter 14, "Understanding Payable Time," page 387

Chapter 7, "Defining Task Reporting Requirements," Creating Task Templates, page 139

Chapter 4, "Setting Up Basic Tables," Understanding Time and Labor Implementation, page 15

Auditing Time

This section provides an overview of auditing time and discusses how to:

- View reported time.
- View changes made to the reported time.
- View unprocessed reported time.
- View unprocessed payable time.
- Use public queries to audit time.

Understanding Auditing Time

Three Time and Labor components and a number of public queries exit to audit and track time. The components include Reported Time Audit, Unprocessed Reported Time, and Unprocessed Payable Time. This section provides an overview of these components and lists the delivered public queries for auditing time.

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Reported Time Audit

The Reported Time Audit component contains pages that display time that exists in the Reported Time tables and in the Audit tables, which include all entries and changes that have occurred to the time. Audit pages enable you to view punch and elapsed time for historical purposes and to track the changes that have occurred to the originally reported time. On the main Reported Time Audit pages, the system displays reported time that is *current*. A History link is displayed if changes were made to the originally reported time; otherwise the link is unavailable. The pages include the Time Reporting Elements and Task Reporting Elements tabs that contain additional information about the reported time. These pages eliminate the need to create reports to track changes to time.

Unprocessed Reported Time

The Unprocessed Reported Time component identifies time that is still in Reported Time for these reasons:

- Time needs approval
- Time has not been submitted (or is in a Saved status).
- Time has been denied.
- Exceptions exist for the time entered.
- The total payable time is less than the sum of submitted or approved time.

Unprocessed Payable Time

The Unprocessed Payable Time component identifies time with these statuses:

- Approved – Goes to Payroll
- Needs Approval
- Estimated – Ready for Payroll
- Sent to Payroll (if PNA is the pay system)
- Taken – Used by Payroll (if GP is the pay system)
- Rejected by Payroll

Queries to Track Time

These queries enable you to identify time that was entered through Mass Time or Rapid Time but is not in Reported Time.

Query Name	Description
TL_Unproc_Rapid_Pch	Unprocessed Rapid Punch Time
TL_Unproc_Rapid_Elp	Unprocessed Rapid Elapsed Time
TL_Unproc_Mass_Pch	Unprocessed Mass Punch Time
TL_Unproc_Mass_Elp	Unprocessed Mass Elapsed Time

See Enterprise PeopleTools PeopleBook,: PeopleSoft Query, Creating and Running Simple Queries

See Chapter 16, “Using Time Collection Devices,” Viewing and Resolving TCD Errors, page 451.

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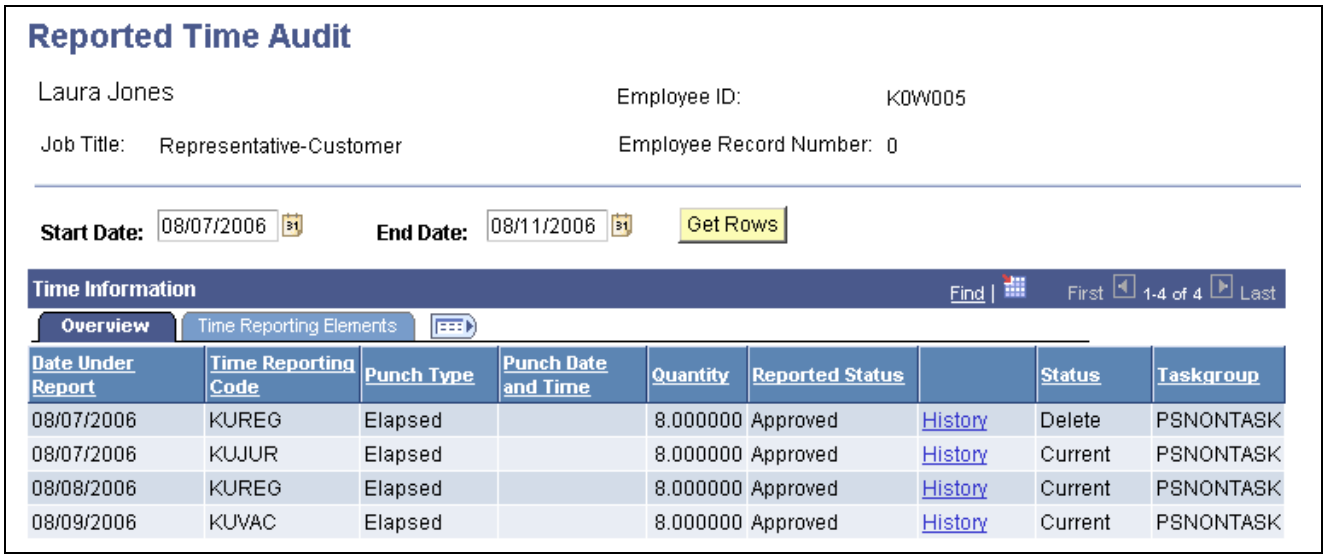
Pages Used to Audit Time

Page Name	Object Name	Navigation	Usage
Reported Time Audit	TL_AUD_RPTTIME_PNL	Time and Labor, View Time, Reported Time Audit, Reported Time Audit	View current reported punch and elapsed time.
Reported Time Audit - History	TL_AUDIT_RPT_PNL	Click the History link on the Reported Time Audit page.	View changes made to the reported elapsed or punch time selected.
Unprocessed Reported Time	TL_UNPROCESS_SUMM	Time and Labor, View Unprocessed Time, Unprocessed Reported Time, Unprocessed Reported Time	Identify time that has not gotten to Payable Time, either because Time Administration process has not been run, the time has not been approved, there are exceptions with the time or due to some rule processing, the amount of time in the Reported Time tables does not match the amount of time in the Payable Time tables.
Unprocessed Payable Time	TL_UNPROCESS_SUMM	Time and Labor, View Unprocessed Time, Unprocessed Payable Time, Unprocessed Payable Time	Identify time that has not been paid. Employees who have time that is in the following status' will display on this page: (Status: Estimated, Approved, Needs Approval, Rejected by Payroll, Sent to Payroll for PNA or Taken by Payroll for GP.

Viewing Reported Time

Access the Reported Time Audit page.

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Date Under Report	Time Reporting Code	Punch Type	Punch Date and Time	Quantity	Reported Status		Status	Taskgroup
08/07/2006	KUREG	Elapsed		8.000000	Approved	History	Delete	PSNONTASK
08/07/2006	KUJUR	Elapsed		8.000000	Approved	History	Current	PSNONTASK
08/08/2006	KUREG	Elapsed		8.000000	Approved	History	Current	PSNONTASK
08/09/2006	KUVAC	Elapsed		8.000000	Approved	History	Current	PSNONTASK

Reported Time Audit page

Overview

Start Date and **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 from the start to the end date.

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.

Time Reporting Code — Displays the Time Reporting Code for the reported time that has a status of either *Current* or *Delete*.

Quantity — Displays the quantity for the Time Reporting Code for elapsed reported time that has a status of *Current* or *Delete*, or the duration for matched punches for punch reported time.

Reported Status — Values that appear in this column include *Saved*, *Denied*, *Submitted*, *Needs Approval*, and *Approved*.

History — Click this link 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 the link is available, then changes have occurred to the time; click the link to view them.

Status — Values that appear in this column are *Current* or *Delete.*. 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 *Delete*, the system displays the time that was deleted (through the Weekly Elapsed Time page).

Taskgroup — Displays the taskgroup for the reported time.

Time Reporting Elements

Select the Time Reporting Elements tab to view these fields:

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Punch Type Displays the type of punch for the reported time. If the reported time is elapsed time, *Elapsed* is displayed in this column.

Punch Date and Time Displays the date and time the punch was reported.

Currency Code, Country, State, Locality, Billable, and Rate Code Displays this field information for the reported time that was originally reported then changed.

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.

Override Reason Code Displays the code for the reason the reported time was overridden.

Badge ID Displays the Badge ID number for the reported time if you require a badge number to be used when reporting time.

Time Collection Device ID Displays the ID of the time collection device to which the time was reported.

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 Time Reporter Data pages.

Reported Time Source Displays the source of where the reported time was generated, such as Time Administration or Time Validation.

Task Reporting Elements

This tab is displayed if the time reporter is associated with a taskgroup.

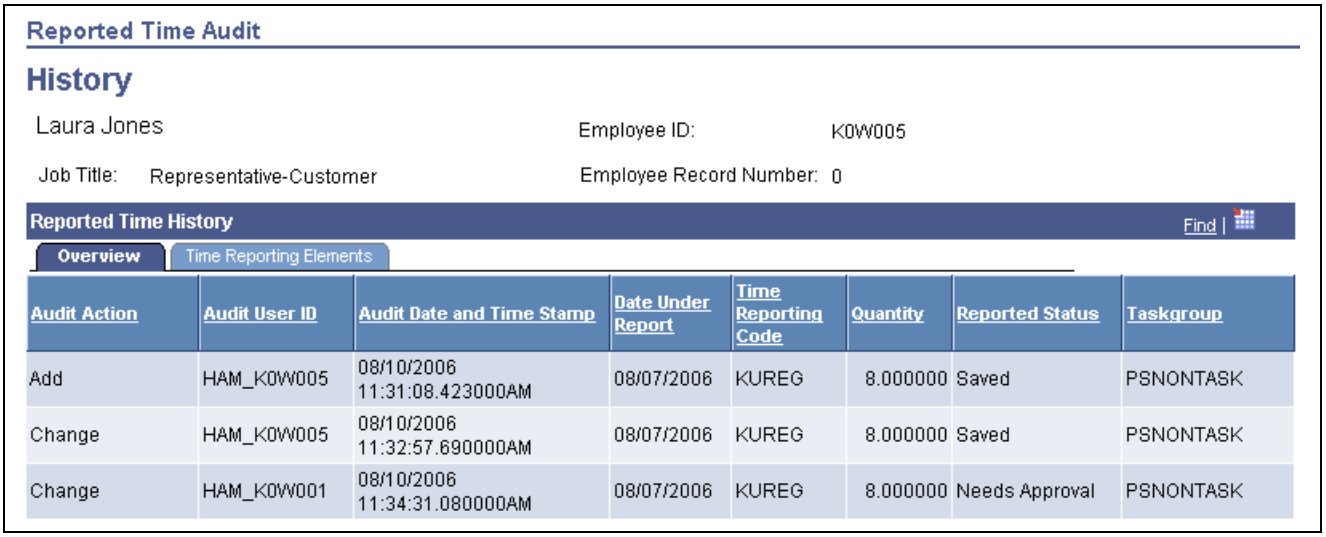
Time Reporting Code Displays the TRC for reported time.

Customer Displays the customer.

Combo Code Displays the combo code for the reported time.

Viewing Changes Made to Reported Time

Access the Reported Time Audit - History page.



Reported Time Audit – History page

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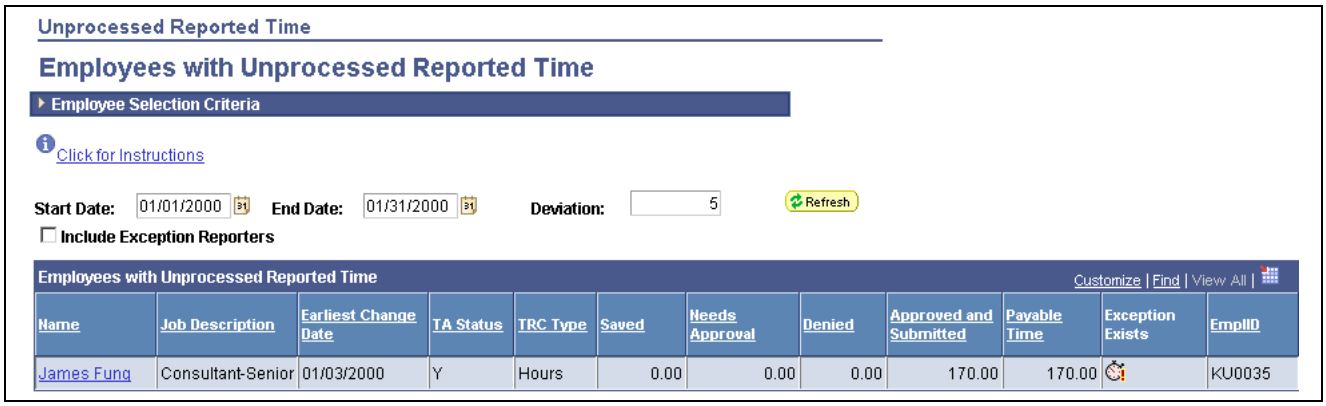
Audit Action Displays the Audit Action for the reported time: *Add*, when time is reported but not approved *Change*, when the reported time is approved, *Delete*, *Key Change Old Key*, and *Key Change New Key*.

Date Under Report, Time Reporting Code, Quantity, Reported Status, Taskgroup A row is inserted with this information when the time is approved.

The Time Reporting Elements tab displays the same information as the Time Reporting Elements tab on the Reported Time Audit page.

Viewing Unprocessed Reported Time

Access the Unprocessed Reported Time page.



Unprocessed Reported Time

Name Click the link in this column to view details for that row.

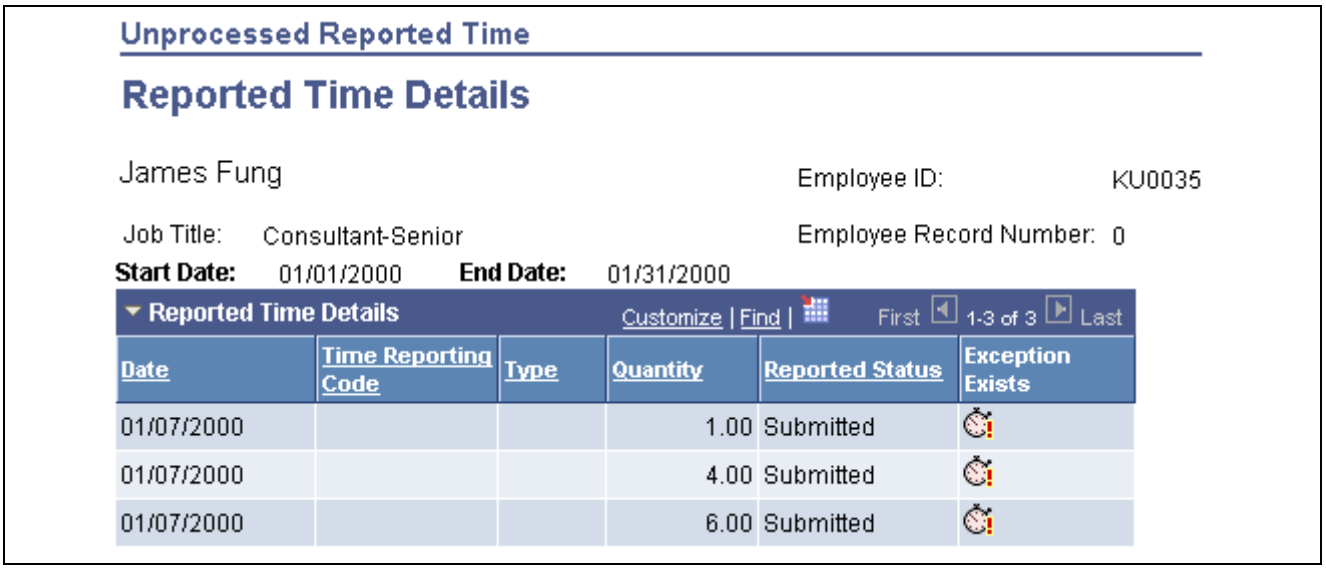
Start Date and End Date The date range cannot extend beyond 31 days.

Deviation Enter an acceptable deviation amount for the calculation between reported and payable time.

Include Exception Reporters Typically exception time reporters have no hours in Reported Time but many hours of Payable Time. The default is to exclude exception time reporters.

Click the Name link to view details. The detail page will not display any Task Elements, Chartfields or Time Reporting Elements. The detail page displays by day and by status the employee's time for Reported Time that has not gotten to Payable Time. This includes reported time with a status of Needs Approval (NA), Saved (SV), or Denied (DN) and any time with exceptions. If there is no time in those statuses, a message is displayed indicating that the Time Administration process must be run to move approved or submitted time to Payable Time.

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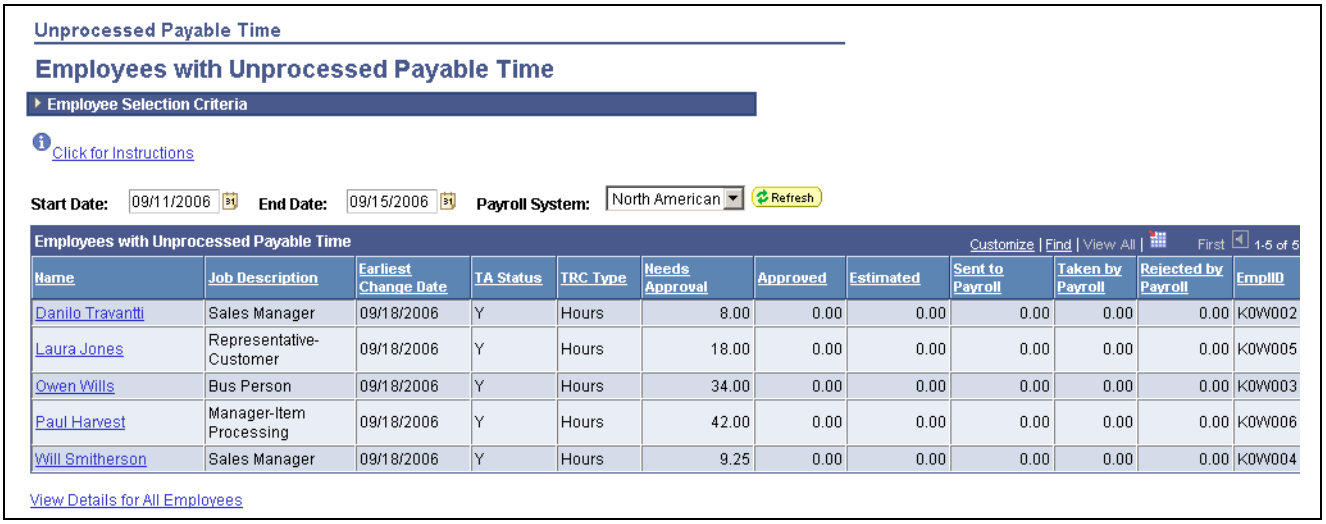
Unprocessed Reported Time Details page

Reported Status This column will display these statuses: *Needs Approval*, *Saved,* and *Denied*.

Exception Exists An icon is displayed for rows where exceptions exist.

Viewing Unprocessed Payable Time

Access the Unprocessed Payable Time page.

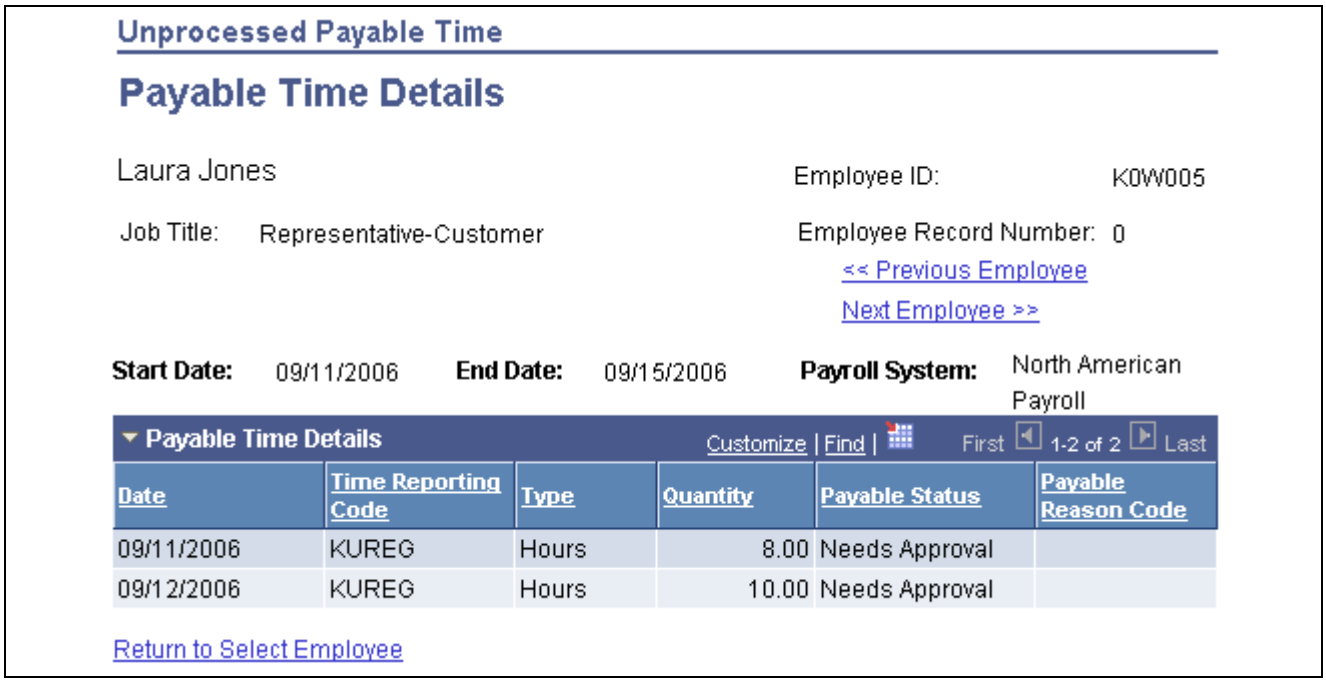


Unprocessed Payable Time page

Name Click the link to access the detail for that row.

View Details for All Employees Click this link to display unprocessed payable time for all employees. This page that is displayed lists each instance of unprocessed payable time for each employee. Click the download icon next to the Find link on the group box title bar to save this information in spreadsheet format for additional analysis and reporting.

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Unprocessed Payable Time Details page

This page displays all rows in payable time that have not been processed by payroll. The data is sorted by Date and then by Time Reporting Code. Payable time with these status codes is displayed on this page:

- Estimated
- Approved
- Needs Approval
- Rejected by Payroll
- Sent to Payroll (for Payroll for North America)
- Taken by Payroll (for Global Payroll)

Previous Employee and **Next Employee** — Click these links to display information for the previous or next employee listed in Employees with Unprocessed Payable Time grid on the Unprocessed Payable Time page.

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.

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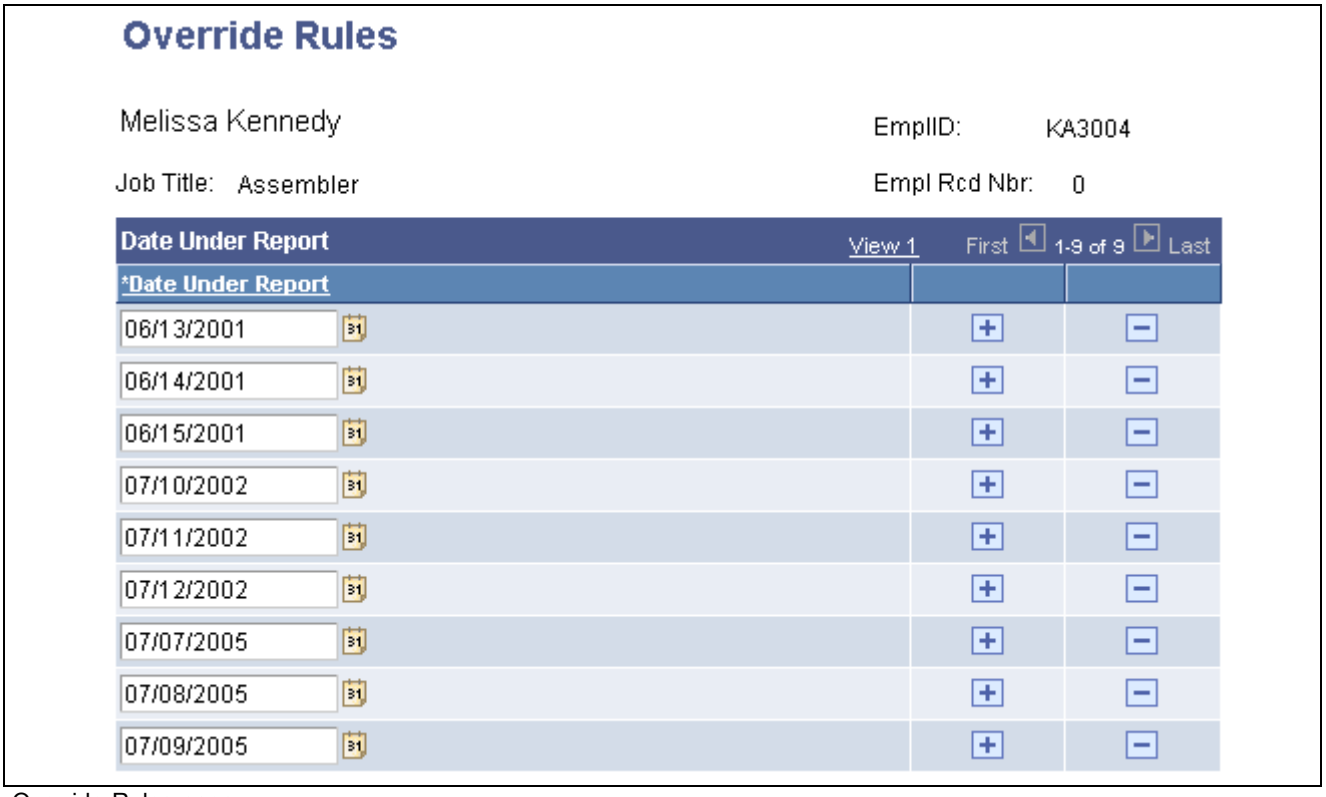
Note. You must enter time exactly how you want your time reporter to get paid, including overtime hours, using one of the time reporting pages when you want to override rules for a day.

Page Used to Override Rules for a Day

Page Name	Object Name	Navigation	Usage
Override Rules	TL_RULES_OVR_PAGE	Time and Labor, Process Time, Override Rules	Stop Time Administration from processing any rules against the time for the day.

Stopping Rules Processing for a Day

Access the Override Rules page.



Override Rules page

Date Under Report Enter the date of the day for which you want Time Administration to bypass rules processing.

See Also

Appendix A, "Exceptions and Validations," page 659

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

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CHAPTER 18

Integrating with Payroll Applications

Time and Labor transmits the payable time created by the Time Administration process to a payroll application, such as Payroll for North America or 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 Project Costing and other applications.

This chapter provides an overview of payroll integration and discusses how to:

- Integrate Time and Labor and Payroll for North America.
- Integrate Time and Labor and Global Payroll.
- Integrate absence event data.

See Also

Chapter 14, "Understanding Payable Time," page 387

Overview of Payroll Integration

Before using your payroll system to pay employees for time reported in 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 Time and Labor, your payroll system, and PeopleSoft Human Resources.

Configuration requirements vary by payroll system and are described later in this section.

After the setup is complete, payroll personnel can include payable time, created by the Time Administration process, in pay runs. Depending on how you configure Time and Labor, payroll personnel can distribute the resulting costs back to payable time for other products to use. This chapter discusses the relationship between payable time created in Time and Labor, your payroll application, and other applications that can use cost data.

Note. Payable time is available to third-party applications; however, PeopleSoft does not deliver a process for publishing to third-party applications.

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 Payroll for North America and Global Payroll are as follows:

1. In Time and Labor, a user runs the Time Administration process to create payable time for the workgroups with time reporters to pay.

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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 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.

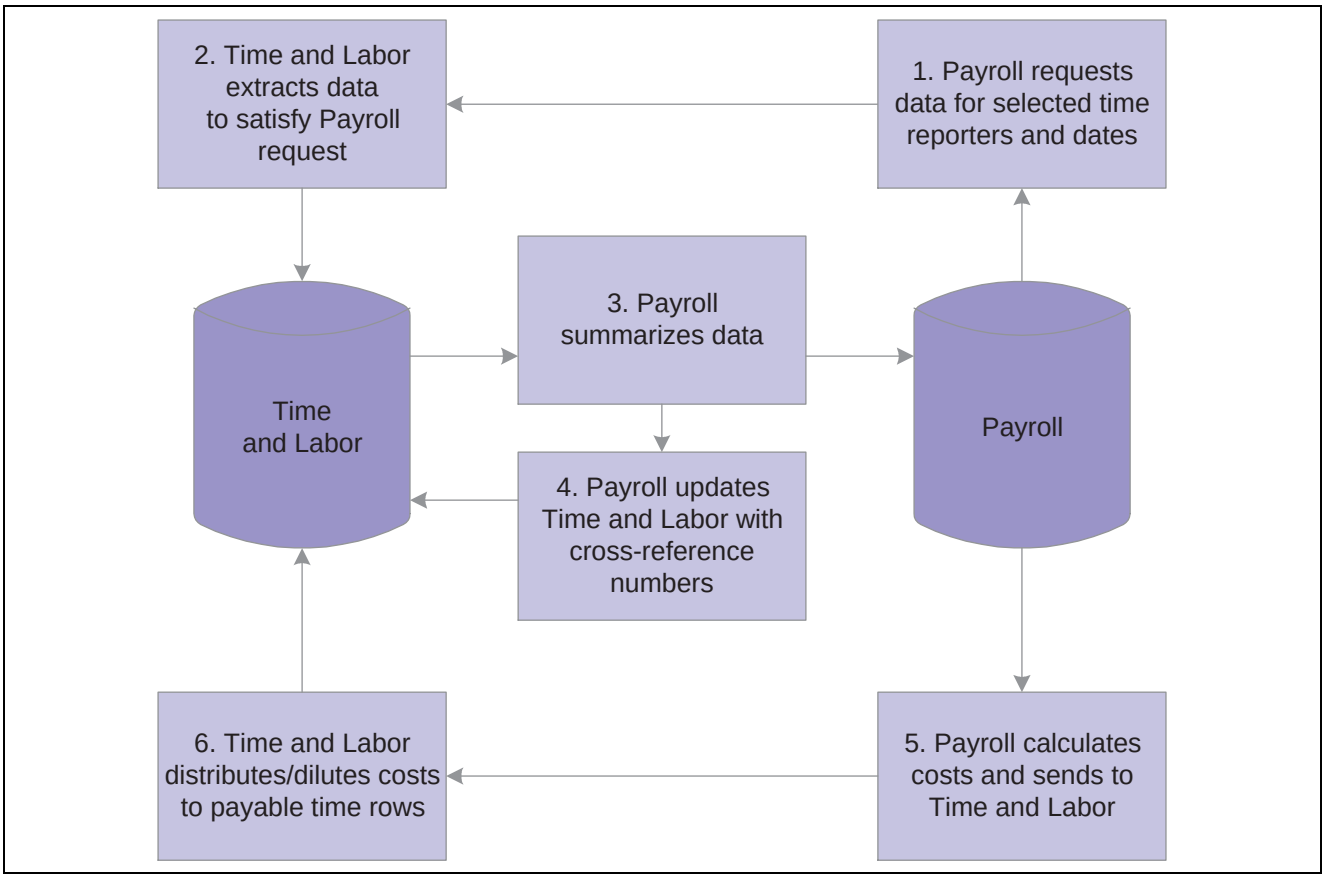
5. The payroll system sends cost data generated by the pay run back to Time and Labor.

6. The Labor Distribution and Dilution processes are invoked in 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 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 Detail page of the Time and Labor self-service component. The following diagram illustrates the process flow.

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Process flow when Time and Labor is integrated with a payroll application

See Also

Chapter 14, "Understanding Payable Time," page 387

Chapter 20, "Using Self-Service Components," page 547

Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," page 585

Labor Distribution and Dilution

After a pay run is complete, payroll costs associated with time that originated in 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 Time and Labor that you can select on the Pay 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 are not tracking time at the task level, costs are allocated to the TRCs to which time was reported.

- Labor distribution and dilution.

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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, 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 as follows.

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 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

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Date	Hours	Rate	TRC	Project	Cost
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 is proportionate to the number of hours worked.

Labor Distribution Rules

Labor distribution rules are:

- 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 status is set to *Closed* and the associated reason code is Not Distributed (NDS), (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).

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- 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.

See Chapter 14, "Understanding Payable Time," page 387.

Integrating Time and Labor and Payroll for North America

This section provides an overview of integrating Time and Labor and Payroll for North America, and discusses how to:

- Configure Time and Labor for use with Payroll for North America.
- Prepare Time and Labor data for Payroll for North America.
- Load Time and Labor data.
- Run the payroll process.
- Reverse or adjust a paycheck.
- Extract costs after a pay run.
- Adjust payable time.
- Refresh data.
- Correct errors generated during the load and extract processes.

Processing Overview

This section describes the steps involved in preparing for and running a payroll when Time and Labor is integrated with Payroll for North America.

To prepare for and run the payroll:

1. Configure Time and Labor for use with Payroll for North America.
2. Run the Time Administration process in Time and Labor to create payable time for the time reporters to be paid.
3. Load payable time created by the Time Administration process into Payroll for North America.
4. Run the payroll process and confirm the pay run.
5. Extract data from payroll and send to Time and Labor.

   The Extract process triggers the Labor Distribution and Labor Dilution processes if you've enabled these features in Time and Labor.

Steps 1 and 2 are the steps you perform in Time and Labor. The other interactions are initiated through Payroll for North America.

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Configuring Time and Labor for Use with Payroll for North America

Before you can use Time and Labor with Payroll for North America, you must configure both systems appropriately. You must also select options on the Installation table and set up employee job data in the Administer Workforce business process of PeopleSoft Human Resources.

This section discusses how to:

- Configure Time and Labor.
- Configure Human Resources.
- Configure the Installation table.

Configuring Time and Labor

To configure Time and Labor for integration with Payroll for North America:

1. On the Pay System page, select the distribution features to use for Payroll for North America.

   By default, Labor Distribution is selected and Labor Dilution is not.

   See Chapter 4, "Setting Up Basic Tables," Payroll System Options, page 42.

2. On the TRC1 page, map each time reporting code to the appropriate earnings code defined in 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 Pay 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 Payroll for North America.

   See Chapter 6, "Establishing Time Reporting Codes," Defining and Mapping Time Reporting Codes (TRCs), page 103.

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.

   Payroll for North America does not create paysheets for non-employees.

   See Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206.

4. On the TL Installation page, select the appropriate settings in the TL/ NA Payroll Options group box.

   See Chapter 4, "Setting Up Basic Tables," Setting Up System Defaults and Loading Dates, page 26.

Configuring Human Resources

To configure PeopleSoft Human Resources for integration of Time and Labor with Payroll for North America:

1. For each employee, ensure the Payroll System field on the Job Data - Payroll page is set to *Payroll for North America.*
2. Set the Employee Type field on the Job Data - Payroll page to *E* (exception hourly) or *H* (hourly).

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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,* 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 Project Costing, but don't flow through Payroll for North America to your general ledger application.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Increasing the Workforce," Entering Payroll Processing Data.

Configuring the Installation Table

Select the Time and Labor and Payroll for North America paysheet options on the Product Specific page of the Installation Table component (INSTALLATION_TBL).

Use this information to determine your settings:

- Change Final Check, Change Online Check, or Change Reversal Adjustments options.

  We recommend that you do not select these options because they control whether users can make paysheet changes to data that is retrieved from Time and Labor. If you select these options, any changes made directly to the paysheets aren't transmitted back to Time and Labor.

- Load in Preliminary Calc (load in preliminary calculations) option.

  The Pay Calculation process uses the value of the Load in Preliminary Calc field to determine whether to load new available time (additional time that was worked before the job change but not previously entered on paysheets):

  - If you select this check box, the system loads all valid available time to the new paysheets, including new available time.
  - If you clear this check box, the process does not load any new available time to paysheets.

Note. If an employee had a Job data change that caused paysheets to be rebuilt, the preliminary Pay Calculation process attempts to reload all valid time and rejects time that is no longer valid as a result of the job change. This is true regardless of the setting of the Load in Preliminary Calc field. As a result, some new time might be loaded for employees who had a Job data change, even when this option is not selected on the Installation table.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Integrating with PeopleSoft Enterprise Time and Labor," Setting Up the Interface with Time and Labor

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. 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.

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See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Launching the Time Administration Process, page 371

Loading Time and Labor Data

These processes, run from Payroll for North America, load payable time for payroll processing:

- Time and Labor/Payroll Update COBOL SQL process (PSPLDTL1).
- Pay Calculation process.
- Final check.
- Online check.

If your payroll department prepares paysheets several days before the preliminary pay run, you may want to run the Time and Labor/Payroll Update process directly 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.

The load processing performs several steps:

- Selects payable time entries in Time and Labor.
- Passes payable time entries to payroll.
- Consolidates payable time entries.
- Updates paysheets or creates new paysheets if none exist.

Time and Labor selects the payable time; Payroll for North America does the rest.

Selecting Payable Time

Time and Labor retrieves payable time that meets the criteria defined by the pay run ID, pay calendars, and other selection criteria specified in the Time and Labor/Payroll Update process run control parameters in Payroll for North America. For each calendar, Time and Labor selects all payable time that meets the selection criteria, excluding record-only adjustments, up to the pay end date for all time reporters associated with the calendar.

A payroll user initiates the Time and Labor/Payroll Update process from the Load Time and Labor component (PY_LDTL_RC), specifying the pay run ID, additional filtering criteria, and identifying which data should be loaded to separate checks. Based on the options selected in this component, the process selects appropriate payable time from Time and Labor records.

For Time and Labor to load payable time into 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)

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- *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. 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.

- *RV* (Reversed)

  The Reversed payable time status exists to handle check reversals in Payroll for North America. The Payroll for North America Reversal process generates payable time rows with this status. Time and Labor generates the reversed payable time row and any new payable time to be loaded in a subsequent Load process. This process occurs after Payroll for North America has successfully completed the Confirm Pay process.

  The process of generating an additional row to be loaded in a subsequent Load process depends on the option selected in the Reversal process from Payroll for North America.

  See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Confirming Pay," Correcting Unconfirmed Time and Labor Payable Time Generated by a Check Reversal.

Note. 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 Time and Labor matches the currency defined for the pay group in Payroll for North America when the reported quantity is an amount.

How Payroll for North America Updates Selected Payable Time Records

Payroll for North America updates each payable time entry for the selected time reporters.

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.

- Sets the TL Pay System indicator to *NA Payroll for North America.*
- Sets the payroll request number to the appropriate payroll request.

  The system-generated request number is important if payroll clerks need to refresh or reload data later.

For payable time entries not accepted by Payroll for North America, 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.

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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 the Time and Labor/Payroll Update process loads payable time entries into Payroll for North America, it summarizes the entries according to the application's consolidation rules. Use the Pay Group Table - Time and Labor page in Payroll for North America to instruct the system to create separate rows on the paysheets for payable time entries that have the same combo code, business unit, department, job code, locality, position number, pc (Project Costing) business unit, project ID, activity ID, or state.

Note. If Time and Labor passes an override rate to Payroll for North America, and a rate already exists on the earnings code definition, the rate on the earnings code definition 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.

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 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 sets the Frozen Date field to the pay period end date of the associated pay calendar.

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

Chapter 14, "Understanding Payable Time," page 387

Chapter 18, "Integrating with Payroll Applications," Configuring Time and Labor for Use with Payroll for North America, page 507

Chapter 18, "Integrating with Payroll Applications," Refreshing Data, page 514

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Setting Up Pay Groups"

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Integrating with PeopleSoft Enterprise Time and Labor"

Running the Payroll Process

After creating paysheets, a payroll user runs the Pay Calculation and the Pay Confirmation processes as usual.

Depending on the options selected on the Installation Table - Product Specific page, 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.

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Unsheeting a Pay Run

When a pay run is unsheeted, Payroll for North America changes the payable status of Time and Labor entries from *Taken – Used by Payroll (TP)* to *Rejected by Payroll (RP)* with the reason code *Cancelled,* and resets the payroll request number to *0.* Entries with a payable status of *Distributed (PD)* or *Diluted (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.)

Reversing or Adjusting a Paycheck

Payroll for North America check reversals enable you to track reversed time in Payable Time, or repay time in a new check. Check reversals can be done in the same pay cycle or different pay cycle and can be done before or after the Extract Cost process.

The way in which Time and Labor and Payroll for North America handle paycheck reversals and adjustments depends on the selections you make on the Paycheck Reversal/Adjustment page in Payroll for North America. This page contains two options in the Process Request Parameter(s) group box. These options are available on the page if payable time exists in the paycheck with any of these statuses: Taken – Used by Payroll (TP), Distributed (PD), Diluted (D), and Closed (CL). The options are:

- Reversal – generates a new row in Payable Time with the status of Check Reversal (RV).
- Reversal/Adjustment – generates a new row in Payable Time with the payable status of Check Reversal (RV) and an additional row to be loaded for future payment. The payable status of the additional row is Estimated – Ready for Payroll (ES).

Note. Payable Time with the Check Reversal status is not displayed on the Adjust Paid Time page in Time and Labor.

The process that creates the offset and new rows in Payable Time is triggered after the Pay Confirmation process completes successfully. This ensures that check reversal is confirmed and not unsheeted. If an Unconfirm occurs in Payroll for North America, followed by deletion of a check reversal, Time and Labor removes the reversed and new rows in Payable Time.

The rows with a payable status of Check Reversal (RV) that are created in Payable Time are published to Project Costing to keep track of reversed time. This occurs when the Extract Costs process is run, or when the Time and Labor Pay Reversal process is triggered after the Pay Confirm process.

See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Confirming Pay," Correcting Unconfirmed Time and Labor Payable Time Generated by a Check Reversal

Extracting Costs After a Pay Run

After loading payable time into Payroll for North America and running and confirming the payroll calculation process, Payroll for North America initiates the Extract Time and Labor Costs Application Engine process (PY_PULL_COST) to extract cost data that was generated through:

- On-cycle and off-cycle pay runs.
- Final check.
- Online check.

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What the Extract Process Does

The Extract process updates the payable time entries in Time and Labor as follows:

- If the payable time is distributed, but not diluted, the Extract process changes the payable status to *Distributed (PD)*.
- If the payable time is distributed and diluted, the Extract process changes the status to *Diluted (DL)*.

Note. For time that is not being distributed , the Load Time and Labor process sets the payable time status to *Closed (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 Time and Labor, if applicable.
- Sets the publish date and publish switch.

Note. If Payable Time is pulled into paysheets, and Ok to Pay is cleared for those related earnings, these rows of payable time are not paid.

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 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 Project Costing is installed, actual payable time entries that are closed, diluted, or distributed are published automatically to Project Costing after running the extract job.

Labor Distribution with Paycheck Reversals

For a discussion of labor distribution and paycheck reversals:

Adjusting Payable Time

This section discusses the adjustment of payable time.

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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 Payroll for North America, run the Time Administration process again so that the changes are sent to Payroll for North America 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 Payroll for North America when you next load payable time.

Record-Only Adjustments

Record-only adjustments entered on the Record Only Adjustment page are not sent to Payroll for North America; however, they can affect the results of the Labor Distribution process and the costs that are published to Project Costing.

- 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 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 Project Costing.

- 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 Project Costing as the actual diluted labor distribution amount when the payable status changes to *CL.*

See Also

Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," page 585

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," page 527

Refreshing Data

A Refresh Request option in 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

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Integrating with PeopleSoft HRMS and Enterprise Expenses"

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Correcting Errors Generated During the Load and Extract Processes

This section discusses the correction of errors generated during the Load and Extract processes. The Review Time and Labor Load component enables you to identify and view load messages by employee.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Integrating with PeopleSoft Enterprise Time and Labor," Reviewing Results and Correcting Errors.

Load Process Errors

Payroll personnel are advised to review the paysheets and check for error messages created during processing. During the Load Time and Labor process, payable time can trigger the processing errors listed in the following table. In all cases, the payroll system 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 Load Time and Labor 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. 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 pay groups in the pay period that is being processed.
- The TRC in payable time is mapped to an earnings code in 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 table options selected, payroll users may be able to modify paysheet data that originated in 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 Time and Labor or change the currency for the entry in Payroll for North America.

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See Also

PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook, "Integrating with PeopleSoft Enterprise Time and Labor," Reviewing Results and Correcting Errors

Integrating Time and Labor with Global Payroll

The Global Payroll core application handles both payroll and absence processing.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Understanding Global Payroll," Global Payroll Features.

This section provides an overview of integrating Time and Labor and Global Payroll and discusses how to:

- Configure Time and Labor for Integration with Global Payroll.
- Load Time and Labor data.
- Correct errors generated by Payable Time.
- Update Payable Time after a pay run.
- Share work schedules with Global Payroll.
- Integrate absence event data.

Processing Overview

The steps involved in preparing for and running a payroll when Time and Labor is integrated with Global Payroll are listed as follows.

To prepare for and run the payroll:

1. Prepare the time and labor data by running the Time Administration process for the time reporters to be paid.

   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.

2. Run the payroll process.

   This automatically loads payable time from Time and Labor. Global Payroll retrieves the appropriate set of payable time from 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.

3. Finalize the pay run.

4. 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 if these features are enabled based on the settings on Time and Labor's Pay System page.

Perform step 1 in Time and Labor. All other interactions are initiated through Global Payroll.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Integrating with PeopleSoft Enterprise Time and Labor," Running a Payroll with Time and Labor Data.

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Planning Considerations

While Global Payroll and 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 *pay* in Global Payroll.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook, "Integrating with PeopleSoft Enterprise Time and Labor," Planning Considerations

Configuring Time and Labor for Integration with Global Payroll

This section discusses how to:

- Configure Time and Labor.
- Configure Human Resources.

Configuring Time and Labor

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 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.

To set up Time and Labor:

1. For each type of payable time to send to 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 Global Payroll on the Pay System page.

   By default, Labor Distribution is selected and Labor Dilution is not. The Labor Distribution option enables Global Payroll to send costs generated by a pay run back to 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.

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Configuring Human Resources

To set up PeopleSoft Human Resources:

1. For each time reporter, verify that the Payroll System field on the Payroll page is set to *Global Payroll.*
2. Repeat step 1 for non-employees if you want to send their payable time to the payroll system.

See Also

Chapter 6, "Establishing Time Reporting Codes," page 101

Chapter 4, "Setting Up Basic Tables," Payroll System Options, page 42

Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," page 527

Loading Time and Labor Data

Payroll personnel use the Payroll/Absence Run Control page to initiate loading payable time into 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 Global Payroll Selects Payable Time and Updates Payable Status

Global Payroll pulls only the subset of payable time that falls within the time period specified by the calendar. It does not include record-only adjustments. The following criteria must also be met:

- For the current period, the payable status of the payable time entry can be:
  - *ES* – Estimated
  - *AP* – Approved
  - *SP* – Sent to Payroll
  - *RP* – Rejected by Payroll
- For retro periods entries, any payable status *except*:
  - *NA* – Needs Approval
  - *CL* – Closed, when the Pay System field is 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.)

Global Payroll also updates each payable time entry as follows:

- For payable time entries loaded into payroll:
  - Sets the payable status to *SP*, unless it already reads *PD* or *DL.*
  - Sets the Time and Labor Pay System flag to *Global Payroll.*
- For payable time entries not accepted by payroll:

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- Sets the payable status to Rejected by Payroll *(RP) or Ignore (IG)*.

  Note. A time manager can close payable time that has a status of Rejected by Payroll (RP) on the Adjust Paid Time page. This sets the payroll request number to 1 and prevents the system from loading this time to payroll. Global Payroll never pulls any payable time rows which have a payroll request number equal to 1. The payable time status, however, remains Rejected by Payroll (RP).

  See Chapter 17, "Managing Time," Adjusting Time, page 487.

  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 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 frozen flag for a selected time reporter's payable time entries.

See Chapter 14, "Understanding Payable Time," Payable Time Attributes, page 387.

Bundling Payable Time

Global Payroll bundles similar instances of payable time for efficient processing. It keeps track of how it bundles payable time and sends to 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, 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, Global Payroll deletes the payable data loaded from 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 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.

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Correcting Errors Generated by Payable Time

After a preliminary pay run is complete, review the Payable Status Report for payable time entries that 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.

See Chapter 14, "Understanding Payable Time," Generating a Payable Status Report, page 403.

Currency Differences

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 Global Payroll processing 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 Global Payroll, a Global Payroll user initiates a batch process, GPTLCOST, that updates the payable time entries in 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, Global Payroll does the following:

- Changes the payable status to *CL* for each entry coded *SP* that was successfully processed and the pay system in not configured for the Time and Labor distribution process.
- 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.

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Global Payroll also sends the cost data associated with payable time entries to Time and Labor. It also returns the original Time and Labor sequence number for each payable time entry 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

Chapter 4, "Setting Up Basic Tables," page 15

Sharing Work Schedules with Global Payroll

Time and Labor and 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.

See Also

Chapter 22, "Using Manager Self-Service for Scheduling Components," Assigning Schedules, page 630

Chapter 8, "Defining Work Schedules," Creating Work Schedules and Schedule Definitions, page 164

Integrating Absence Event Data

This section provides an overview of integrating absence event data with Time and Labor and the payroll system, and discusses how to:

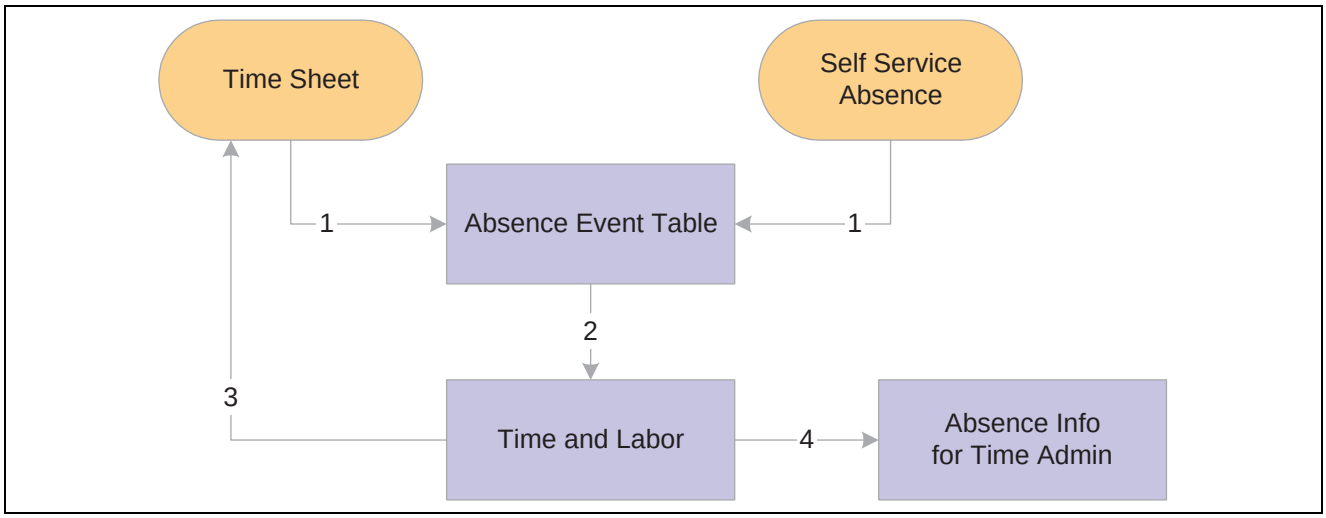
- Integrate Absence Management, Time and Labor, and Payroll for North America.
- Integrate the absence functionality of Global Payroll with Time and Labor.

Understanding Absence Event Integration with Time and Labor

Absence Management integration involves absence event data that is entered in Absence Management or Time and Labor, and is either integrated with either Payroll for North America or Global Payroll.

This diagram shows that absence events can be entered through either Absence Management or on the Timesheet page in Time and Labor:

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Absence Event Points of Entry

The Timesheet component in Time and Labor provides a link that enables you to enter absence event information. You can add, delete, cancel, and edit absence events for the current period of interest. Employees must be enrolled in Time and Labor to use the absence grid on the Timesheet page.

See Chapter 17, "Managing Time," Working with Timesheets, page 464.

The Allow entry in Timesheets check box must be selected on the Country-Take setup page in Absence Management to make the absence Take eligible for use on the Absence Event grid on the Timesheet page. Absence event data that is entered in Absence Management using an ineligible Take code (for Time and Labor) may appear on the Absence Event grid in Time and Labor, but cannot be modified.

Note. During implementation of the integration of Absence Management and Time and Labor, you must complete an analysis of your current absence Take codes that are linked to TRCs. Enable those Take codes that you want to make available for absence event entries on the Timesheet page using the Country-Take setup page in Global Payroll and Absence Management.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, "Setting Up Self-Service Absence Transactions".

Security Considerations

During implementation, align the setup of security for absence requests (in Absence Management) with absences entered on the Timesheet page (Time and Labor) so that the same manager is responsible for viewing or approving absences regardless of where the absence event entry is made. Setup the system so that absences that require multiple levels of approval cannot be entered using the Timesheet page.

Integrating Absence Management, Time and Labor, and Payroll for North America

This section discusses:

- Absence event processing.
- Levels of Absence Management and Time and Labor integration.

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Absence Event Processing

When Payroll for North America, Absence Management, and Time and Labor are integrated, you run the Absence Conversion process after the Absence Entitlement process is completed to send absence event data directly from Absence Management to Payable Time in Time and Labor.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Integrating Absence Management and the Payroll System," Running the Absence Conversion Process to Payroll for North America.

Note. This process is to generate payable time rows for absence for North American Payroll only.

All absence rows for employees that are enrolled in Time and Labor are sent, regardless of whether the Take codes are mapped to TRCs. Time and Labor processes the rows that are mapped to TRC and deletes these rows. For the rows where the Take code is not mapped to a TRC the process ends and a message log is generated to display all those Take codes. You need to map the remaining rows to a TRC. After you map the rows, restart the process using the Process Monitor. When the process restarts, it determines if unprocessed rows exist and it processes the mapped rows first. If other rows are still not mapped, the process stops, a message log is created, and you need to repeat the procedure to map the Take codes to a TRC. The process terminates when there are no more unprocessed rows.

Note. If data is intentionally not mapped, and you do not want these rows to be sent to Time and Labor, the Process Instance can be cancelled or deleted by selecting one of those options in the Update Process group box on the Process Monitor page.

At this stage, no cost is associated with the time. When all the payroll processes are completed, the associated costs and details are sent to Time and Labor. Payable Time rows will get updated with distributed and diluted costs, if needed.

Levels of Absence Management and Time and Labor Integration

The levels of integration between Absence Management, Time and Labor, and Payroll for North America include:

- *Mapping*. Absence pay groups must be set up and configured, time reporting codes in Time and Labor for Payroll North America and Absence Management must be set up, and Absence Management Earnings to Payroll for North America Earnings must be set up.
- *Job Level*. Assign the Job record to Payroll for North America and Absence Management (PNA/AM mapped pay groups) and enroll the time reporter in Time and Labor.
- *Absence Management Process*. Run the Absence Management conversion (AE program) that invokes a Time and Labor process to update Payable Time. After the process is completed, Payable Time in Time and Labor will include absence positive input, if available.
- *Time and Labor and Payroll for North America Process* . Run the Time Administration process in Time and Labor to generate payable time. Run the Load Time and Labor to Paysheets process from Payroll for North America and then the Paysheets process.

See Also

PeopleSoft Enterprise Absence Management 9.0 PeopleBook, "Integrating Absence Management and the Payroll System"

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Integrating the Absence Functionality of Global Payroll with Time and Labor

Prerequisites for enabling absence event data on Timesheets are listed in the Managing Time chapter in this PeopleBook:

See Chapter 17, "Managing Time," Prerequisites for Enabling Absences on Timesheets, page 460.

Displaying Absence Event Data from Global Payroll on Timesheets

In 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 Time and Labor with Global Payroll absence event data, map TRCs to 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, the absence may be recorded through an Absence Entry page in Global Payroll. Time and Labor extracts and resolves absence events whenever you access the time reporting pages. First, Global Payroll checks to see if the employee is enrolled in Time and Labor, then it sends the absence event details, Take configuration, the employee's holiday schedule for the period of interest, a list of holidays, and the employee's schedule to Time and Labor. Time and Labor then generates the rows of data and displays the information on the Absence Event grid on the Timesheet page.

The setup of Time and Labor on the TL Installation page and the setup of the workgroup with which a time reporter is associated determine the way that absence information is displayed in Time and Labor.

Note. If you use the validation set delivered with 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.

Note. Absence event data from Global Payroll is not stored in Reported Time in Time and Labor.

Example: Absence Data from Global Payroll

For each absence, Absence Management 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 Absence Management.

Assume a time reporter is scheduled to work 8 hours a day, Monday through Friday. An absence event is entered on Global Payroll absence pages 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

Absence Management 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 he was absent 8 hours on Tuesday, Wednesday, and Thursday.

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Note. Although Time and Labor can use absences reported in Global Payroll as criteria for rules, it never alters the reported absence data in Global Payroll.

See *PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, “Integrating with PeopleSoft Enterprise Time and Labor”.

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CHAPTER 19

Integrating with PeopleSoft Financials and Enterprise Performance Management

This chapter provides an overview of integrating Time and Labor with PeopleSoft Enterprise Financials and EPM applications and discusses how to:

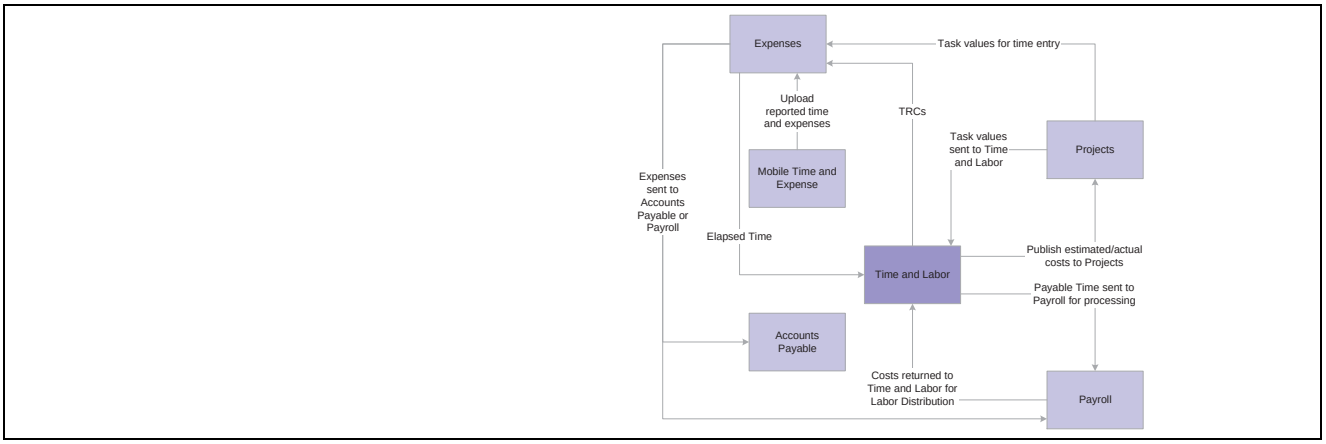
- Integrate with PeopleSoft Project Costing.
- Publish Estimated and Actual Cost Data to PeopleSoft Project Costing.
- Use Time and Labor with Commitment Accounting.
- Integrate with PeopleSoft Expenses and Mobile Time and Expense.
- Integrate with PeopleSoft Enterprise Performance Management.

See Also

Chapter 7, "Defining Task Reporting Requirements," page 123

Understanding Integration

The following illustration shows how you might integrate Time and Labor with other PeopleSoft applications to provide an enterprise-wide solution for time collection, project costing, and compensation.



Integrating Time and Labor with PeopleSoft Financials applications

Understanding Integration Points

Integration between Time and Labor and PeopleSoft Financials and Performance Management (EPM) is accomplished through PeopleSoft Integration Broker.

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The follow tables list the integration points used to integrate with PeopleSoft Financials applications.

Note. To research the technical details of any integration point used by PeopleSoft applications, refer to the Interactive Services Repository found on Customer Connection.

Integration Points Used in Project Costing Integration

This table lists the integration point data for integrating Time and Labor with Project Costing:

Service Operation	Integration Point Name	Queue	Publisher
BUS_UNIT_PC_SYNC BUS_UNIT_PC_FULLSYNC	BUSINESS UNIT TABLE PC	PROJECTS_SETUP	Project Costing
PROJECT_SYNC PROJECT_FULLSYNC	PROJECT TABLE	PROJECTS_SETUP	Project Costing
PROJECT_ACTIVITY_SYNC PROJECT_ACTIVITY_FULLSYNC	PROJECT ACTIVITIES	PROJECTS_SETUP	Project Costing
PROJ_ACTIVITY_STATUS_SYNC PROJ_ACTIVITY_STATUS_ FULLSYNC	PROJECT ACTIVITY STATUS	PROJECTS_SETUP	Project Costing
RESOURCE_TYPE_SYNC RESOURCE_TYPE_FULLSYNC	PROJECT RESOURCE TYPE	PROJECTS_SETUP	Project Costing
RES_TYPE_CAT_LINK_SYNC RES_TYPE_CAT_LINK_ FULLSYNC	PROJECT TYPE-TO-CATEGORY LINK	PROJECTS_SETUP	Project Costing
RES_CAT_SUB_CAT_LINK_SYNC RES_CAT_SUB_CAT_LINK_ FULLSYNC	PROJECT CATEGORY-TO-SUBCATEGORY LINK	PROJECTS_SETUP	Project Costing
RESOURCE_CAT_SYNC RESOURCE_CAT_FULLSYNC	PROJECT RESOURCE CATEGORY	PROJECTS_SETUP	Project Costing
RESOURCE_SUB_CAT_SYNC RESOURCE_SUB_CAT_ FULLSYNC	PROJECT RESOURCE SUBCATEGORY	PROJECTS_SETUP	Project Costing

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Service Operation	Integration Point Name	Queue	Publisher
PROJECT_TEAM_SYNC PROJECT_TEAM_FULLSYNC	PROJECT TEAM	PROJECTS_SETUP	Project Costing
PROJECT_STATUS_DEFN_SYNC PROJECT_STATUS_DEFN_ FULLSYNC	PROJECT STATUS DEFINITION	PROJECTS_SETUP	Project Costing
PROJECT_STATUS_SYNC PROJECT_STATUS_FULLSYNC	PROJECT STATUS	PROJECTS_SETUP	Project Costing
UOM_SYNC UOM_FULLSYNC	UNIT OF MEASURE	ENTERPRISE_SETUP	Financials to HCM
BUS_UNIT_FS_SYNC BUS_UNIT_FS_FULLSYNC	BUSINESS UNIT TABLE FS	ENTERPRISE_SETUP	Financials to HCM
TIME_REPORTING_CODE_SYNC TIME_REPORTING_CODE_ FULLSYNC	TIME REPORTING CODES	TIME_AND_LABOR_ SETUP	T&L
ACTUAL_TIME_ADD ACTUAL_TIME_BATCH_ADD	T&L ACTUAL TIME	ACTUAL_TIME	T&L
ESTIMATED_TIME_BATCH_ADD	T&L ESTIMATED TIME	ESTIMATED_TIME	T&L
TBLSET_CONTROL_INITIALIZE SETID_INITIALIZE	TABLE SET CONTROL	TBLSET_CONTROL	Financials to HCM
ESTIMATE_FORECAST_TIME_ REQUEST Publish Batch Program: PC_TL_TO_PC Subscribe Batch Program: TL_PUB_TM_AE	ESTIMATE & FORECAST TIME REQUEST	ESTIMATED_TIME	Project Costing

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Note. For the ESTIMATED_TIME_BATCH_ADD, ACTUAL_TIME_ADD and ACTUAL_TIME_BATCH_ADD messages, the value that is published as the Department value will vary depending on the data existing in the payable time table. If values exist in the payable time table for DeptID and DeptID_CF, then the value associated with DeptID_CF will be published as the Department to Project Costing. If DeptID_CF does not have a value, then the DeptID value will be published to Project Costing.

Integration Points Used in PeopleSoft Expenses Integration

This table lists the integration point data for integrating Time and Labor with PeopleSoft Expenses and Mobile Time and Expense:

Service Operation	Integration Point Name	Queue	Publisher
ELAPSED_TIME_ADD	T&L LABOR TIME REP ELPSED TIME	ELAPSED_TIME	Expenses
TIME_REPORTING_CODE_FULLSYNC TIME_REPORTING_CODE_SYNC	T&L TRC INFORMATION	TIME_AND_LABOR_SETUP	Time and Labor

Integration Points Used in PeopleSoft EPM Integration

This table lists the integration point data for integrating Time and Labor with PeopleSoft EPM applications:

Service Operation	Integration Point Name	Queue	Publisher
BUS_UNIT_PF_SYNC BUS_UNIT_PF_FULLSYNC	BUSINESS UNIT EPM	PERF_MEASUREMENT_SETUP	Activity Based Management
FINANCIAL_ACTIVITY_SYNC FINANCIAL_ACTIVITY_FULLSYNC	ACTIVITY TABLE	PERF_MEASUREMENT_SETUP	EPM
TBLSET_CONTROL_INITIALIZE SETID_INITIALIZE	TABLE SET CONTROL	TBLSET_CONTROL	GL to HR

See Also

Chapter 16, "Using Time Collection Devices," page 425

PeopleSoft Project Costing PeopleBook

PeopleSoft Expenses PeopleBook

Enterprise PeopleTools PeopleBook: Integration Broker

Integrating with Project Costing

This section provides an overview of Project Costing integration and discusses how to set up Time and Labor with Project Costing.

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Understanding Project Costing Integration

Project Costing 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 Time and Labor task reporting functionality and integrate Time and Labor with Project Costing, you can:

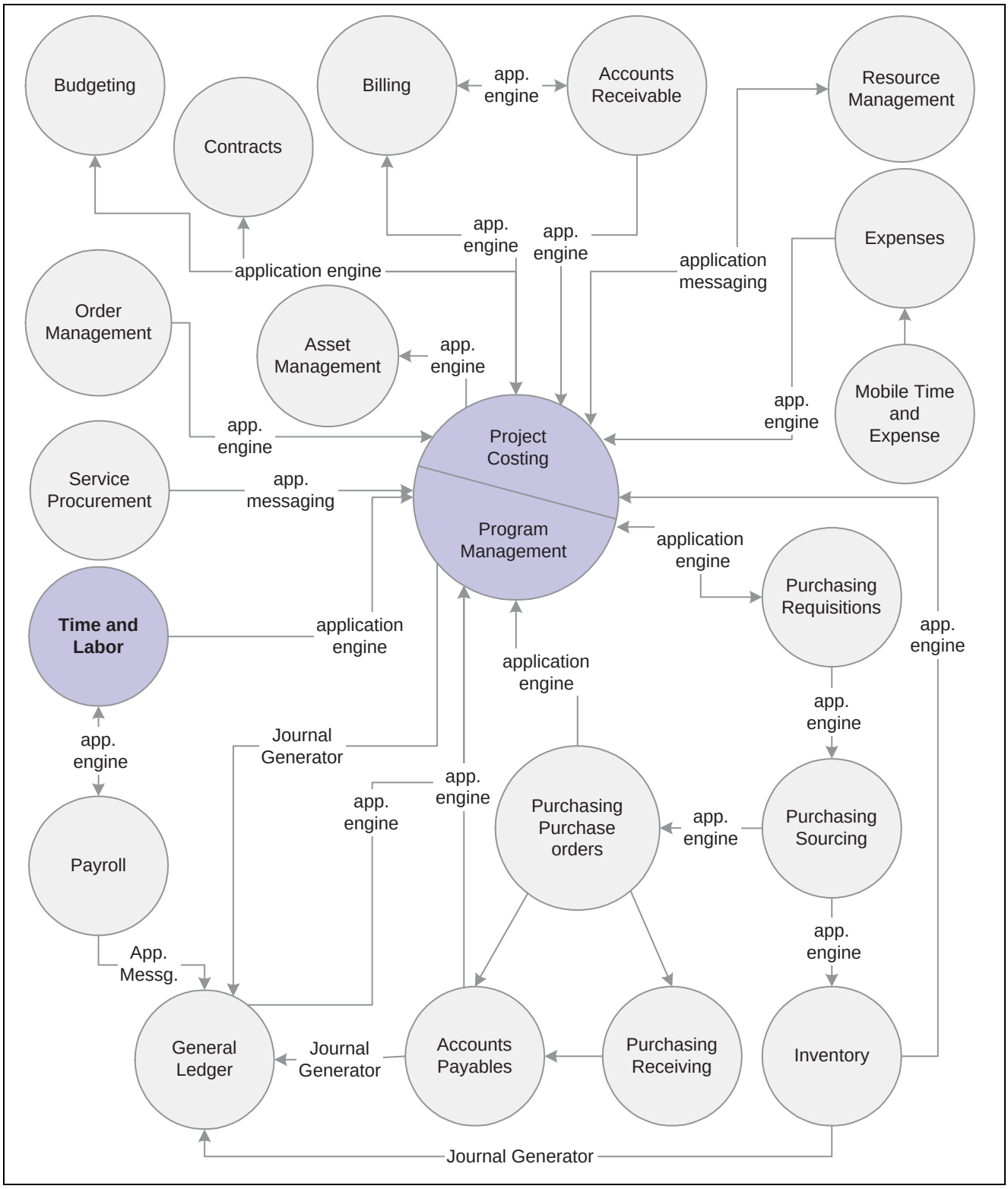
- Track time for the projects, activities, business units, resource types, resource categories, and resource subcategories defined in Project Costing. You accomplish this by including project-related task entities in your task templates and task profiles.
- Publish, or send, estimated project-related costs to Project Costing. This feature can be helpful when your organization bills projects off-cycle from the payroll process.
- Publish actual project-related costs to Project Costing when a payroll cycle is complete. To use this feature, you must run your payroll through a payroll system that integrates with Time and Labor, such as Payroll for North America or Global Payroll.

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.
- Track time and cost data by ChartField for both accounting and commitment accounting.

The following diagram illustrates the process flow in Project Costing.

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Project Costing / Program Management integration flow with other applications

Data Published to Project Costing

When Time and Labor publishes data to Project Costing, it sends the fields in the payable time record and the following data:

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- All related ChartFields if a combination code 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 job code of the time reporter.

  Project Costing can use the job code 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.
- The Accounting date of the Time and Labor cost transactions that are synchronized with the accounting period in Project Costing, as well as with the accounting period for other costs that are posted in General Ledger.

See Also

PeopleSoft Project Costing PeopleBook

Chapter 19, "Integrating with PeopleSoft Financials and Enterprise Performance Management," Using Time and Labor with Commitment Accounting, page 540

Chapter 14, "Understanding Payable Time," page 387

Setting Up Time and Labor for Integration with Project Costing

To integrate Time and Labor with Project Costing:

- Activate the appropriate service operations used in Project Costing integration.
- Select the appropriate installation options in Time and Labor.
- Retrieve units of measure from Project Costing and configure the TRC to publish to Project Costing.
- Ensure that you have set up as a time reporter in 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 Project Costing.

Instructions for completing each setup step follow. Initiate some of these steps in Project Costing. They require coordination with those who administer your Project Costing application. We recommend that you discuss the setup process with the Project Costing administrators before beginning.

Activating Integration Points Used in Project Costing Integration

The service operations that must be activated are listed earlier in this chapter. Detailed instructions for activating service operations are found in PeopleTools PeopleBooks.

See *Enterprise PeopleTools PeopleBook: Integration Broker*

Selecting Installation Options in Time and Labor

On the Time and Labor Installation page, select the Interface with PS/ Projects option. When you select this option, the system automatically selects the Calculate Estimated Gross option to indicate that the system will calculate the estimated costs associated with payable time when you run the Time Administration process.

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You can select Publish unmapped TRC as No Pay to send information to Project Costing.

You can also select the Chartfields validation option that you require.

Retrieving Units of Measure from Project Costing and Publishing to Project Costing

When you define time reporting codes (TRCs) in Time and Labor, you select the unit of measure appropriate to each TRC. When Time and Labor is integrated with Project Costing, the valid units of measure come directly from Project Costing. 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 Project Costing have been published to Time and Labor. This process is initiated in Project Costing using a full publish.

Subsequent changes made to the units of measure are published to Time and Labor automatically (through an incremental publish) as they occur.

In addition, on the TRC 2 page, select the Publish to Project Costing check box. When you select this check box, the system sends project-related payable time information to Project Costing.

Enrolling Time Reporters in Time and Labor

In Time and Labor, enroll as a time reporter each person who reports time to Project Costing.

Setting Up Task Templates and Task Profiles for Project Tracking

Integration with Project Costing 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 Project Costing:

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 and project ID.
Resource Type, Resource Category, and **Resource Subcategory**	In Project Costing, you can define dependencies between resource types, categories, and subcategories (through the dynamic edit options specified on the Project Costing Definition page in the Project Costing application). These relationships control data entry and help reduce errors. The valid values that time reporters can enter for the resource type, category, and subcategory 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 Project Costing and made available to Time and Labor through PeopleSoft Integration Broker messages. 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 Project Costing.

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In Time and Labor, you can view, but not modify the project-related task values on the following pages: PC Business Unit 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.

Project Costing initiates the transmission of project values to Time and Labor using Integration Broker with XML transmission.

As users add or change project-related data in Project Costing, the PeopleSoft Human Resources Management (HRMS) tables are updated to reflect the changes.

Note. When a "full table" publish is initiated in Project Costing, all task values are deleted from the HRMS tables before the current set of values is loaded. Consult with your Project Costing 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 Project Costing, the Project Status field (PROJECT_STATUS) in the PS_PROJECT_STATUS Table in 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 Project Costing, you can select an Enforce Project Team option for all projects associated with a particular business unit. When this option is activated, Time and Labor only permits time reporters to enter time for projects on which they are team members.

See Also

PeopleSoft Project Costing PeopleBook

Chapter 13, "Understanding the Batch Process in Time Administration," Calculate Estimated Gross, page 360

Chapter 10, "Setting Up Time Reporters," page 203

Chapter 7, "Defining Task Reporting Requirements," Understanding Task Reporting with PeopleSoft Financials, page 135

Chapter 12, "Creating Rules in Time Administration," page 227

Publishing Estimated and Actual Cost Data to Project Costing

This section presents an overview of publishing estimated and actual cost data to Project Costing and discusses how to:

- Publish estimated payable time.
- Publish actual payable time.

Understanding Estimated and Actual Cost Data

You can send both estimated and actual time and cost data to Project Costing.

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- Estimated costs are those calculated by the Time Administration process before payable time is sent to payroll.

  When estimated costs are sent to Project Costing, Project Costing replaces any previously received estimated payable time with the entries received from 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.

  Project Costing considers all payable time it receives to be additions to previously received time. Time and Labor sends offsets in the rare cases when there is updated actual time.

When Estimated Costs are Published to Project Costing

Estimated payable time is published to Project Costing in the following cases:

- When Time and Labor receives a request from Project Costing.

  The request arrives in the form of a message from the PeopleSoft Financials database. In response, Time and Labor automatically publishes estimated time for payable time when the following conditions are met:

  - A record has a value in the Business Unit PC, Project ID and Activity ID fields and that have a payable status of *Estimate, Needs Approval, Approved, Sent, Rejected,* and *Taken*.
  - The related TRC has the Publish to Projects option selected.

  Note. The publish switch field (Publish_Sw) on the Payable Time table is updated with a status of *Ignored* for records that do not have an occurrence of either of the above.

- When you run the Publish Estimated Payable Time process.

  The system handles this in exactly the same manner as Time and Labor receiving a request from Project Costing.

When Actual Costs are Published to Project Costing

Actual payable time is published to Project Costing:

- When you run the Publish Actual Payable Time process.

  In this case, 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 Time to Payroll option is not selected on the Maintain Time Reporter Data 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 page.)
- When you 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.
- When a record has a value of *No Pay* for the payable status field and the following conditions are met:
  - Publish No Pay rows is enabled on the Time and Labor Installation page.

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- Maintain Time Reporter Data - Send Time to Payroll option is selected.
- The TRC is not associated with an earnings code.

Other actions that cause actual payable time to be published vary by payroll system:

Payroll for North America Integration

When Time and Labor is integrated with Payroll for North America, actual time and cost data is published in the following cases:

- When Payroll for North America sets the status of successfully processed payable time entries to *Closed.* This happens because you have elected not to use labor distribution. Publishing occurs at the end of the load process.
- At the completion of the Extract process started in Payroll for North America. Publishing occurs after costs have been labor distributed (and diluted if the labor dilution feature is active).
- 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, Distributed,* or *Diluted.*

Check Reversals (Payroll for North America)

The process to generate reversed rows and additional rows for future payment is an application engine process (TL_PAY_REVRS) and is triggered after the PayConfirm process completes successfully. This process also determines if any original or reversed rows must be sent to Project Costing.

These four scenarios describe how reversed checks are handled and how the associated costs are published to Project Costing:

- Straight Reversal – before the Extract Cost process is completed.

  After the TL Load Data process is run, the payable time status is set to Taken by Payroll. If the check reversal occurs before the Extract Cost process is run, reversed rows with a Reversed status are created, and the original rows still have the status of Taken by Payroll.

  When confirming the check reversal before the Extract Cost process is run, the reversal rows are not sent to Project Costing because the original rows with actual costs have not been sent yet. When running the Extract Cost process after confirming the reversal process, both the original rows with actual costs and reversed rows are published to Project Costing.

  Because of the estimated costs were sent to Project Costing earlier, and these costs may already have been billed, Time and Labor sends both the original row (with actual costs) and the reversed row (offset) for the reconciliation process on the Project Costing side.

- Straight Reversal – after the Extract Cost process is completed.

  When the Extract Cost process is run, the original rows with actual costs are sent to Project Costing. If the check reversal process occurs after the Extract Cost process is completed, the original rows with actual costs have already been sent to Project Costing; consequently, the reversed rows are sent to Project Costing immediately.

- Reversal with future payment – before the Extract Cost process is completed.

  After the TL Load Data process is run, the payable time status is set to Taken by Payroll. If the check reversal occurs before the Extract Cost process is run, the reversed rows with a Reversed status are created, and the original rows with status Taken by Payroll are changed to the Reversed status (see PeopleBook — Time and Labor Integrating with Payroll Applications for why the status changed). These original rows are sent to Project Costing with the reversed rows.

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- Reversal with future payment – after the Extract Cost process is completed.

  When the Extract Cost process is run, the original rows with actual costs are sent to Project Costing. If the check reversal process occurs after the Extract Cost process is completed, and the original rows with actual costs have already been sent to Project Costing, the reversed rows are sent to Project Costing immediately. Additional rows for future payment with the Estimated status are not sent to Project Costing.

See Chapter 18, "Integrating with Payroll Applications," Reversing or Adjusting a Paycheck, page 512.

Unconfirming and Unsheeting a Payrun that Contains a Check Reversal (Payroll for North America)

These two scenarios describe how reversed checks are handled and how the associated costs are published to Project Costing when you unconfirm and unsheet a payrun:

- Straight reversal with no additional row.

  Time and Labor removes all payable time rows with the Reversed status that have an initial sequence number equal to the sequence number of the original check entered by the user. Time and Labor publishes the original row with PUBLISH_SW equal to "Y" to Project Costing. This assumes that the reversal row has already been published to Project Costing and alerts Project Costing that the reversal has been undone.

- Check reversal with an additional row generated.

  Time and Labor removes all payable time rows with statuses *Reversed, Estimated, Needs Approval, Rejected, and Ignored* that have an initial sequence number equal to the sequence number of the original check entered by the user. Time and Labor publishes the original row with PUBLISH_SW equals to "Y" to Project Costing only if the reversal row and/or the new row have already been published.

Global Payroll Integration

When Time and Labor is integrated with Global Payroll, actual time and cost data is published in the following cases:

- When 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 is initiated through the Time and Labor Run Control in Global Payroll.
- At the completion of the Labor Distribution or Labor Dilution process that is 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.*

Note. On the payable time table, the payable status field value of *Ignore* is used by the Global Payroll system. The status of *Ignore* is set by Global Payroll when offset rows are created in Time and Labor.

The publish switch field is set to *Ignore* for rows of payable time that have payable status set to *Ignore* and either the PC Business Unit, Project ID or Activity ID are blank or both the LBR_DIST_AMT and DILUTED_GROSS fields are blank.

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Pages Used to Send Estimated and Actual Costs Data to Project Costing

Page Name	Object Name	Navigation	Usage
Publish Estimated Payable Time	TL_RUN_PUB_TIME	Time and Labor, Process Time, Publish Estimated Payable Time, Publish Estimated Payable Time	Initiate the transmission of estimated costs if the version of Project Costing you are using retrieves data through flat files. Also transmit estimated cost data to other applications. If your version of Project Costing uses XML to transmit data, estimated payable time is published automatically in response to a request message from Project Costing. 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	Time and Labor, Process Time, Publish Actual Payable Time, Publish Actual 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.

Accounting Date The accounting date is assigned to every row of payable time published to Project Costing. It defaults to the current date, but you can change it.

Run Click to run the Publish Payable Time Application Engine process (TL_PUB_TM_AE).

Publishing Actual Payable Time

Access the Publish Actual Payable Time page.

In Payroll for North America, you must confirm the pay run before publishing cost data.

Accounting Date The accounting date is assigned to every row of payable time published to Project Costing. It defaults to the current date, but you can change it.

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Run Click to run the Publish Time that PY Closed Application Engine process (TL_PY_PUB_TM).

See Also

Chapter 13, "Understanding the Batch Process in Time Administration," Calculate Estimated Gross, page 360

PeopleSoft Project Costing PeopleBook

Chapter 18, "Integrating with Payroll Applications," page 501

Using Time and Labor with Commitment Accounting

This section provides an overview of the Commitment Accounting interface and discusses how to:

- Set up Time and Labor for use with commitment accounting.
- Distribute costs after a pay run.

Understanding the Commitment Accounting Interface

This section discusses:

- Commitment accounting.
- The commitment accounting interface.

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.

A combination code (also referred to as a *funding source*) is a key that defines a valid combination of Standard Configuration ChartFields setup in FMS or HCM. 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 value of Department and Project to the Salaries combination code.

If you're using PeopleSoft Financials with 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.

The Commitment Accounting Interface

To use the commitment accounting functionality with 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 is set up for commitment accounting functionality to a taskgroup defined for commitment accounting.

When time reporters enter their time, they must provide a combination code, and any other task elements you selected when defining the task template. Time and Labor uses the combination code to retrieve the appropriate ChartField values for the following fields:

- Account

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- Alt Acct (alternate account)
- Operating Unit
- Fund Code
- GL Department
- Program Code
- Class Field
- Budget Reference
- Product
- Project ID
- Affiliate
- Fund Affiliate
- Operating Unit Affiliate
- ChartField1
- ChartField2
- ChartField3

Note. ChartField values in FMS can be exported into the HCM Database through Integration Broker.

When you run the Time Administration process, 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 Payroll for North America for processing, you can distribute costs associated with combination codes and ChartFields back to Project Costing after a pay run.

See Also

PeopleSoft Human Resources PeopleBook: Manage Commitment Accounting

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Commitment Accounting, "Getting Started with Manage Commitment Accounting"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with ChartFields and ChartField Combinations"

PeopleSoft Project Costing PeopleBook

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Commitment Accounting, "Setting Up Commitment Accounting Processing Control Tables"

PeopleSoft Enterprise PeopleTools PeopleBook: Integration Broker

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Setting Up Time and Labor for Use with Commitment Accounting

To integrate 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 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 Load Combination Code process (BUD003) to load the Combination Code table with ChartField combinations already imported from the PeopleSoft Financials database into the GL_ACCT_CD_TBL using the HR_ACCT_CD_LOAD service operation.

  See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with ChartFields and ChartField Combinations," Entering and Maintaining Valid ChartField Combinations.

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 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 Payroll for North America across combination 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 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 combination code to which time was reported in Time and Labor and distributes the costs in the same ratio that was used for labor distribution.

Note. If any of the company/pay group combinations to be run in the Actuals Distribution process are not correctly set up, you can rerun the process after you have corrected the error.

Use the task reporting pages in 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.

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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

Chapter 1, "Getting Started with Time and Labor," Time and Labor Implementation, page 3

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Maintaining Departments

Chapter 7, "Defining Task Reporting Requirements," page 123

Chapter 10, "Setting Up Time Reporters," Entering and Maintaining Time Reporter Data, page 206

Distributing Costs after a Pay Run

After you confirm a pay run in Payroll for North America, run the Actuals Distribution process with 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 a combination code specified on the employee's job record. If none is found, it uses the combination 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.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Commitment Accounting, "Creating and Posting Actuals Data to PeopleSoft Enterprise Financials"

Integrating with PeopleSoft Expenses and Mobile Time and Expense

This section provides an overview of the integration with Mobile Time and Expense and discusses how to:

- Set up Time and Labor for Use with Mobile Time and Expense.
- Synchronize Data.
- Retrieve time from Mobile Time and Expense.

Understanding Integration with Mobile Time and Expense

This section discusses:

- PeopleSoft Mobile Time and Expense
- Entering and submitting time through PeopleSoft Mobile Time and Expense
- Integration with PeopleSoft Mobile Time and Expense

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PeopleSoft 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 Time and Labor through Integration Broker, where it can be converted to payable time and sent to your payroll application.

Elapsed-time reporters who use PeopleSoft Mobile Time and Expense technology download their time to a server; that time is routed to Time and Labor.

If you've integrated Project Costing 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 Project Costing. (The business unit associated with the time reporter's employee ID and employment record number determines which set of control data is sent to the user.)

Note. Performing the TCD setup procedure is not necessary to use PeopleSoft Mobile Time and Expense as a time collection device. Mobile Time and Expense does not accept setup data from Time and Labor. Mobile Time and Expense sends Integration Broker messages to Time and Labor by time reporter ID containing elapsed time data that Time and Labor sends to a pay system and Project Costing.

Note. Both Time and Labor and PeopleSoft Expenses can send reported time directly to Project Costing. To avoid sending the same data twice, PeopleSoft recommends that you use either Time and Labor or Expenses exclusively to send reported time.

Entering and Submitting 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 realtime 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.

Time and Labor accepts time from the current period and adjustments to prior time periods.

Integration with PeopleSoft Mobile Time and Expense

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 Time and Labor for further processing and the creation of payable time.

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See Also

Chapter 6, "Establishing Time Reporting Codes," page 101

PeopleSoft Mobile Time and Expense PeopleBook

Setting Up Time and Labor for Use with Mobile Time and Expense

To integrate Time and Labor with Mobile Time and Expense, perform the following actions:

- Activate the appropriate application messages used in PeopleSoft Mobile Time and Expense integration.
- Ensure that remote users are set up as time reporters in Time and Labor.
- Publish TRC information to the PeopleSoft Financials database.

Activating Integration Points Used in PeopleSoft Mobile Time and Expense Integration

The necessary application messages that must be activated are listed in the *Understanding Integration Points* section earlier in this chapter.

Detailed instructions for activating application messages are found in the *PeopleSoft Enterprise Integration*PeopleBook.

Enrolling Time Reporters in Time and Labor

Each person who reports time through PeopleSoft Mobile Time and Expense must be a time reporter in 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 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 Error Queue.

Publishing TRCs to Mobile Time and Expense

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 Time and Labor; however, the Expense's administrator can override the descriptions.

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See Also

Chapter 10, “Setting Up Time Reporters,” Entering and Maintaining Time Reporter Data, page 206

Chapter 19, “Integrating with PeopleSoft Financials and Enterprise Performance Management,” Understanding Integration, page 527

PeopleSoft Enterprise Mobile Time and Expense PeopleBook

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 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 Time and Labor.

See Also

PeopleSoft Expenses PeopleBook

Integrating with Performance Management

Performance Management (EPM) enables you to collect and use data generated by other enterprise applications, such as Time and Labor, to analyze your business processes, profitability, and key performance measures.

When you select Interface with PS/EPM on the Time and Labor 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 Performance Management after they reach the frozen state. You can then use the data within your financial analyses.

See Also

Chapter 4, “Setting Up Basic Tables,” Setting Up System Defaults and Loading Dates, page 26

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CHAPTER 20

Using Self-Service Components

This chapter provides an overview of self service components for employees and discusses how to:

- Use Time and Labor Launch Pad pages.
- Set up user preferences.
- Report time.
- View time.
- Requesting overtime.

Understanding Self-Service Components

The self-service components enable employees to review, add, update, and delete (where appropriate) their time and labor information. Self-service components include:

- Time and Labor Launch Pad for employees (TL_LAUNCH_PAD_PNLG).

  Enables employees to view information about reported and scheduled time for a month at a time. It also enables employees to navigate to self-service transaction pages.

- Time Sheet (TL_MSS_EE_SRCH_PRD).

  Enables employees to view and report time and task details for a day, week, or time period for punch and elapsed time.

- Mass Time for employees (TL_MASS_TIME_ESS).

  Enables employees to report time in several ways. They can report time according to their schedule for a specified date or date range. They can also specify a lump sum amount to be distributed according to their schedule, or specify multiple time transactions to be applied to each day in the time period.

- Overtime Requests (TL_OT_HISTORY_LIST).

  Enables employees to view recent overtime requests or submit a new overtime request.

- Web Clock (TL_WEBCLK_ESS).

  Enables employees to enter a single punch and provide time and task details.

- Monthly Schedule (SCH_EE_SCHEDULE).

  Enables employees to display monthly schedules.

- Compensatory Time (TL_COMPTIME_PNL).

  Enables employees to view compensatory time balance and compensatory time expiration information.

- Exceptions (TL_MNG_EX_PNL_GRP3).

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Enables employees to display exceptions associated with reported time.

- Payable Time Summary (TL_TM_MPAY_SUMM_PG).

  Enables employees to view payable time that the system calculated from a schedule or reported time.

- Payable Time Detail (TL_MNG_PAY_VIEW_DT).

  Enables employees to view details about their payable time.

- Forecasted Time Summary (TL_TM_SPAY_SUMM_PG).

  Enables employees 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 (TL_MNG_SPAY_VIEW_D).

  Enables employees to view details about forecasted payable time.

- User Preferences (TL_USER_PREF).

  Enables employees to view or update their time reporting and scheduling preferences.

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 in the organization. This can include regular employees as well as contractors and other temporary workers.

Navigating in Time and Labor Home Pages

There are several ways to access self-service transactions:

- The Self Service page.
- The Time Reporting page.
- Standard menu path navigation.

Self Service Page

The Self Service page present a simple user interface design and directs navigation for the end user.

The links that appear on the page depend on which collaborative applications were purchased and whether the products are selected in the Installation Table.

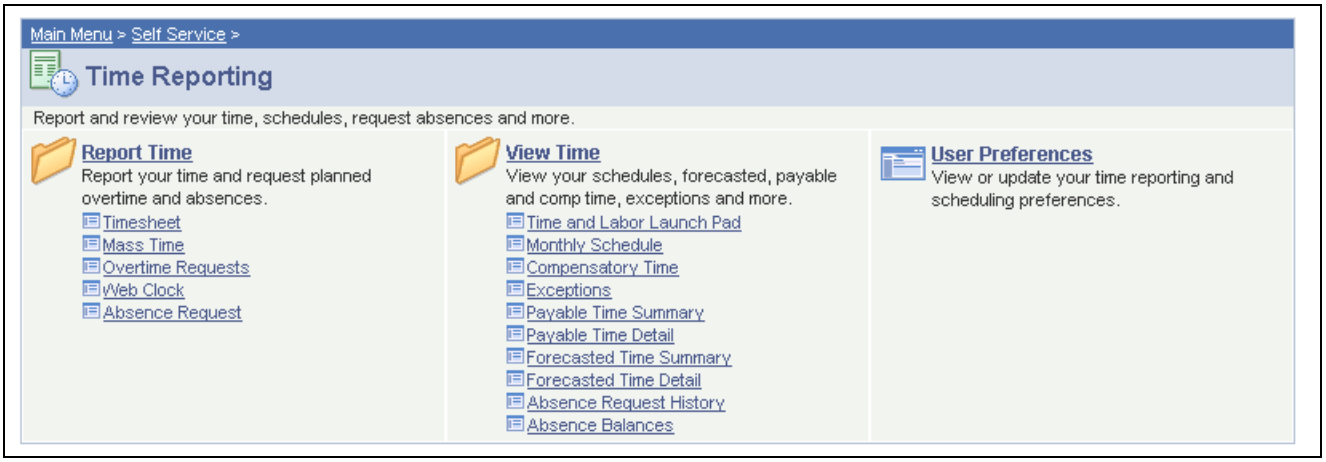
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Self Service page

Time Reporting Page

This page includes links to all Time and Labor self-service transactions that pertain to the user. The user can also click a link to return to the Self Service page.

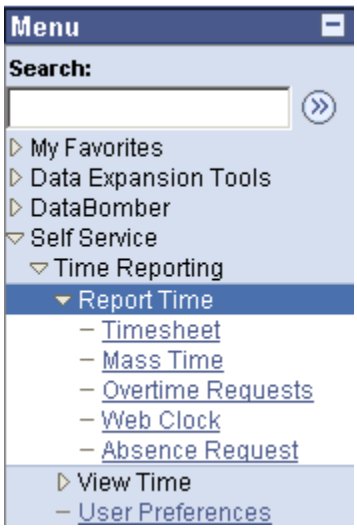


Time Reporting page

Standard Menu Navigation

The standard menu-driven navigation is the traditional PeopleSoft access method.

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Standard self service navigation path

Using Time and Labor Launch Pad Pages for Employees

This section discusses how to:

- Use Time and Labor Launch pages to view employee hours.
- Use Time and Labor Launch pages to view detailed calendar information for employees.

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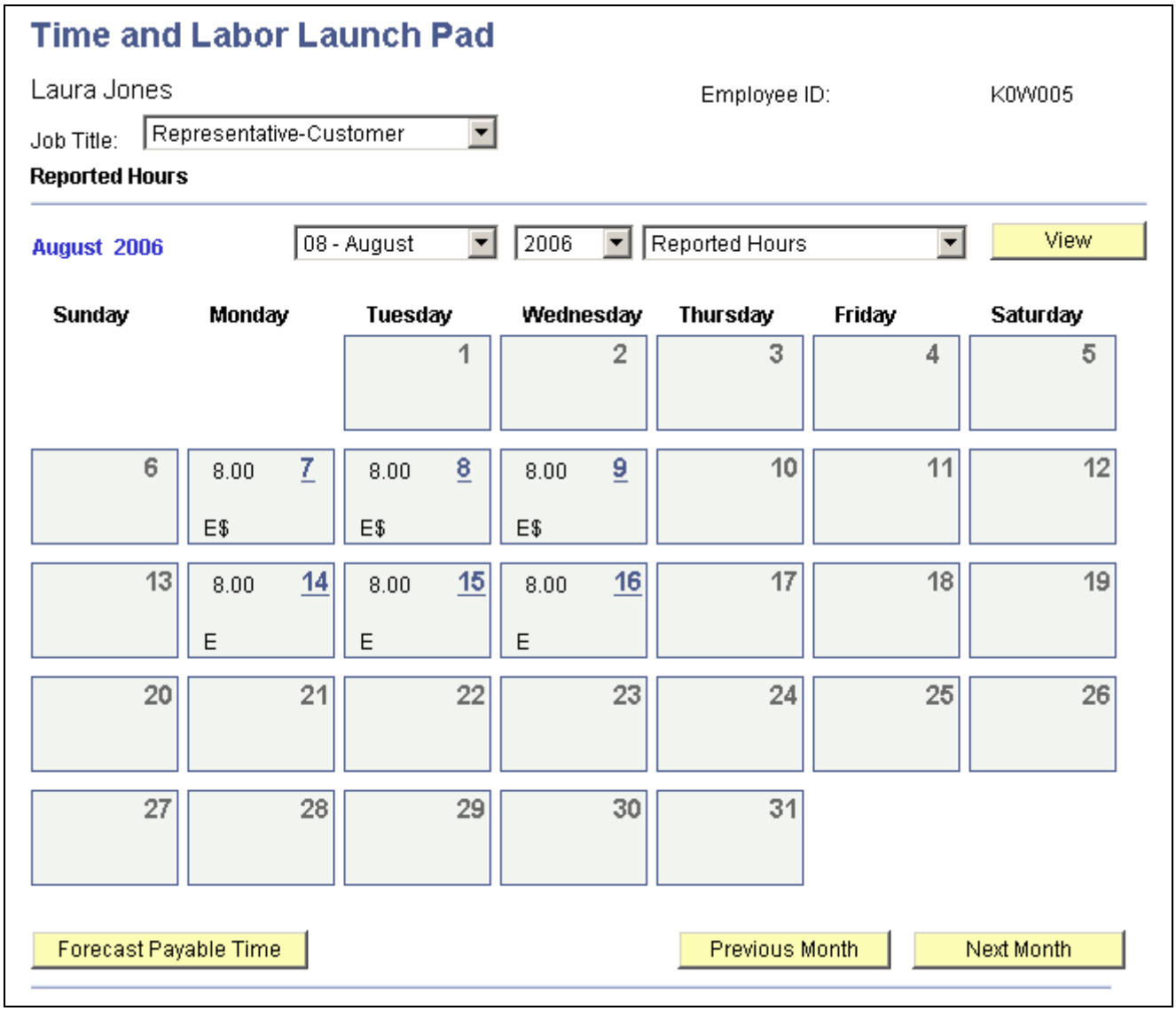
Pages Used to Specify Time and Labor Launch Pad Information for Employees

Page Name	Object Name	Navigation	Usage
Time and Labor Launch Pad	TL_LAUNCH_PAD	Self Service, Time Reporting, View Time, Time and Labor Launch Pad, 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 time sheet information, forecasted payable time, the actual number of payable hours (detail and summary), or scheduled hours that were reported for each day. Use the Time and Labor Launch pages to navigate to other Time and Labor pages enabling the user to manage all aspects of their time.
Details	TL_LAUNCH_PAD_DLY	Click the Date link on the Time and Labor Launch Pad page to access the Details page. The Details page provides more information on the Reported Elapsed or Punch time, Exceptions, and Payable or Forecasted Payable time that exist for that day.	View detailed calendar information for each day.
Monthly Schedule	SCH_EE_MONTHLY	Self Service, Time Reporting, View Time, Monthly Schedule, Monthly Schedule	View the monthly schedule for each job, if an employee has multiple jobs. Navigate to any month, or year and navigate to a prior or future month.
Monthly Schedule - Daily Detail	SCH_EE_DAILY	Click a Date link on the Monthly Schedule page.	View schedule details for a day.

Viewing Employee Hours

Access the Time and Labor Launch Pad page.

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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 Click this button after you enter the month, year, and the type of hours to display on the calendar. Options for the type of hours are *Forecasted Payable Hours*, *Exceptions*, *Payable Hours*, *Reported Hours*, or *Scheduled Hours*.

For example, if you select *Scheduled Hours* and *8.00* is displayed in the days on the calendar, then you are scheduled to work eight hours on those days.

Previous Month and **Next Month** Use these buttons to display the preceding or next month.

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At any given time, any day in the calendar may display the following valid values: *X, P, E, $, F,* or *R*. These values indicate that there is information about reported time for that day. For example, suppose *E* appears for one day on the calendar. This means that the employee has elapsed time reported for that day. If *$* 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 the day to view the time reporting details that exist for that day.

Forecast Payable Time Click this button to start the Forecasted Payable Time process, which calculates forecasted payable time for the employee.

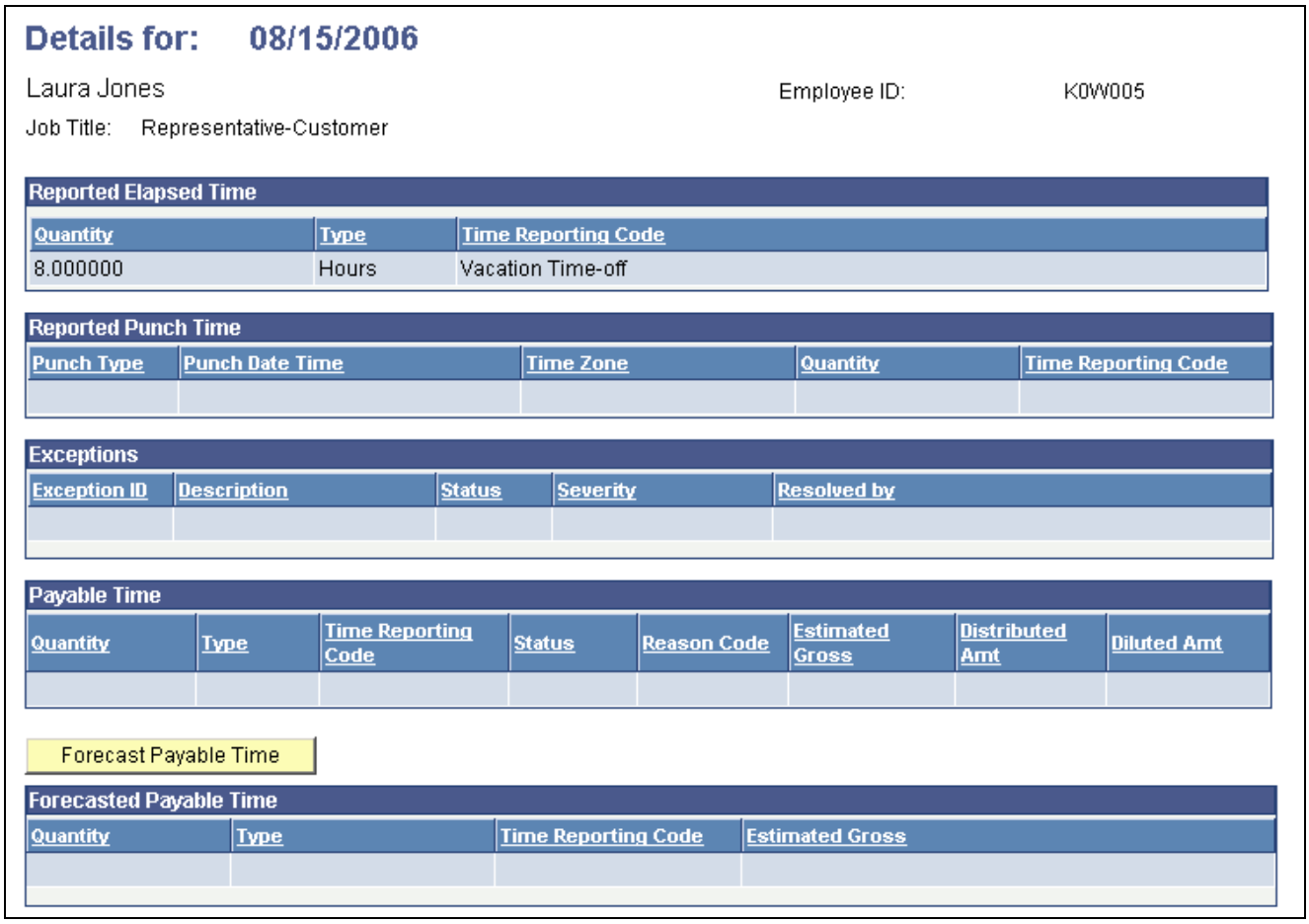
The system looks at the employee's schedule and any time they have reported for this month. It then indicates which days have payable time forecasted for them by displaying an *F* on the day. To view the number of forecasted hours for that day, change the view at the top of the page to *Forecasted Payable Hours* and click the View button. To view the details of the forecasted time, click 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 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. These can include Monthly Schedule, Timesheet, View Forecasted Payable Time, View Payable Time (Detail) and View Payable Time (Summary).

Viewing Detailed Calendar Information

Access the Details page.

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Details page

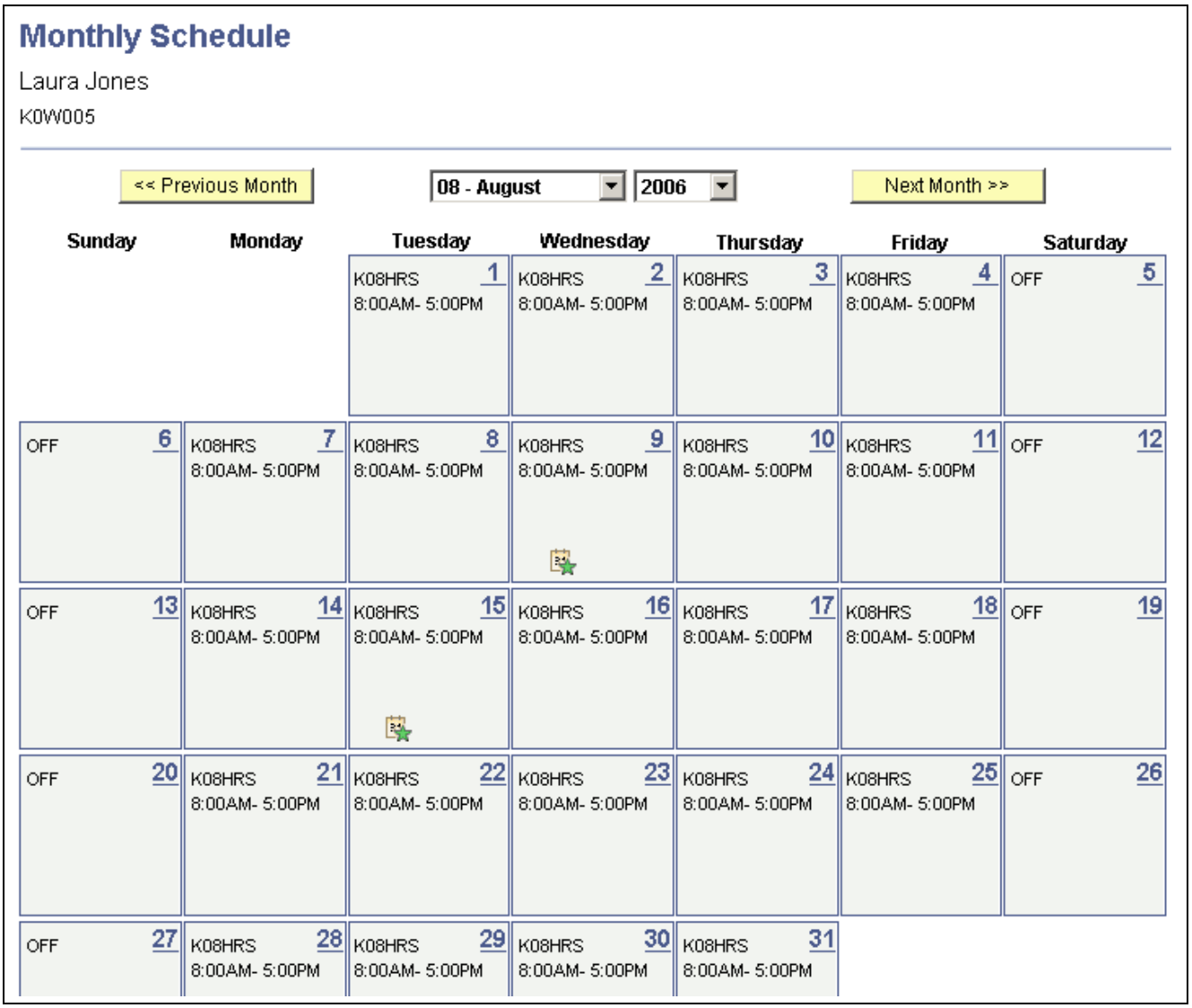
The Details page displays information that exists for that day. It shows elapsed hours, punch hours, exceptions with associated recommended actions, payable time, and forecasted payable time, if they exist. The values *X, P, E, $, F,* or *R* that are on the Time and Labor Launch Pad page indicate what 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.

Monthly Schedule and Details

Access the Monthly Schedule page.

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Monthly Schedule page

Access the Monthly Schedule - Daily Detail page.

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Monthly Schedule - Daily Detail page

On the Monthly Schedule page, if a punch or flex schedule is displayed for the day, the daily cell of the monthly schedule will display the Shift ID, the number of Scheduled Hours, and the start and end time of the shift. If an elapsed schedule for the day is displayed, the Shift ID and Scheduled Hours will be displayed in the daily cell of the month. If there is more than one shift for the day, the daily cell will display *More shifts...* and all the shift information will be displayed on the Daily Detail page.

Users can link to their Schedule Preferences page from the Monthly Schedule page to update or view their preferences. Users can use the Notify button from the Monthly Schedule or Daily Detail pages, to alert their manager of changes they would like made for their schedule. Employees can also navigate to other self service and time reporting pages from the Monthly Schedule page.

The user can click on the calendar date to drill into the daily detail of the schedule. On the Daily Detail page the user can view details of the primary or alternate schedule. Training details from Training Administration or Learning Management are displayed with the start and end time of the training. Absence details from PeopleSoft Absence Management or leave reported for Base Benefits is displayed with the number of hours for the absence. Holiday details are displayed with the name of the holiday and the number of hours for the holiday.

Setting Up User Preferences

This section provides an overview of using user preferences and discusses how to set up user preferences.

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Pages Used to Set Up User Preferences

Page Name	Object Name	Navigation	Usage
Time Reporting Preferences	TL_TR_EE_PREF	Self Service, Time Reporting, User Preferences, Time Reporting Preferences	Enables employees to view and update their time reporting preferences.
Schedule Preferences	SCH_EE_PREF	Self Service, Time Reporting, User Preferences, Schedule Preferences	Enables employees to view and update their schedule related preferences.
Send Notification	PT_WF_NOTIFY	• Self Service, Time Reporting, User Preferences, Notify button. • Self Service, Time Reporting, User Preferences, Schedule Preferences tab, Notify button.	Enables employees to email managers, supervisors, or other employees when they change their user preferences.

Understanding the User Preferences Page

The User Preferences page is used by employees to set up their schedule and time reporting preferences, such as preferred shifts and times, and time related defaults to display on the Timesheet page.

When setting up or changing an employee's schedule, a manager can view an employee's schedule preferences in the Manage Schedules feature, and take that information into account for future schedule creation and changes.

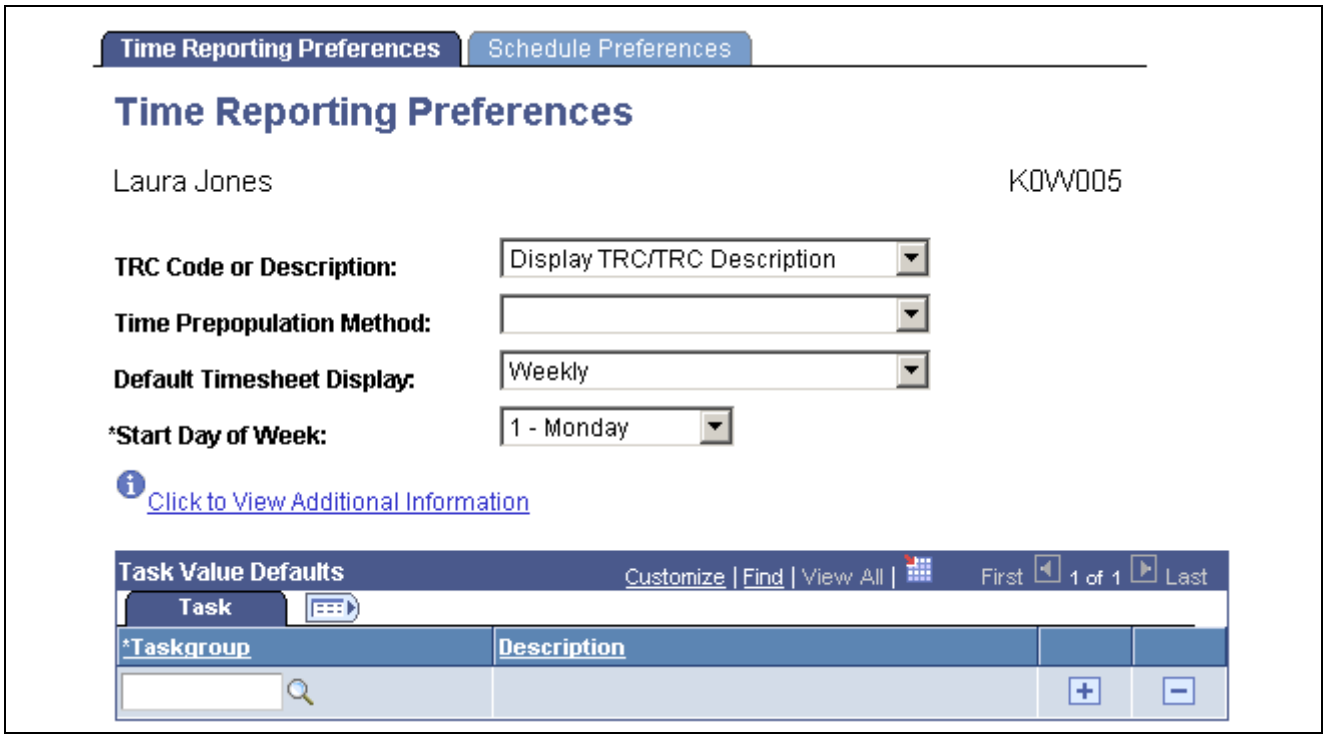
When a manager is viewing or reporting time for an employee using the Timesheet page, certain time reporting preferences that the employee sets up will appear on the Timesheet page, such as Start Day of Week and Task Values.

Employees can also email managers, supervisors, or other employees when they change their user preferences.

Setting Up User Preferences - Time Reporting

Access the Time Reporting Preferences page.

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Time Reporting Preferences page

Employees use this page to set up and maintain their specific time reporting preferences and configuration options. The preferences that employees specify on this page will be reflected on various time reporting pages such as the Timesheet, Mass Time, Web Clock, and the Adjust Paid Time pages.

TRC Code or Description

Select *Display TRC Code/Description* (which is the default) or *Display TRC Description/Code.* This configuration option will determine in what order the Time Reporting Code is displayed and sorted when viewing the Time Reporting Code field on the Timesheet, Mass Time, Web Clock, or Adjust Paid time pages.

Time Pre-population Method

Select a value to automatically populate the employee Timesheet page with default information to use when reporting time. Valid values are *Task Values, Prior period,* and *Schedule Information.*

When opening the page, the Timesheet will automatically populate an employee's default Taskgroup that is specified on the Maintain Time Reporter Data page. If an employee is a task template reporter, then when opening the Timesheet the system will look at the Employee User Preferences page to see if any default task values have been specified.

If an employee is a task profile reporter, the Timesheet will just use what is defined as the default task profile either from Maintain Time Reporter Data or from the taskgroup displayed on the Timesheet, and not look at the User Preferences.

Select *Prior Period* to provide default values from the prior period. This pre-population method works for employee access, not for manager access of an employee timesheet.

Select *Schedule Information* to provide default values from the employee's current schedule. This pre-population method works for employee access, not for manager access of an employee timesheet.

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Blank (which is the default) to specify no default value.

Default Timesheet Display Choose *Daily, Weekly,* or *Time Reporting Period. Weekly* is the default. This option determines if time displays on the Timesheet in a day, week, or time period format.

Start Day of Week Select the default day for the week to start when using the Timesheet page. This field is applicable only when you select *Weekly* in the Default Timesheet Display field.

Note. If Time and Labor is not installed, the Time Reporting Preferences page is hidden.

Understanding Task Value Defaults

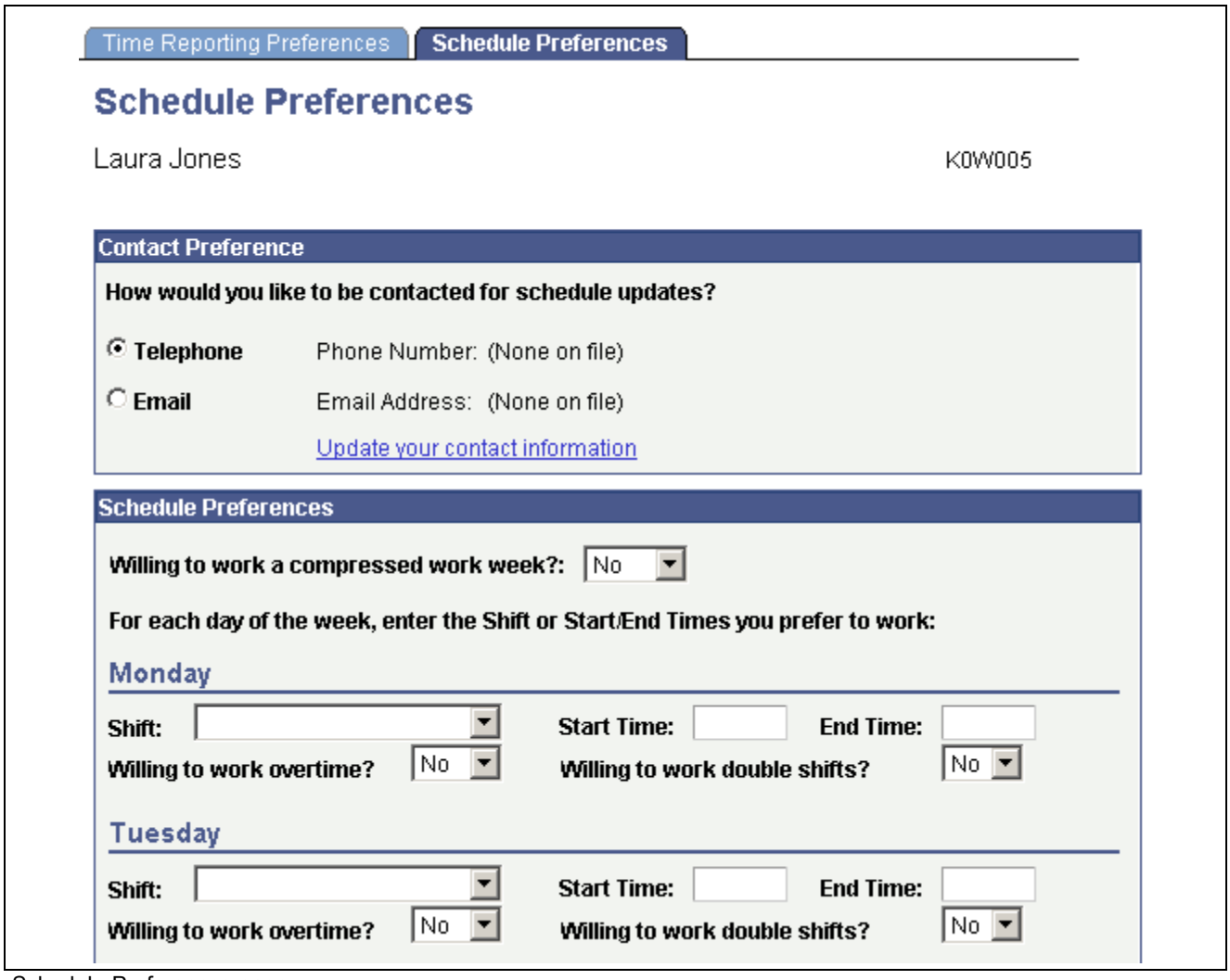
Use this section with the time prepopulation method of task values. You can enter one or more rows for the same taskgroup, or enter a set of default task values for different taskgroups.

When you enter a taskgroup, the display of fields is dependent on the time reporting templates associated with that taskgroup. If the elapsed and punch reporting templates have Task Profile selected, then no task values will appear. If one or both of the time reporting templates designate Task Template, then the default task values can be used. If task values can be used, they will be dependent on the task template ID associated with each taskgroup entered. The task template drives the display of the Task Reporting Elements and ChartFields folder tabs in this section. Task values entered on the Time Reporting Preferences page will only be utilized for timesheet display if the Time Prepopulation method is Task Values.

Setting Up User Preferences - Schedule Preferences

Access the Schedule Preferences page.

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Schedule Preferences page

All fields on this page are optional, with the exception of the Telephone/Email option and the Willing to work fields. The Willing to work fields have a default value of *No*.

Contact Preference

The employee's preferred phone number and email address appear. To change them, access the Update your contact information link, which takes the user to the Personal Information page. Phone, email, and other contact information can be viewed and modified. The link to employee's contact information is only available for editing if eProfile is installed on the General Installation page.

Schedule Preferences

For each day of the week, enter the shift or start and end times you prefer to work.

Willing to work a compressed work week Define whether or not you would be willing to work a compressed work week.

Shift Enter the shift you prefer to work. This field is populated based on the particular EmplID. If the current user has a schedule assigned, the only shifts available in the drop-down list box are those shifts that correspond to the user's

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schedule ID and the SetID determined by the user's schedule group. If the user has no schedule assigned, the Shift ID field is hidden.

Note. There is no validation between start and end times and shifts. No logic exists to verify that the times entered fall within the shift, if one is entered.

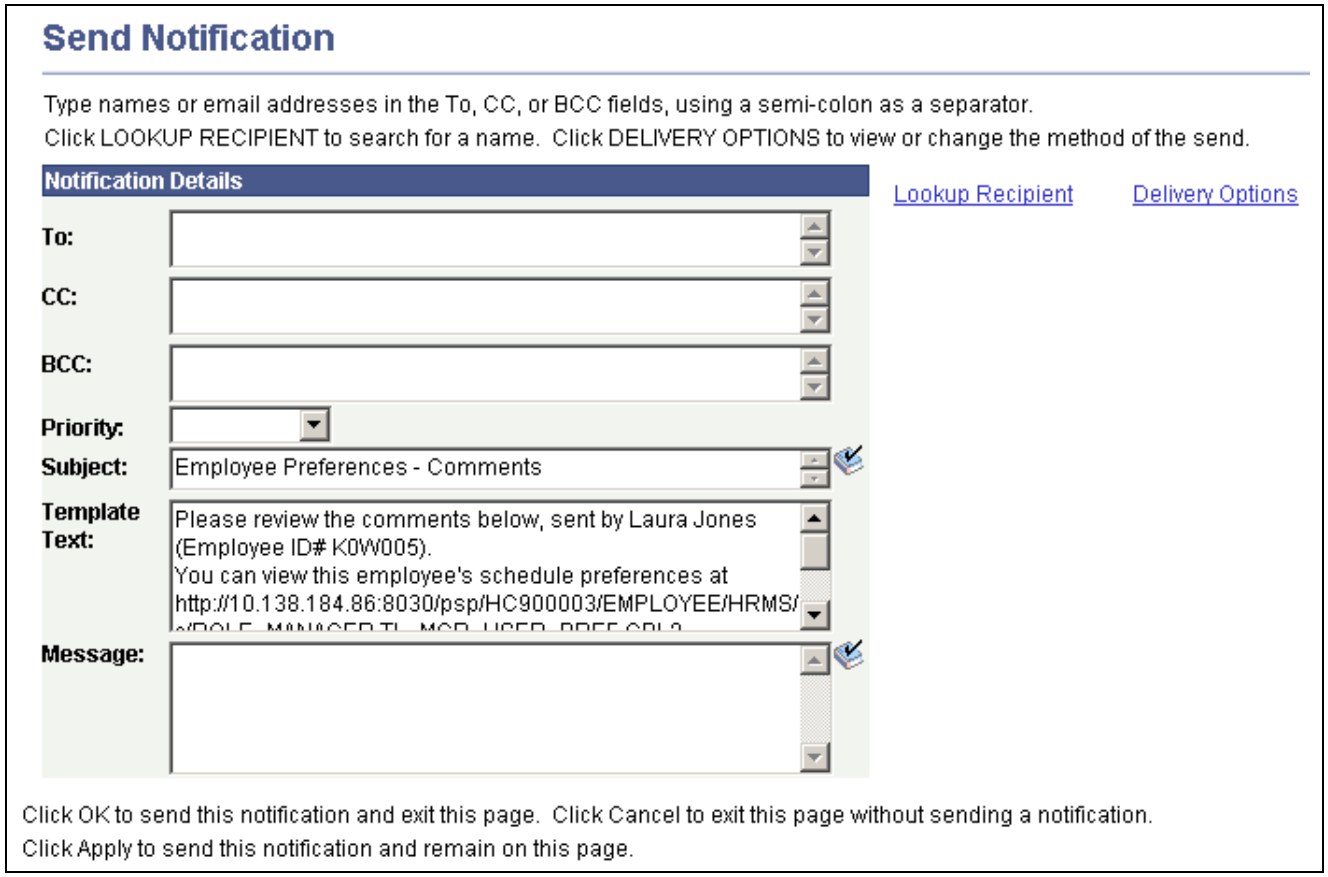
Start Time, End Time Enter the start and end times you prefer to work.

Willing to work overtime Enter whether you would be willing to work overtime.

Willing to work double shifts Enter whether you would be willing to work a double shift.

Setting Up User Preferences - Send Notification

Access the Send Notification page.



Send Notification page

Click on the Notify button to access the Send Notification Page. Use this page and the links provided to email managers, supervisors, or other employees when you change your user preferences.

Reporting Time

This section lists common elements and discusses how to:

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- Enter, view, or change employee's time.
- Enter single punches through the web clock.
- Use mass time.
- Specify a time reporting method for mass time reporting.
- Specify report time for mass time reporting.
- View compensatory time and expiration.

Common Elements Used in this Section

Time Reporting Elements and **Task Reporting Elements**

The self-service pages that *employees* use to report time include fields for selecting time reporting and task reporting elements. The employee's time reporting template determines which fields appear on the self-service pages. Should data be reported in error for invalid time or task elements (through TCD, Mass Time, or Rapid Time Reporting pages, for example), those time reporting or task fields will appear so that employees can make corrections, even if those fields are not chosen on the employee's time reporting template.

Timesheet Page

Both punch time and elapsed time are reported using the Timesheet navigation component. When selected, the system determines whether the employee has multiple jobs. If multiple jobs exist, the Select Job Title page appears, with links for each job. If the time reporter has only one job, the Select Job Title page does not appear, and the time reporter is taken directly to the appropriate Timesheet page. The Timesheet page displays either the punch time page (TL_RPTD_PCH) or elapsed time page (TL_RPTD_ELP) based on the Time Reporter Type value selected on the Create or Maintain Time Reporter Data pages.

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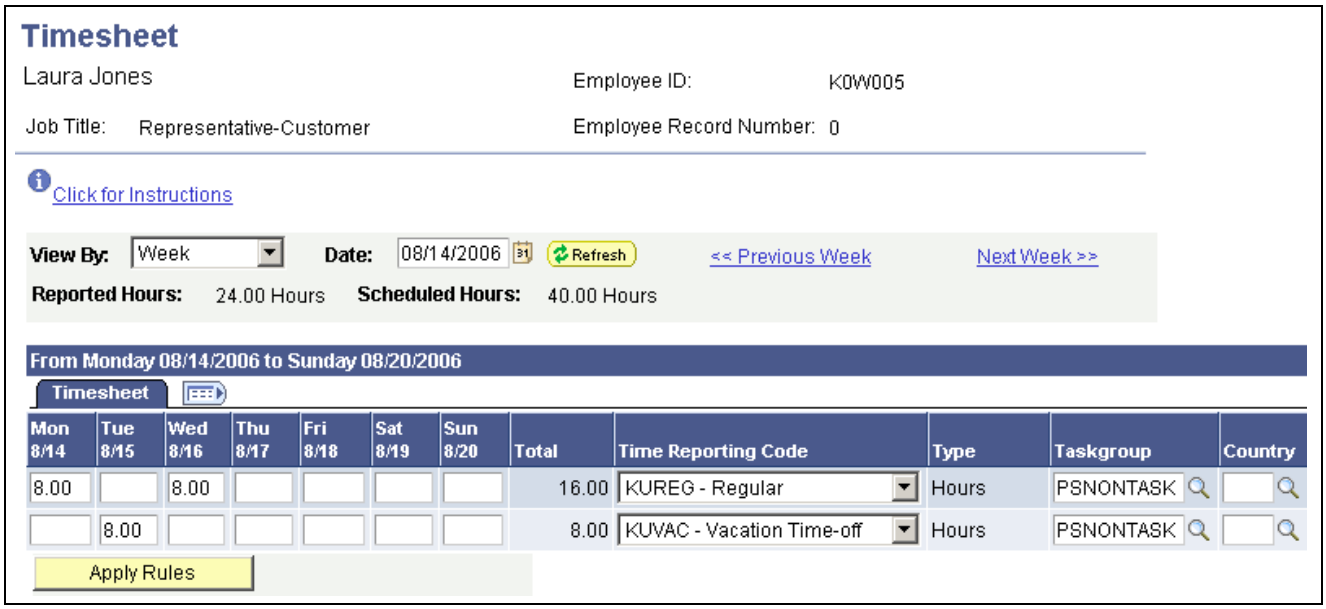
Pages Used in Reporting Time

Page Name	Object Name	Navigation	Usage
Timesheet	TL_RPTD_PCH , TL_RPTD_ELP	Self Service, Time Reporting, Report Time, Timesheet, Timesheet	Report time and task details for a day, week, or time period for either punch or elapsed time reporters.
Select Job Title	CO_MULTI_JOB_SRCH	Self Service, Time Reporting, Report Time, Timesheet	Enables employees with multiple jobs to select the job for which they want to view or report time. The page lists both punch time and elapsed time jobs, and includes terminated jobs.
Web Clock - Enter Punch	TL_WEBCLK_ENTR_PCH	Self-Service, Time Reporting, Report Time, Web Clock, Web Clock	Enables employees to enter a single In, Break, Meal, Out, or Transfer punch. Employees can provide time and task detail when entering punches. Includes links to pages for viewing overtime requests and the holiday schedule.
Save Confirmation	TL_WEBCLK_CONFIRM	Click the Enter Punch button on the Enter Punch page.	Confirms the date, punch type, time zone, and punch type reported through the Web Clock - Enter Punch page.
Mass Time Reporting - Select Time Reporting Method	TL_MASS_TIME_SELF, TL_MASS_SELF_SAVE	Self Service, Time Reporting, Report Time, Mass Time Click Next on the Mass Time Reporting - Select Time Reporters page.	Specify the range of dates and the method for reporting time.
Mass Time Reporting - Report Time	TL_MASS_TIME_SELF, TL_MASS_SELF_SAVE	Self Service, Time Reporting, Report Time, Mass Time Click the Next button on the Mass Time Reporting - Select Time Reporting Method page.	• Indicate additional attributes about the time that you are reporting. • Report additional Time Reporting Elements and Task Elements.
Compensatory Time	TL_COMPTIME_PNL	Self Service, Time Reporting, View Time, Compensatory Time, Compensatory Time	View compensatory time balance and expiration information.

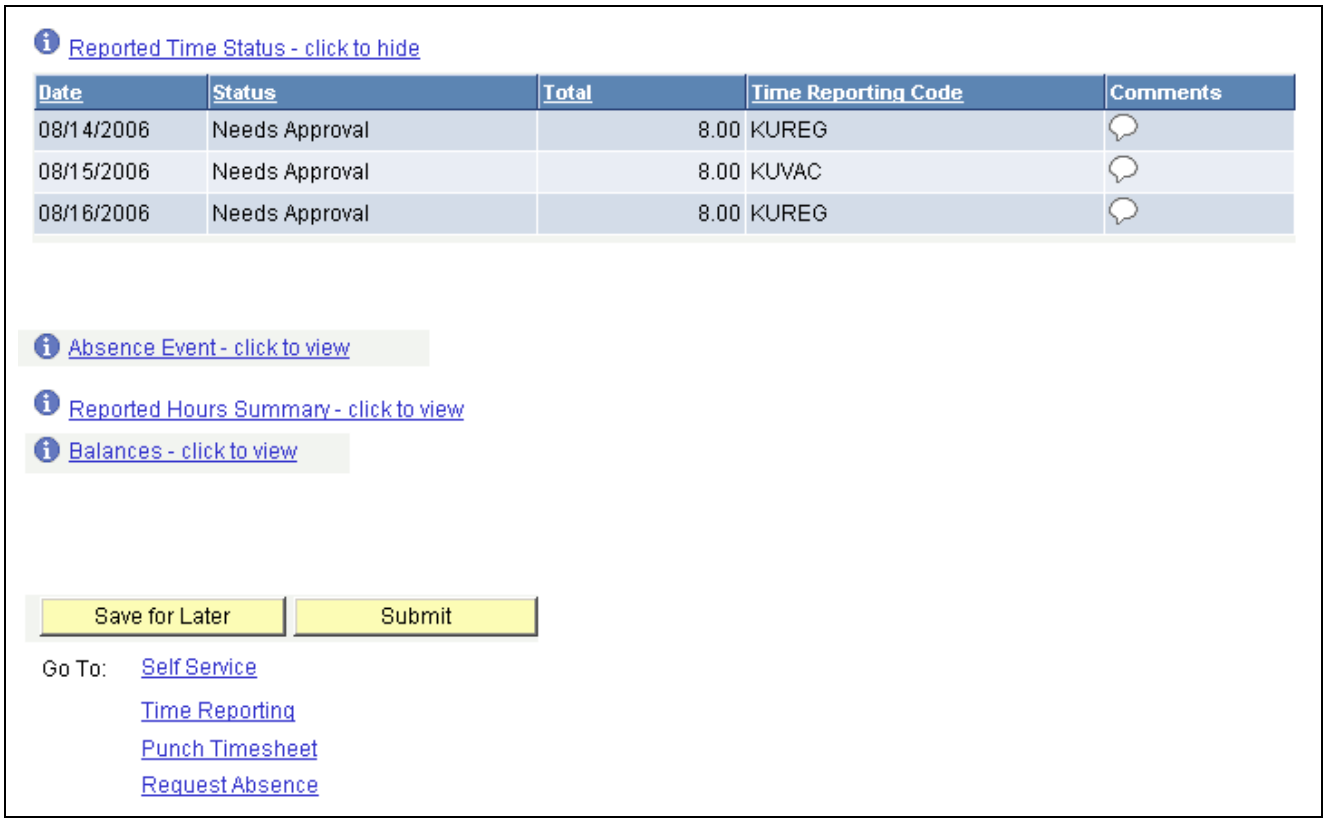
Entering, Viewing, or Changing Employee's Time

Access the Timesheet page.

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Timesheet page 1 of 2



Timesheet page 2 of 2

The Days, Total, TRC and Type fields are based on the related time reporting template. The remaining fields are based on the task reporting template.

Click for Instructions Use this link to view instructions on how to use this page. To hide the instructions, click the Click to hide Instructions link.

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View By The defaults for the View By field are set on the User Preferences page. Values are *Day*, *Week*, or *Time Period*.

Date, Refresh If you change the Date field, click the Refresh button to update the page.

Previous Day, Previous Week, Previous Time Period, Next Day, Next Week, Next Time Period Use the requisite link to view the previous or next time reporting period.

If you use one of these links, additional text appears to let the user know that reported time is being entered for a prior or future period.

Reported Hours This field is updated when the Save for Later or Submit buttons are clicked.

Scheduled Hours The value is displayed when you access the Timesheet page.

Total This field is updated when the Save for Later or Submit buttons are clicked. This field displays the total hours per row.

Time Reporting Code If applicable enter a Time Reporting Code.

Type This field is updated when the Save for Later or Submit buttons are clicked. It shows the TRC's related Type — *Amount*, *Hours*, or *Units*.

Taskgroup If applicable, enter a related taskgroup.

Billable Select this field if the hours entered are billable.

Task Profile ID If applicable, enter a related task profile ID.

Apply Rules Click this 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 entered on this page. If absence event data is entered in the Absence Event grid, the Apply Online Rules process generates absence payable time with the status Online Estimate (OE).

If any exceptions are generated, the Manage Exceptions page is displayed automatically after the process completes.

If no exceptions occur and payable time is created, the View Payable Time Detail page appears with the rows of estimated time that were created from the online rules. The Apply Online Rules process does not generate payable time estimates when the reported time has the status Needs Approval (NA).

Note. This button is displayed only if the Run Online Rules feature is activated on the Time and Labor Installation page.

Reported Time Status Click this link to show or hide the Reported Time Status grid. Fields displayed are Date, Status, Total, Time Reporting Code and Comments. Click the icon in the Comments column to add a comment for a row.

Note. This grid applies only to elapsed Timesheets (not punch).

Absence Event Click this link to display the Absence Events grid and add absence information. Depending on the setup of Absence Management, you may be enabled to report, save, submit, and approve or deny (managers only) absence events within the range of the Timesheet dates.

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Note. This link is displayed only if the Time and Labor system is integrated with Global Payroll or Absence Management.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Entering and Approving Self Service Absence Requests".

Reported Hours Summary Click this link to show or hide the Total Reported Hours values to obtain a summary of reported hours.

Balances Click this link to show or hide the Balances information. Information can include sick or vacation balances, and your absence entitlement balance if the time reporter is active in the Absence Management system.

Save for Later Use this button to partially enter a timesheet and to complete at a later date. Enter information on the page each day and submit at the end of the reporting period. When using this button a page appears, asking whether the user would like to check for errors.

Submit Use this button to submit the Timesheet.

Request Absence Click this link to access the Request Absence page. That page has a link to return to the Timesheet page.

See *PeopleSoft Enterprise Absence Management 9.0 PeopleBook*, "Entering and Approving Self Service Absence Requests".

Note. TRCs that are set up with the Absence Flag check box selected on the TRC1 page are not displayed on the online time reporting pages (Timesheet, WebClock, and Mass Time). Consequently, you cannot report time using an Absence TRC on these pages. TRCs that have the Rules Only TRC check box selected on the TRC1 page are not displayed on any of the time reporting or scheduling pages, except the Adjust Paid Time page.

Timesheet Display: Self-Service Versus Manager Self-Service

The Timesheet page displays different information when accessed from the Self-Service component compared to the Manager Self-Service component. The User Preferences page also plays an important role in the Timesheet display.

Task Value Prepopulation

The following is true when viewing either the Self-Service Timesheet (as an employee) or the manager Timesheet (a manager viewing an employee's timesheet):

- To determine what task information to display on the timesheet, the system needs to determine if the employee is a task template or task profile reporter and if task value defaults are present in User Preferences. The determination of the employee's type of task reporting is first based on whether the page displayed is the Punch or Elapsed Timesheet. This page display is determined by the employee's time reporter type of Punch or Elapsed on the Maintain Time Reporter Data page.
- Then, depending on the elapsed or punch timesheet display, the system checks for that same type of time reporting template on the Maintain Time Reporter Data page. If no time reporting template exists on Maintain Time Reporter Data, it will check for the default time reporting template on the Task Default Values group box of the Time Reporting Preferences page, or for one on the employee's default taskgroup on Maintain Time Reporter Data. The time reporting template determines if the task profile or the task elements should appear on either the punch or elapsed timesheet.

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- If the derived time reporting template is setup to use a task template, then any task information that is populated in the Task Default Values group box of the Time Reporting Preferences page will be used, when the time prepopulation method of task values is specified. If no default task values are specified on Time Reporting Preferences, then the timesheet displays the employee's default taskgroup and related task element fields. If there are multiple rows defined for Task Default Values, they will be displayed as multiple rows on either the Punch or Elapsed Timesheet
- If an employee is a Task Profile reporter, the Timesheet will just use what is defined as the default Task Profile, either from Maintain Time Reporter Data or from the taskgroup displayed on the Timesheet, and not look at the User Preferences.

Examples of Timesheet display with User Preferences

The system is configured as follows:

Time Reporter Data			
	Time Reporter Type	*Time Reporting Template*	*Default Taskgroup*
ELAPSED	Enabled	Task Element Reporting	Task Element Reporting
PUNCH	Blank	Blank	Task Element Reporting

The User Preferences

Prepopulation Method = Task Values

Task Value Default

Selected Taskgroup has associated Time Reporting Template IDs to reflect:

- Elapsed – Task Element Reporting
- Punch – Task Profile Reporting

Task values are entered for all associated task elements.

Elapsed Timesheet

The system prepopulates the timesheet with the taskgroup and task values that are reflected on the User Preferences page. Prepopulated task values can be used because the time reporter's elapsed time reporting template on the Maintain Time Reporter Data page uses task element reporting,

Punch Timesheet

The timesheet displays the taskgroup and associated task elements from the default taskgroup on the Time Reporter Data page. Prepopulated task values from User Preferences cannot be used, as the time reporter does not have a punch time reporting template on the Maintain Time Reporter Data and the punch time reporting template associated with the taskgroup on User Preferences uses task profile.

Schedule Information Prepopulation

If your schedule has tasks associated with it, in order for the scheduled tasks to prepopulate on the timesheet, the employee needs to be set up as the same type of task reporter that the system defines on the schedule.

The display of task profile or task elements on the timesheet is first derived from the Maintain Time Reporter Data page to see if a Time Reporting Template is listed. This is true for both Punch and Elapsed Timesheets.

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- If none exists on Maintain Time Reporter Data, then the timesheet display will derive the time reporting template of the scheduled taskgroup, to determine whether to use task profile or task template.
- If the schedule is composed of shifts, then the system uses the taskgroup associated with the shift. If the schedule is not using shifts, then the system uses a taskgroup associated to the schedule.

Employee User Preferences and Manager Timesheet Display

When viewing an employee's time on the Timesheet page, a manager sees the following default settings:

- TRC Code/TRC Description: Display the preference from the manager's own user preferences, not the employees.
- Time Prepopulation Method: Display the default task values as mentioned previously. The Manager Self-Service Timesheet will not prepopulate with the employee's scheduled time, or prior period time.
- Default Timesheet Display

  (View by): Display the preference from the manager's own user preferences, not the employees. However, if the manager changes the Date and View by setting while on the Timesheet page, and then clicks on Next Employee or Previous Employee, those settings will remain - they do not return to today's date and the default View By setting. For example, if the manager changes the date to January 1, 2004 and View By *Time Period*, when clicking on the Next Employee button, the time period displayed is for January 1, 2004 for the next employee.
- Start Day of Week: Display the preference from the manager's own user preferences, not the employees.

The Timesheet will display existing time in the database in the following way:

- Time Reporting Elements:

  Employees only see those fields that are specified on the Time Reporting Template.

  For managers, if the field, Show all Time Reporting Fields, is selected on the Time Reporting Options group box of the Time and Labor Installation page, then the manager will see all time reporting elements displayed. If this is not selected, than the manager will see only those fields that are specified on the Time Reporting Template, and those fields that have values.
- Task Elements:

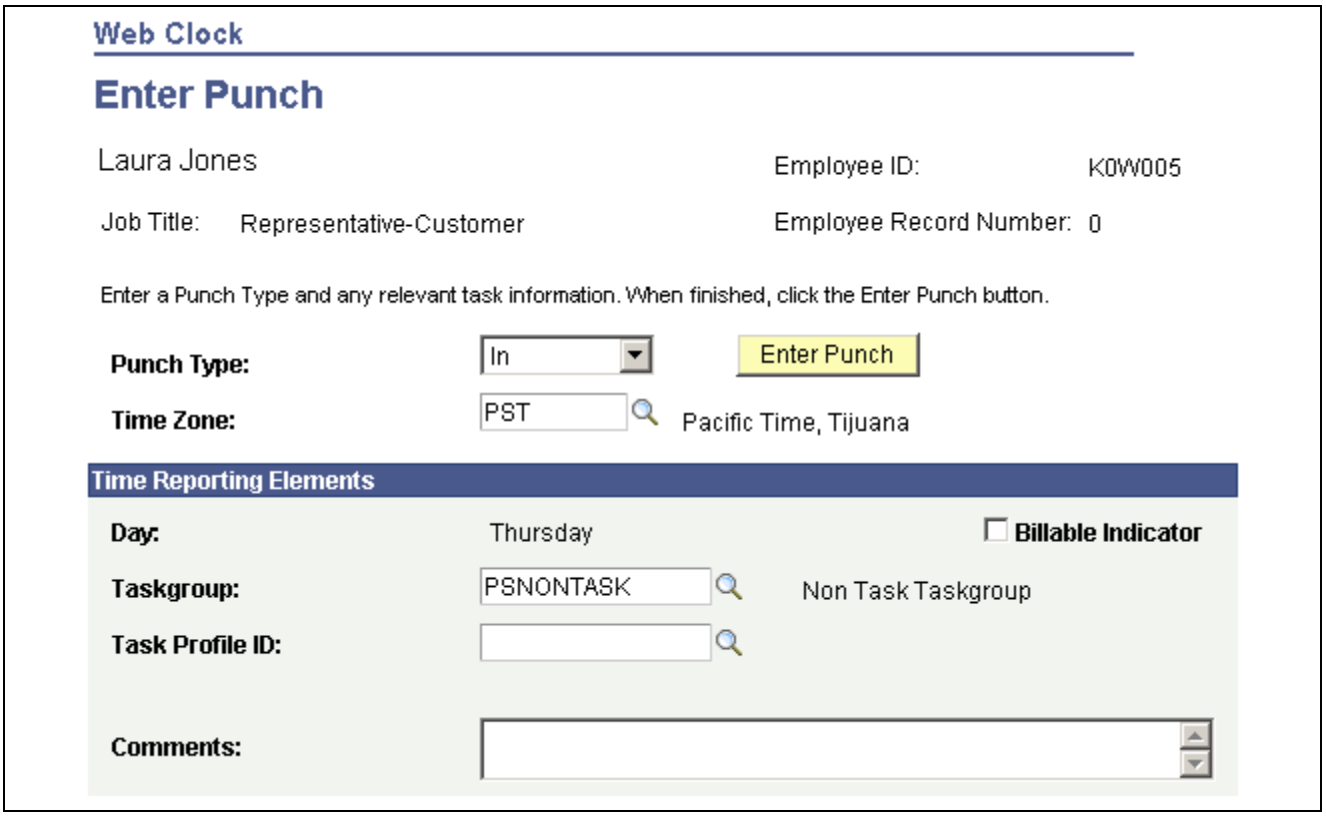
  Employees see those fields that are specified on the Task Template, and those fields that have values.

  Managers see those fields that are specified on the Task Template for the employee, and those fields that have values.

Entering Single Punches Through the Web Clock

Access the Web Clock - Enter Punch page.

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Web Clock - Enter Punch page

Punch Type Select a punch type: *In, Out, Meal, Break,* or *Transfer.*

Enter Punch Click after you've selected the punch type and entered element and task information. The system uses the current date and time for the punch and applies the same validations that are used for the Timesheet page.

Time Zone By default, the system uses the employee's time zone as defined on the Create Time Reporter Data page in Time and Labor; you can override the time zone during data entry.

Task Reporting Elements

These fields only apply to *In* and *Transfer* punches.

Using Mass Time

Use the Mass Time Reporting feature to save time and keystrokes when reporting time. It enables you to easily report different attributes of time for a period rather than having to enter them manually for each day in the specified period.

The Mass Time Reporting feature enables you to report time in several different ways by using a template type format. You enter the period of time for which you want to report time and select the method that Time and Labor uses to generate reported time.

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Understanding Mass Time

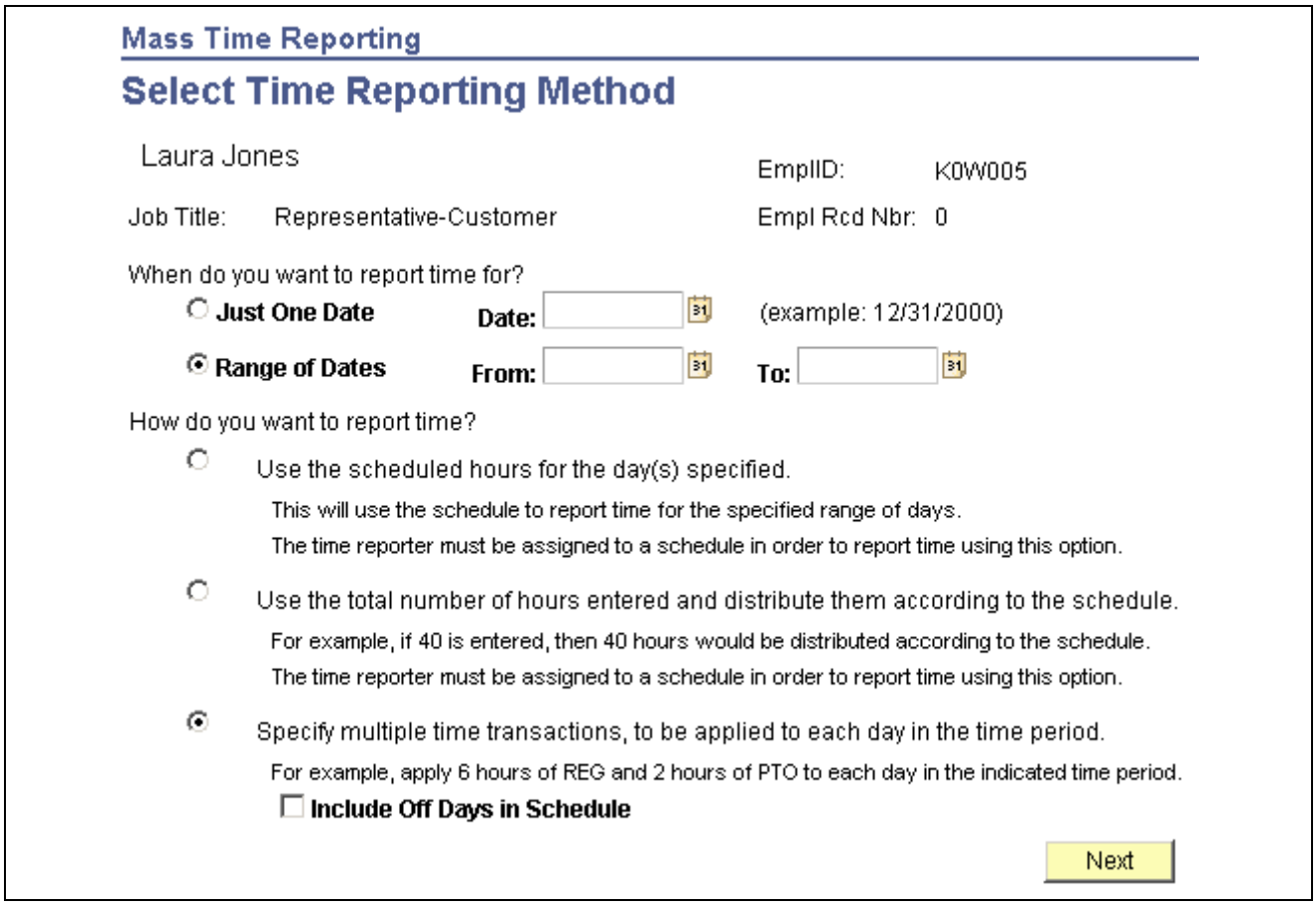
The options in the How do you want to report time? section of the Mass Time Reporting page function differently depending on whether the Regenerate Reported Time check box is selected on the TL Installation page and whether the Create Partial Work Hours for Partial Absence check box and Exclude Holiday for Generating Time check box are selected on Workgroup page.

- If the Regenerate Reported Timecheck box is selected, then the total number of hours of reported time generated for any day will not exceed the number of hours scheduled for that day. The total number of hours is the sum of absence time taken, compensatory time taken, leave time taken, and non-compensatory leave time taken, less compensatory time earned.
- If the Create Partial Work Hours for Partial Absence check box is selected, then on any day on which a partial absence is reported, the system will generate reported time in the manner described in the previous paragraph. If this check box is cleared, no time is generated by Mass Time on any day on which a partial absence is reported.
- If the Exclude Holiday for Generating Time check box is selected, Mass Time will not generate any reported time on days defined as holidays, even if scheduled hours exist on those days.

See Chapter 4, "Setting Up Basic Tables," Setting Up System Defaults and Loading Dates, page 26 and Chapter 5, "Establishing Workgroups," Setting Up Workgroups, page 77.

Specifying a Time Reporting Method for Mass Time Reporting

Access the Mass Time Reporting - Select Time Reporting Method page.



Mass Time Reporting - Select Time Reporting Method page

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Just One Date	To report time for just one day, enter a date in this field.
Range of Dates	To report time for a range of dates, enter beginning and end dates in these fields.

You can report time in one of three ways using the Mass Time Reporting feature:

1. Use the scheduled hours for the days specified.

   Use this option to report time according to your schedule. If you (or your employees, if you are a manager) 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 for the dates that you specified. For example, 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 looks at how your schedule is built for that particular date range and generates reported time for the same number of hours for those dates. You must be assigned to a schedule for reported time to be generated using this option.

2. Use the total number of hours entered and distribute them according to 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 enter 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. You 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 be distributed according to your schedule. If the number of hours you report is short or over that which is indicated in the schedule, those hours are applied to the last day.

   ---

3. Specify multiple time transactions to be applied to each day in the time period.

   Use this option to report time and specify multiple transactions for the system to apply to the specified date or date range. For example, 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 in your date range, excluding your regular days off. You need to be assigned to a schedule to report time using this option.

   If you select this Mass Time reporting option, then the Include Off Days in Schedule check box appears below this selection. This check box affect how reported time is generate in these ways:

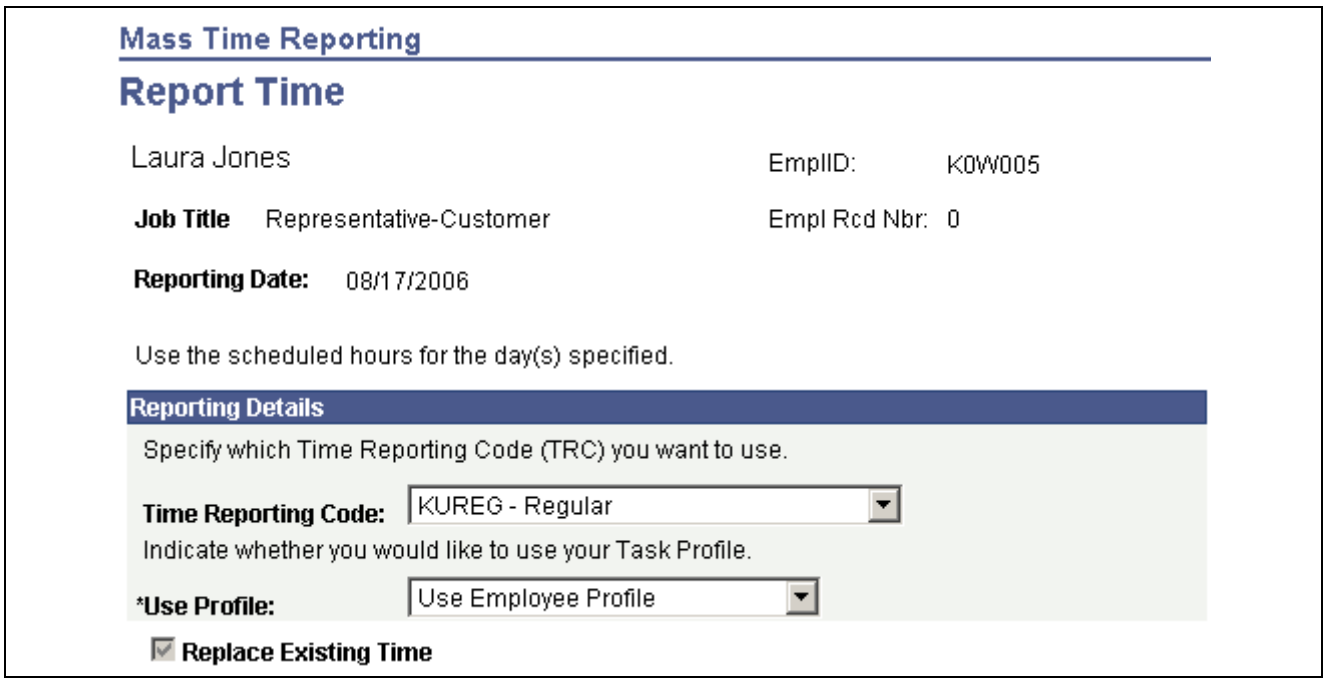
   - If you have an assigned schedule and this check box is cleared, then reported time is created only for workdays and not scheduled days off.
   - If you have an assigned schedule and you select this check box , then reported time is created time for all days in the schedule.
   - If you do not have an assigned schedule, reported time is created for all days in the date range you enter regardless of the setting of the Include Off Day check box, `based on the data you enter on the Reporting Details grid on the Mass Time Reporting – Report Time page.

Click the Next button to continue on to the Mass Time Reporting - Report Time page.

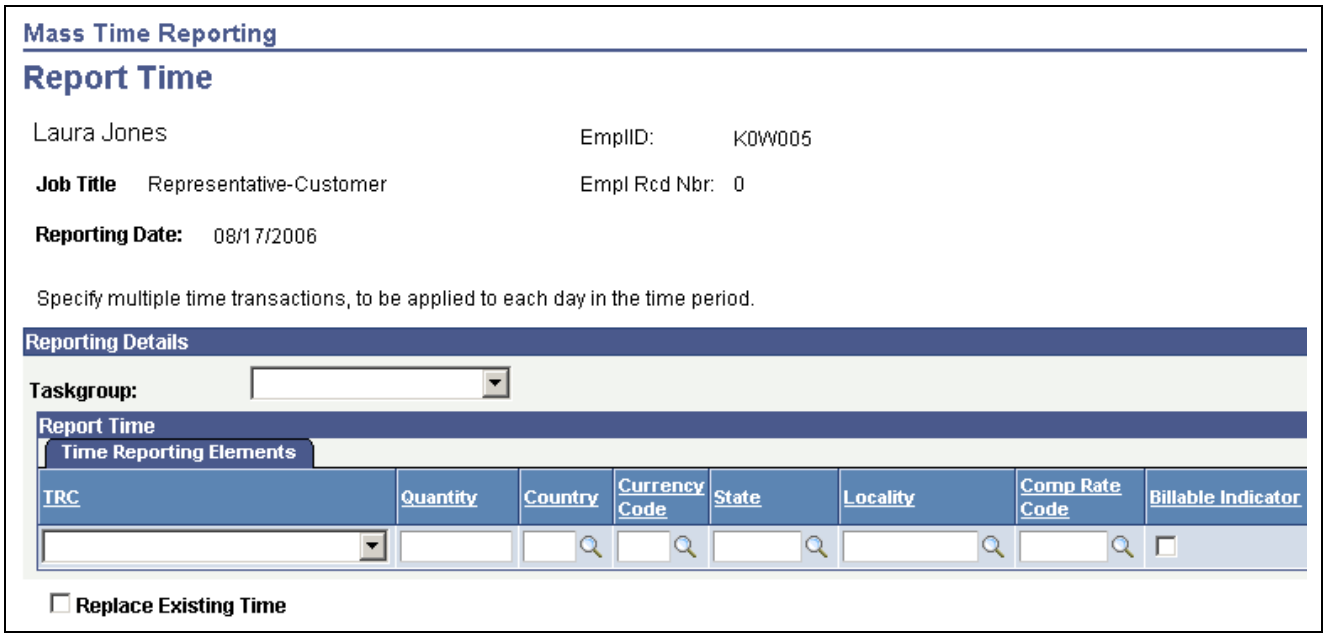
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Specifying Report Time for Mass Time Reporting

Access the Mass Time Reporting - Report Time page.



Mass Time Reporting — Report Time



Mass Time Reporting - Report Time page when Specify multiple time transactions, to be applied to each day in the time period selected

Specify which Time Reporting Code (TRC) you want to use

Enter a time reporting code (TRC) in this field to specify which method to use for processing the time worked. Every active TRC that is set up in the system appears here, unless it is specified as a “Rules Only” TRC. If it is a rules only TRC, then it will only be used in processing rules and will not show up on the time reporting pages. Select a TRC that is attached to the TRC program assigned to the employee for whom you are reporting time. If

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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.

Note. On the previous page, if the Use the scheduled hours for the day(s) specified or the Use the total number of hours entered and distribute them according to the schedule option was selected, and a TRC is being used, if the selected employee has a punch schedule, then a TRC will be inserted with the punch scheduled time. If the user decides to report a TRC with punch time, then the new rule Template 135 should be reviewed, in order to determine if all punch time rows with a TRC should be paid or paid with a different TRC.

If a TRC is not specified in this field, and a TRC exists on the employee's schedule, the system uses Scheduled TRC. If there are any other Time Reporting elements on the schedule, these will be used to populate reported time as well.

Use Profile

Select one of the values to define how you want task information applied to reported time. The values for the Use Profile field are:

Use Employee Profile. Select this value to use this profile as the default task profile on the Maintain Time Reporter Data page for reported time.

Use Scheduled Tasks. Select this value to display any task and time reporting information on the employee's schedule to populate reported time.

Use Taskgroup Default Profile. Select this value to use the default task profile on the employee's taskgroup listed on the Maintain Time Reporter Data page.

Submit

Click to submit the time that you reported for processing. The validation process runs, and the system generates exceptions if errors exist. The Submit process updates the employee's status codes and creates reported time. If you selected the Automatic Rules Run option on the Time and Labor Installation page, the Time Administration process runs and creates payable time.

When the Specify multiple time transactions, to be applied to each day in the time period option is selected on the Mass Time Reporting - Select Time Reporting Method page.

Taskgroup

(Optional) If this field is left blank, when time is submitted it appears by default from the employee's assigned Taskgroup, which is indicated on their Time and Labor Employee Data record, or the Taskgroup assigned to the group for which you are reporting.

If a Taskgroup other than the default is reported, this is considered Taskgroup borrowing. When the time is submitted, it uses the task reporting elements associated with the borrowed Taskgroup. The selection of a Taskgroup determines which fields appear on the Task Reporting Elements tab.

Time Reporting Elements, Task Reporting Elements (tab)

If applicable, enter information on the Time Reporting Elements or Task Reporting Elements tabs. Time reporting elements are based on your Time Reporting Template information and the Task Reporting Elements are based on the Taskgroup that is being reported.

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TRC Specify all the transactions that the system is to report for each of the days in the specified date range. Select a TRC in the Specify which Time Reporting Code (TRC) you want to use field on the Mass Time Reporting page to indicate which method the system should use for processing the time worked. Every active TRC that is 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.

Note. This field appears if the second option (use the total number of hours entered) or the third option (specify multiple time transactions) on the Select Time Reporting Method page is selected. A value is required in the Quantity field in order to complete the transaction.

Country, Currency Code, State, Locality, Comp Rate Code, Billable Indicator, Override Rate Enter values in these fields if applicable.

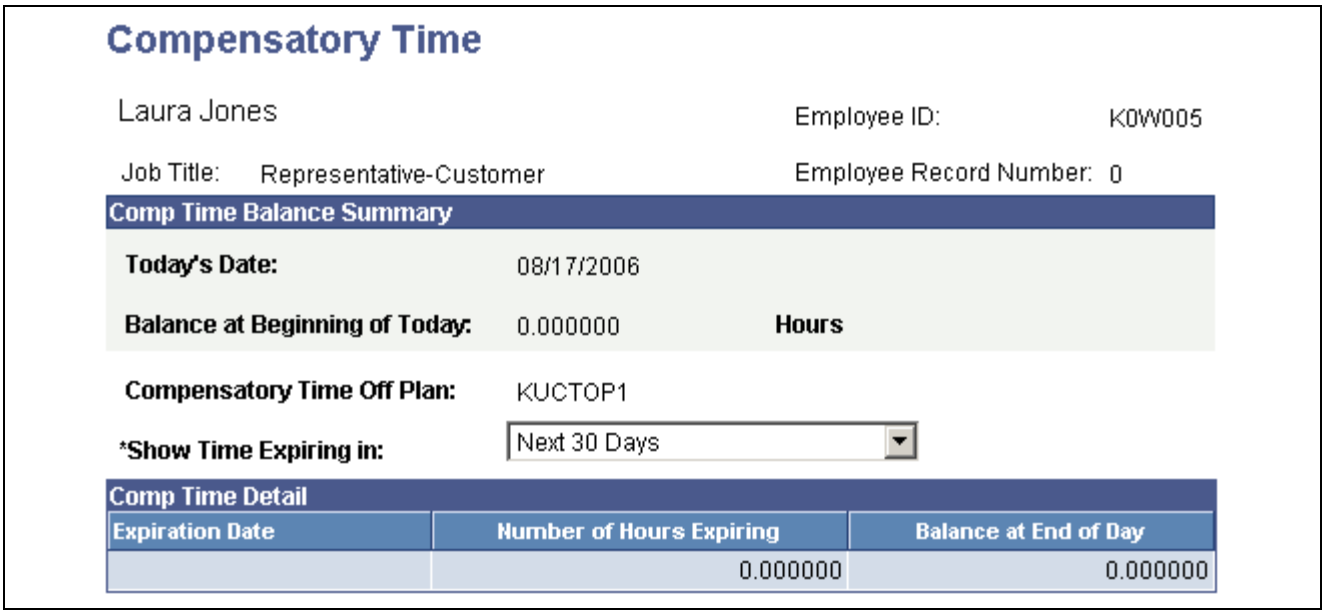
Replace Existing Time This check box is selected by default and cannot be edited if you select the first option for Mass Time reporting. When this check box is selected, only existing time generated through Rapid Time or Mass Time (time that has a reported time source (RT_SOURCE) equal to *SCH*) is deleted. Time generated through the Timesheet page is not deleted (time with a reported time source equal to *SYS*). Time entered through Mass Time is added to any time that was entered through the Timesheet pages.

If you do not select this check box, the system adds the time in this entry to previous data. For example, suppose that you reported eight hours of TRC *REG* for an employee on March 1, 2000. Then you enter two hours of TRC *REG* for the same employee on the same date. If you selected this check box, the system records two hours of TRC *REG* for that day. If you did not select this check box, the system will add two hours of TRC REG to the existing eight hours for a total of ten hours for this date.

Viewing Compensatory Time and Expiration

Access the Compensatory Time page.

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Compensatory Time page

The 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 in the future you want to view compensatory time expiration information. Once you make a selection, the system displays all compensatory time with an expiration date that meets the criteria.

For example, if you select *Next 30 days,* the system displays all the compensatory time expiring within the next 30 days. If the compensatory time has no expiration date, it doesn't appear 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.

Viewing Time

This section discusses how to:

- View a summary of payable time.
- View details of payable time.
- View forecasted time.

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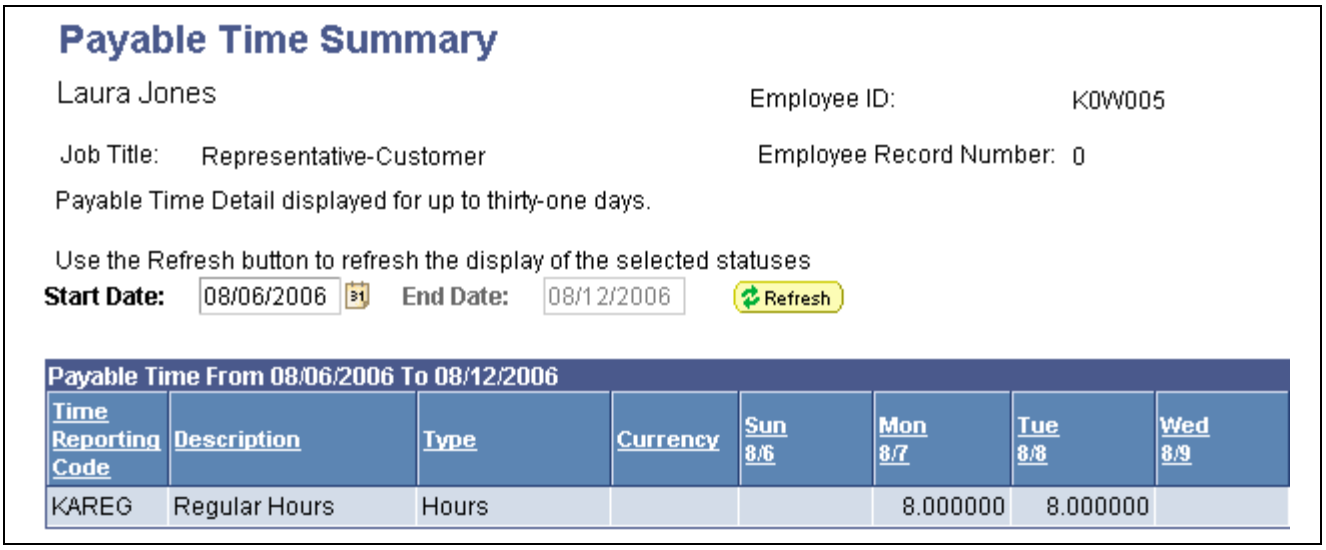
Pages Used to View Time

Page Name	Object Name	Navigation	Usage
Payable Time Summary	TL_TM_MPAY_SUMM	Self Service, Time Reporting, View Time, Payable Time Summary, Payable Time Summary	View the week-by-week summary of payable time by TRC using this display-only page.
Payable Time Details	TL_MNG_PAY_DET_VW	• For manager access: Manager Self Service, Time Management, View Time, Payable Time Detail, Payable Time Detail • For employee access: Employee Self Service, Time Reporting, View Time, Payable Time Detail, Payable Time Detail • 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 the priority of the exception is the determinant. Low priority exceptions enable the system to create payable time; however, higher priority exceptions do not.
Forecasted Payable Time Summary	TL_TM_MPAY_SUMM	• For manager access: Manager Self Service, Time Management, View Time, Forecasted Time Summary • For employee access: Employee Self Service, Time Reporting, View Time, Forecasted Time Summary	View forecasted payable time in summary. The View Forecasted Payable Time Summary page shows the forecast time by employee and by TRC.
Forecasted Time Details	TL_MNG_PAY_DET_VW	• For manager access: Manager Self Service, Time Management, View Time, Forecasted Time Detail, Forecasted Time Detail, Forecasted Time Detail • For employee access: Employee Self Service, Time Reporting, View Time, Forecasted Time Detail, Forecasted Time Detail, 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 the View Payable Time Summary page.

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Payable Time Summary page

The View Payable Time Summary page displays one week's payable time. The time is allocated by date, by TRC, and then by task. For example, if your task profile specifies that your time should be allocated 50 percent to one task and 50 percent to another, then you would see two rows for the same date and TRC. However, on the Payable Time Details page, you can view the details of how it is allocated.

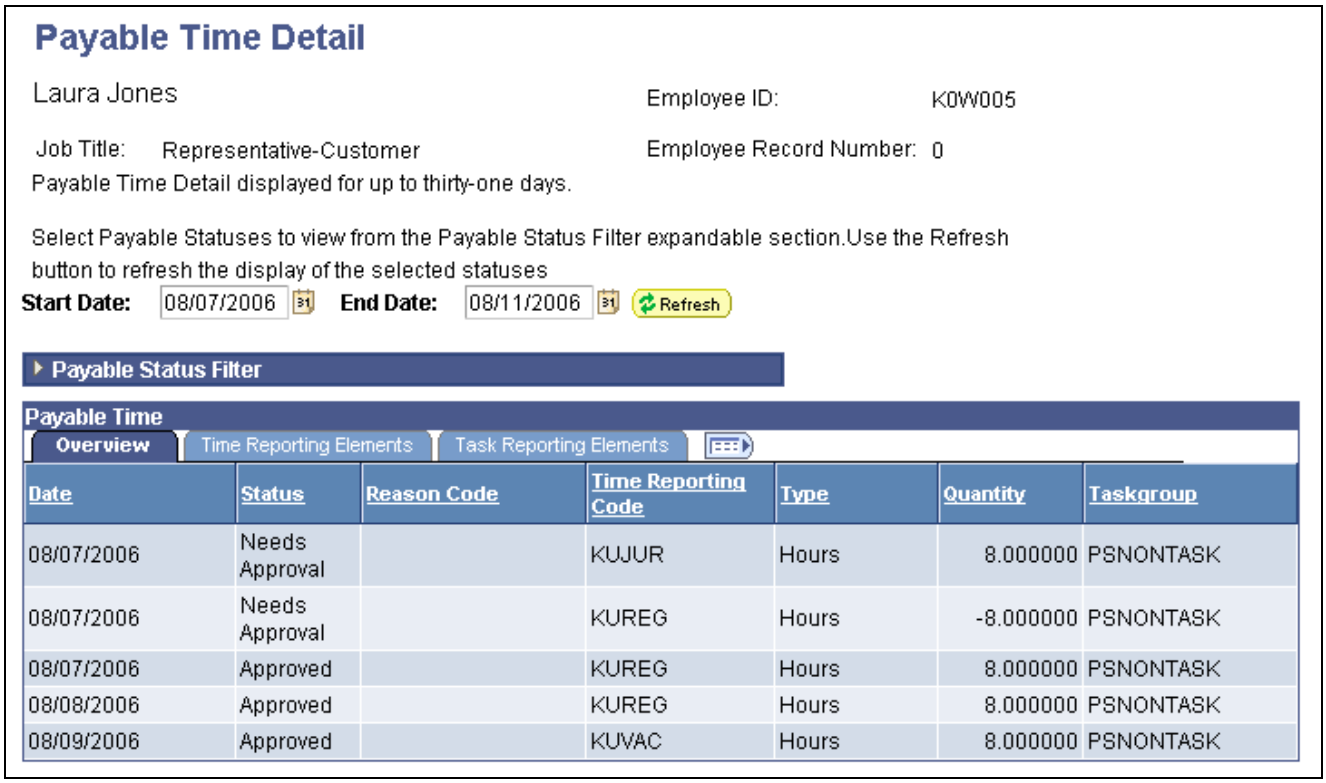
Start Date	Seven days are displayed by default.
Pending Exceptions	This button appears if exceptions were generated. Click to access the Manage Exceptions page.
Previous Week and **Next Week**	Click to view a different week's summary of payable time.
Detail Page	Click this link to access the Payable Time Details page.

Note. Time that has generated exceptions with a "High" severity level will not appear on this page because it is not considered payable time. Time that has generated exception with a "Low" or "Medium" severity level will appear on this page and is considered payable time.

Viewing Details of Payable Time

Access the Payable Time Details page.

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Payable Time Detail page

This page displays the payable time details for each day, including the TRC for the time. The TRC either is entered by the employee when reporting time, or it is generated by the system when the Time Administration process is run. 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.

Start Date and **End Date** — Seven days of information is displayed by default. Various values for Start Date and End Date can be entered, but End Date cannot exceed Start Date by more than 31 days.

Payable Status Filter — Expand this grid to limit the display of payable time by payable time status.

Pending Exceptions — This button appears if exceptions were generated. Click to access the Manage Exceptions page.

Time Reporting Elements, Task Reporting Elements (tab) — These tabs display information related to Time Reporting Elements or Task Reporting Elements, if applicable. Time reporting elements are based on your Time Reporting Template information and the Task Reporting Elements are based on the Taskgroup that is reported.

Previous Job and **Next Job** — If you have multiple jobs, click to view a different job's summary of payable time.

See Also

Chapter 14, "Understanding Payable Time," Understanding Payable Time, page 387

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Viewing Forecasted Time

Access the Forecasted Time Summary page.



Forecasted Time Summary page

The Forecast Payable Time feature enables you to estimate what your payable time is for the current period or for a future time period. It looks at reported time and scheduled time, and calculates what the payable time would be for a specified time period using that information. By using the Forecast Payable Time feature, you can look at how many hours you have reported to date in the period, and what the remaining scheduled hours are. The Forecast Payable page shows you your estimated payable time.

There are four 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 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. To generate Payable Time, you must use the processes for creating Payable Time.

The View Forecasted Payable Time Summary page displays one week of payable time. The system allocates time based on the TRC, and displays the total quantity of hours for each TRC to which time was reported within the specified date range.

Start Date Seven days are displayed by default.

Detail Page Click this button to access the Forecasted Time Details page.

Note. The Forecasted Time Detail page is similar to the Payable Time Detail page.

Requesting Overtime

This section provides an overview of self-service overtime request transactions and discusses how to:

- View overtime requests.
- View details of an overtime request.

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- Enter overtime requests.

Understanding Overtime Transactions

With Time and Labor, employees can enter overtime requests for a future date and receive approval or denial notices. Managers can view overtime requests, check the amount of overtime that employees have worked to date, approve or deny overtime requests, and enter comments explaining their decisions.

Employees can use Time and Labor to:

- View the status of overtime requests that they've entered.
- View the details of an overtime request.
- Enter overtime requests for a future date.

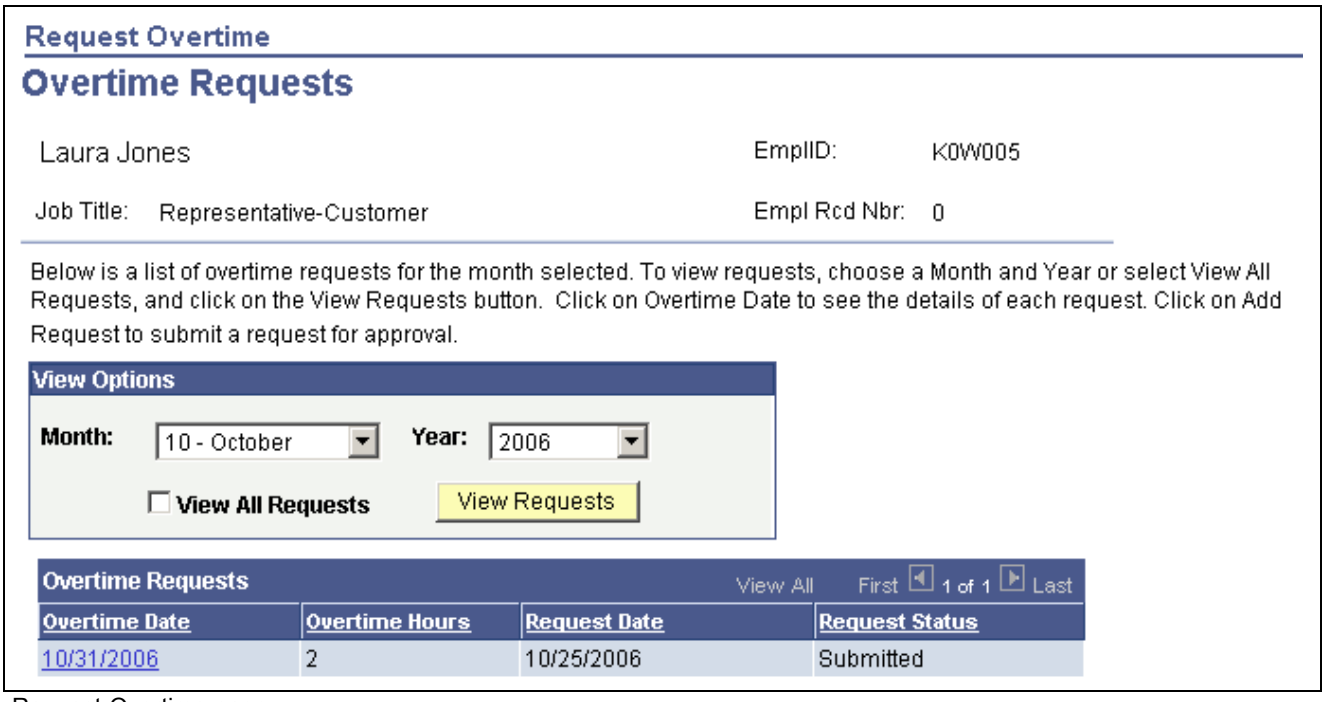
Pages Used to Enter, View, and Process Overtime Requests

Page Name	Object Name	Navigation	Usage
Select Job Title	CO_MULT_JOB_SRCH	Self Service, Time Reporting, Report Time, Overtime Requests	Select the job to which the overtime request applies. This page is only available when an employee has multiple jobs.
Overtime Requests	TL_OT_EVENTS	Self Service, Time Reporting, Report Time, Overtime Requests	Employees can view recent overtime requests and access the Overtime Request Details page, where they can enter new overtime requests.
Overtime Request Details (view)	TL_OT_RQST_DTL	Click an overtime date on the Overtime Requests page.	Employees can view the details associated with an overtime request.
Overtime Request Details (add)	TL_OT_RQST	Click Add Request on the Overtime Requests page.	Employees can enter new overtime requests.
Submit Confirmation	TL_OT_SUB_CONF	Click the Submit button on the Overtime Request Details page.	Confirms that an overtime request was submitted.

Viewing Overtime Requests

Access the Request Overtime page.

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Request Overtime page

Overtime Requests

When the page is first accessed, this group box lists up to three of the employee's most recent overtime requests and the status of each request: *Submitted, Approved,* or *Denied.*. If there are more than three requests and you want to see all of them, select the View All Requests check box and click View Requests.

- To view requests for a different month, select the month and year and click View Requests.
- To view the approval details for a request or see comments that were submitted with a request, click the on the date link in the Overtime Date column. The Overtime Request Details page is displayed.
- To add a request, click the Add Request button.

Viewing Details of an Overtime Request

Access the Overtime Request Details (view) page.

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Request Overtime – Overtime Request Details page

The Approval Details group box shows who entered the request and who must approve it.

Name Displays the name of the employee who entered the request and names of those who must approve the request.

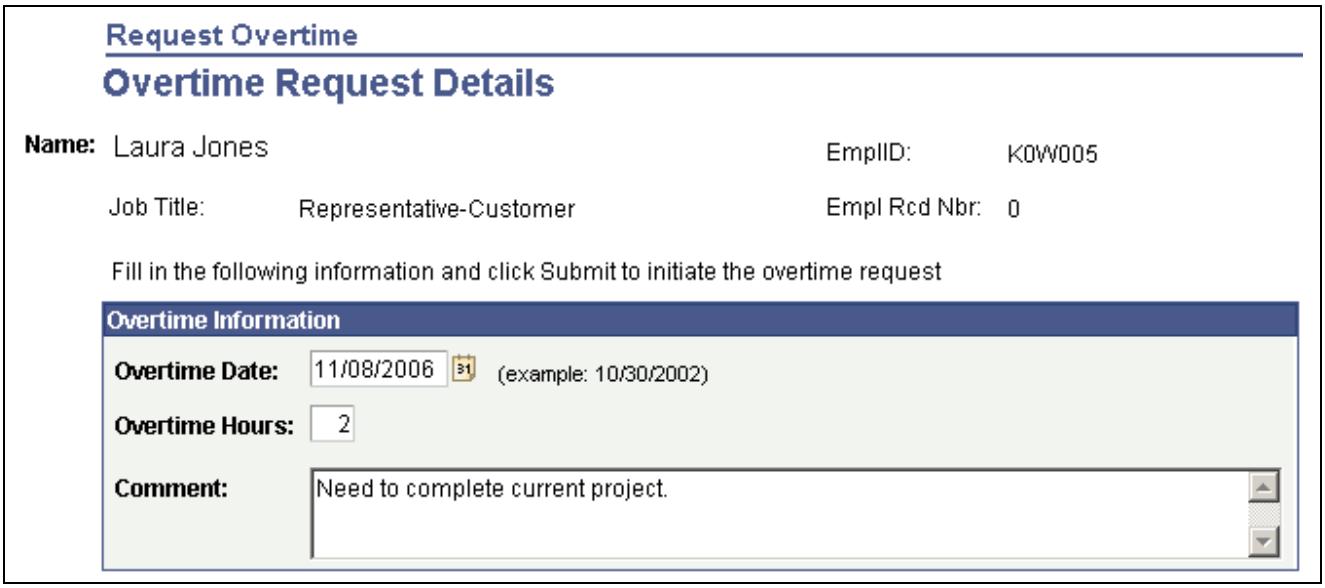
Workflow Action and **Transaction Date** The action completed by the person named to the left and the time the action occurred. Valid actions are *Submitted, Approved,* and *Denied.*

Comment Displays the comment entered by the employee and manager on the Overtime Request Details page.

Entering Overtime Requests

Access the Overtime Request Details (add) page.

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Request Overtime – Overtime Request Details (add) page

Overtime Date Enter today's date or a later date. One request can be submitted on any given day. To correct a request after submitting it, the manager must deny that request so that you can enter a new one.

Overtime Hours Enter up to 99 hours. Enter positive numbers only.

Comment Enter the reason for the request. Comments display on the manager's Overtime Request Details and approval pages.

Submit Click to submit the request for approval. A confirmation page shows who submitted the request, who must approve it, and your comments.

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CHAPTER 21

Using Manager Self-Service Components for Time Management and Reporting

This chapter provides an overview of manager self-service components for time management and reporting and discusses how to:

- Navigate in Time and Labor self-service pages for managers.
- Report time.
- Manage time.
- View time management calendars.
- Manage overtime requests.

Understanding Manager Self-Service Components

The manager self-service components enable managers to review, add, update, and delete (where appropriate) time and labor information *for their direct reports*.

Note. Managers cannot access their own information using the Manager Self Service component; they use the Employee Self-Service component to report and access their time.

See Chapter 20, "Using Self-Service Components," page 547.

Manager Self Service components include:

- Time and Labor Launch Pad for managers (TL_LPAD_MSS_PNLG).

  Enables managers to view their employee information regarding reported and scheduled time for a month at a time. It also enables them to navigate to other manager self-service transaction pages.

- Manage Schedules (SCH_MNG_PERIOD).

  Enables managers to adjust a time reporter's schedule.

  See Chapter 20, "Using Self-Service Components," Timesheet Display: Self-Service Versus Manager Self-Service, page 566.

- Assign Work Schedule (SCH_ASSIGN).

  Enables a manager to assign an employee's work schedule.

- Time Sheet (TL_MSS_EE_SRCH_PRD).

  Enables managers to report or adjust their employee's time and task details for a day, week, or time period for punch and elapsed time. It also allows managers to approve or deny an employee's time.

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- Approve Payable Time (TL_SRCH_APPRV_GRP).

  Enables a manager to approve an employee's payable time.

  See Chapter 17, "Managing Time," Approving Payable Time, page 474.

- Mass Time for managers (TL_MASS_TIME_ESS).

  Enables managers to report an employee's time in several ways. They can report time according to the employee's schedule for a specified date or date range. They can also specify a lump sum amount to be distributed according to the employee's schedule or specify multiple time transactions, to be applied to each day in the time period.

- Overtime Requests (TL_OT_HISTORY_LIST).

  Enables manages to view recent overtime requests and approve or deny them.

- Overtime Request Details (TL_OT_RQST_DTL).

  Enables managers to view the details for an overtime request and either approve or deny the request.

- Overtime Balances (TL_OT_BALANCES).

  Enables managers to view service dates, overtime balances for the current period and year-to-date, and overtime limits for a group of employees.

- Compensatory Time (TL_COMPTIME_PNL).

  Enables managers to view employee compensatory time balance and compensatory time expiration information.

  See Chapter 20, "Using Self-Service Components," Viewing Compensatory Time and Expiration, page 574.

- Exceptions (TL_MNG_EX_PNL_GRP3).

  Enables managers to view, allow, and clean up exceptions associated with their employee's reported time.

  See Chapter 17, "Managing Time," Managing Exceptions, page 480.

- Payable Time Summary (TL_TM_MPAY_SUMM_PG).

  Enables managers to view employee's payable time that has been calculated by the system from a schedule or reported time.

- Payable Time Detail (TL_MNG_PAY_VIEW_DT).

  Enables managers to view details about their employee's payable time.

- Forecasted Time Summary (TL_TM_SPAY_SUMM_PG).

  Enables managers to view a forecasted summary of their employee's 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 (TL_MNG_SPAY_VIEW_D).

  Enables managers to view details about their employee's forecasted payable time.

- Daily, Weekly or Monthly (Time) Calendar Views (TL_WV_DAILY_CAL, TL_WV_WEEKLY_CAL TL_WV_MONTHLY_CAL).

  Enables managers to compare reported time, payable time, and scheduled time for their employees.

- Manager Search Options (TL_MSS_SRCH_OPTION).

  Allows a manager to specify the default search criteria and display options that will appear for employee searches, used on the various manager pages.

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Employee Selection Criteria

The Employee Selection Criteria grid is a common component that appears on many of the self service pages that managers use in Time and Labor. This component is described in the Using Manager Self Service for Scheduling Components chapter.

See Chapter 22, "Using Manager Self-Service for Scheduling Components," Setting Up Manager Search Options, page 628.

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 the organization. This can include regular employees as well as contractors and other temporary assignment workers.

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 by using the User Profiles component (USERMAINT). 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.

For the Manager Self Service, Time Management pages that display a list of employees, the following determines which employees the manager has access to:

1. Determine the row security permission list that is assigned to your user ID on the User Profiles - General page.
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 the department ID and then investigating who you have access to in the department, as well as the departments that are set up as children nodes on the departmental security tree.
4. If you do use group security within Time and Labor, make sure the dynamic groups are refreshed to the date that you need, to have the most up-to-date inclusion of employees in the list.

For all pages that you use to access time reporter information in the Time and Labor system, we derive the view of time reporters based on the criteria above.

See Also

Chapter 17, "Managing Time," page 459

Enterprise PeopleTools PeopleBook: Security Administration

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Navigating in Time and Labor Self-Service Pages for Managers

There are several ways to access self-service transactions:

- The Time Management page (for managers).
- Standard menu path navigation.

Time Management Page

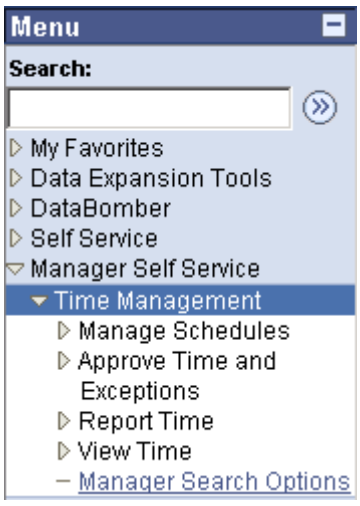
This page includes links to all Time and Labor self-service transactions that pertain to the manager. The user can also click a link to return to the Manager Self Service page.



Time Management page

Standard Menu Navigation

The standard menu-driven navigation is the traditional PeopleSoft access method.



Manager Self Service navigation

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Using Time and Labor Launch Pad Pages for Managers

This section discusses how to:

- Specify employee information.
- View employee time.
- Set up application suites.

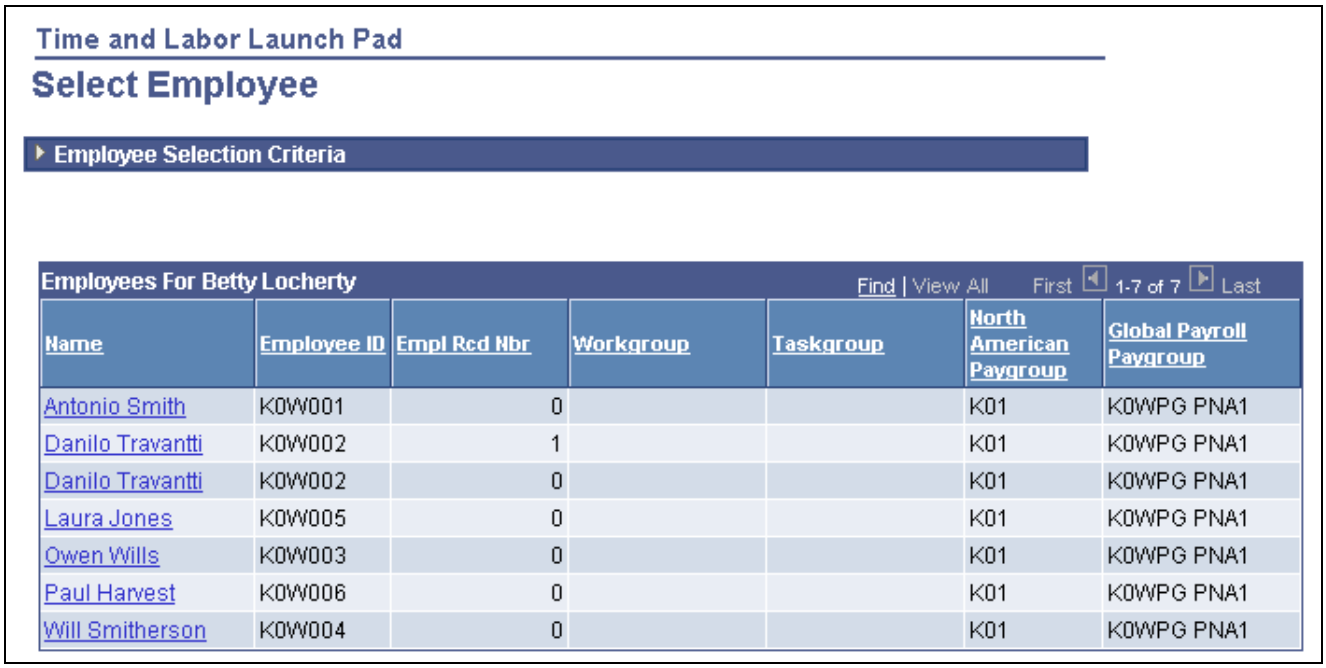
Pages Used to Specify Time and Labor Launch Pad Information for Managers

Page Name	Object Name	Navigation	Usage
Time and Labor Launch Pad	TL_LAUNCH_PAD	Click the employee name link on the Time and Labor Launch Pad - Select Employee page.	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. You can also click a link to review, by day, the details of the reported, payable, forecasted time, exceptions and recommended actions for the employee.
Application Items	TL_APP_ITEM_PNL	Set Up HRMS, Product Related, Time and Labor, Launch Pad Navigation Suites, Application Items	Specify the items that are available within an application suite.
Application Suites	TL_APP_SUITE_PNL	Set Up HRMS, Product Related, Time and Labor, Launch Pad Navigation Suites, Application Suites	Set up the application items that are available to both managers and time reporters using the Go field on the Time and Labor Launch Pad page.

Specifying Employee Information

Access the Time and Labor Launch Pad - Select Employee page.

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Time and Labor Launch Pad

Select Employee

Employee Selection Criteria

Employees For Betty Locherty — Find | View All — First 1-7 of 7 Last

Name	Employee ID	Empl Rcd Nbr	Workgroup	Taskgroup	North American Paygroup	Global Payroll Paygroup
Antonio Smith	K0W001	0			K01	K0WPG PNA1
Danilo Travantti	K0W002	1			K01	K0WPG PNA1
Danilo Travantti	K0W002	0			K01	K0WPG PNA1
Laura Jones	K0W005	0			K01	K0WPG PNA1
Owen Wills	K0W003	0			K01	K0WPG PNA1
Paul Harvest	K0W006	0			K01	K0WPG PNA1
Will Smitherson	K0W004	0			K01	K0WPG PNA1

Time and Labor Launch Pad – Select Employee page

Enter values in the Employee Selection Criteria grid and click the Get Employees button to return a list of employees.

See Chapter 22, “Using Manager Self-Service for Scheduling Components,” Setting Up Manager Search Options, page 628.

Viewing Employee Time

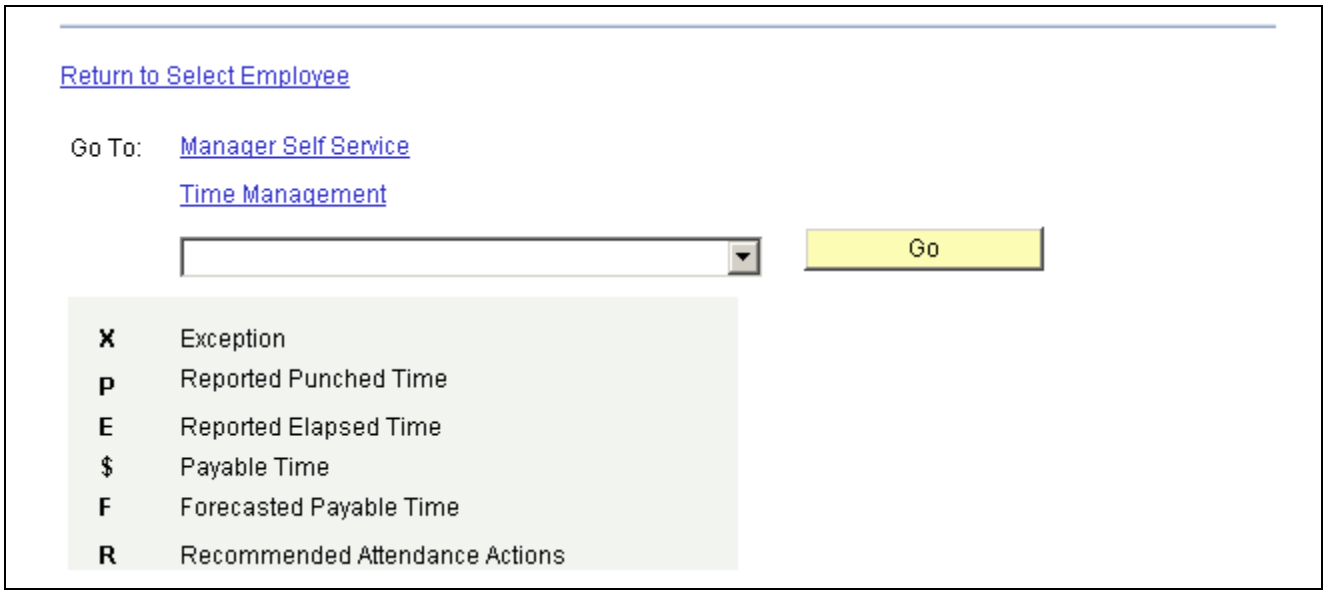
Access the Time and Labor Launch Pad page by clicking an employee name link.

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Time and Labor Launch Pad page (1 of 2)

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Time and Labor Launch Pad page (2 of 2)

When you first enter the Launch Pad page, the current month and year are displayed by default.

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 eight hours that day.

At any given time, any day in the calendar may display the following values: *X, P, E, $, F,* or *R.*These values indicate that there is information about reported time for that day. For example, suppose *E* appears for one day on the calendar. This means that the employee has elapsed time reported for that day. If *$* 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, exceptions or recommended attendance actions associated with that day. Click 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 forecasts what the payable time would be for those days and displays an *F* on the day. The forecasted time is not actually payable time, but an estimate of what the payable time would look like. 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 the link for the day that you want to view.

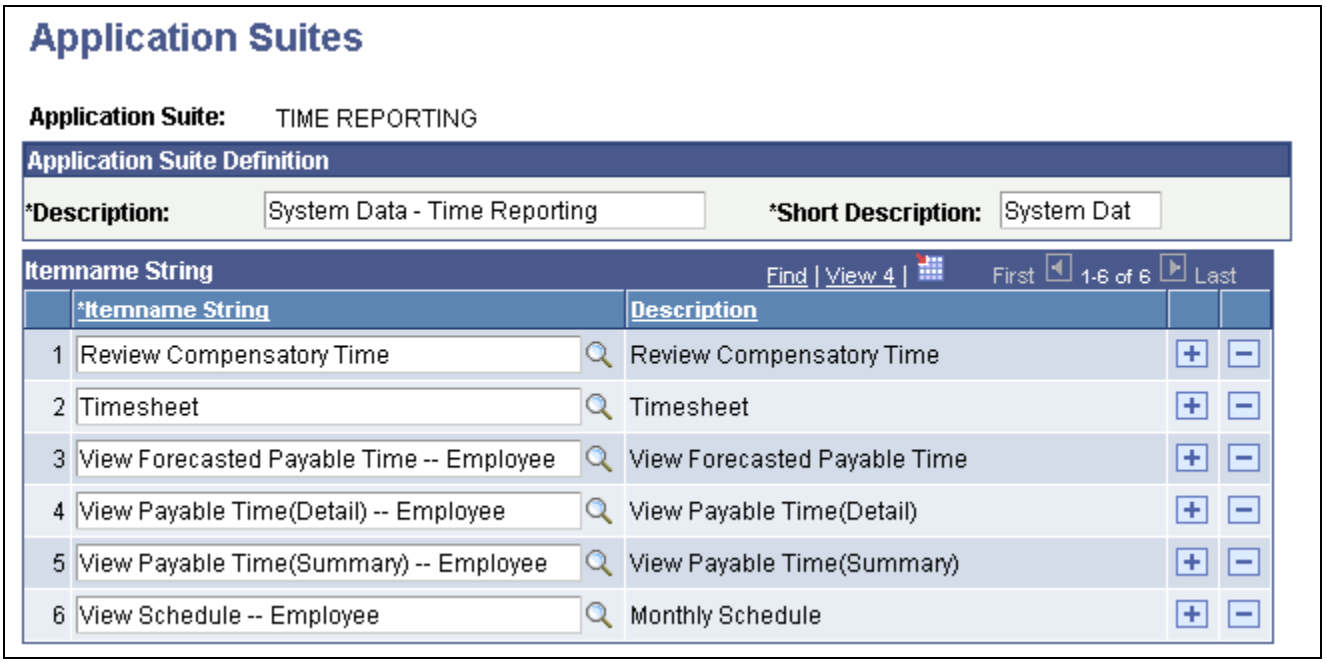
Previous Month and **Next Month** Use these buttons to skip to the preceding or next month.

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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 Suites page.



Application Suites 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 on 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.

See Also

Chapter 17, “Managing Time,” Adjusting Time, page 487

Application Items for Managers

Eighteen application items are available to managers through the Time Management application suite:

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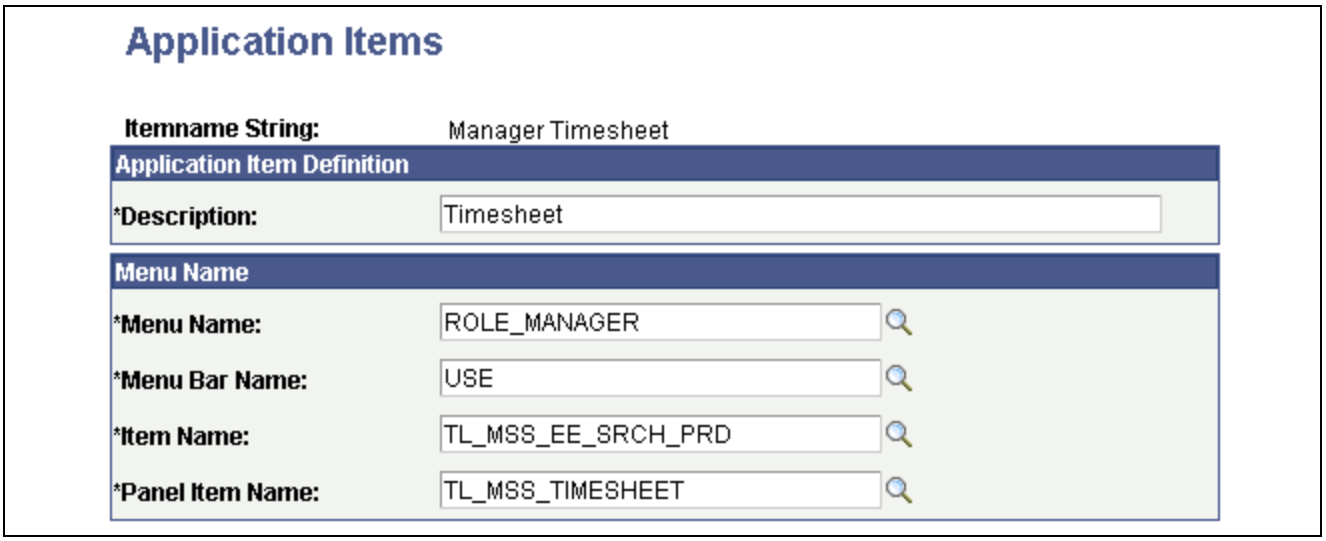
Application Items Descriptions

Itemname String	Description
Adjust Paid Time	Select to make record-only adjustments to employee time that was already paid or closed. The changes that you make aren't processed through payroll again, but are for record keeping purposes only.
Approve Absence Requests	Select to approve the employee's absence requests.
Approve Overtime Requests	Select to approve employee requests to work overtime.
Approve Payable Time	Select to approve the employee's time for payroll.
Approve Training	Select to approve training for employees.
Manage Exceptions	Select to view and allow an employee's exceptions.
Manage Schedules - Manager	Select to override an employee's schedule.
Manager Timesheet	Select to view, report, change, or approve an employee's reported time.
Review Compensatory Time	Select to view an employee's compensatory time.
Review Scheduled Assignments	Select to review an employee's scheduled assignments.
Timesheet	Select for an employee to view, report, or change their reported time.
View Forecasted Payable Time - Employee	Select for an employee to view their forecasted payable time.
View Forecasted Payable Time − Manager	Select to view, report, or change the employee's forecasted payable time.
View Payable Time (Detail) - Employee	Select for an employee to view their payable time details.
View Payable Time (Detail) - Manager	Select to view, report, or change an employee's payable time details.
View Payable Time (Summary) - Employee	Select for an employee to view a summary of their payable time.
View Payable Time (Summary) - Manager	Select to view, report, or change a summary of an employee's payable time details.
View Schedule - Employee	Select for an employee to view their monthly schedule.

Working with Application Items

Access the Application Items page.

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Application Items page

Save Click the Save button for the application items to appear in the Go function's drop-down list box on the Time and Labor Launch Pad page.

Reporting Time

This section lists common elements and discusses how to:

- Assess employees' time at a summary level.
- Enter, view, or change employee's time.
- Use mass time.
- Select employees for mass time.

Common Elements Used in this Section

Time Reporting Elements and **Task Reporting Elements**

The self-service pages that *employees* use to report time include fields for selecting time reporting and task reporting elements. The employee's time reporting and task reporting templates determine which fields are displayed. If data is reported in error for invalid time or task elements (through a TCD, Mass Time, or Rapid Time Reporting pages, for example), those time reporting or task fields are also displayed so that employees can make corrections.

The self-service pages that *managers* use to report an employee's time include fields for all time reporting elements, regardless of the employee's time reporting template. The task fields vary, depending on the employee's time reporting template: if the Task Profile option is selected on the template, the self-service pages display a task profile field; if the Task Template option is selected on the template, the self-service pages display the task fields for the task template assigned to the employee's taskgroup. If data is reported in error for invalid time task elements (through a TCD, Mass Time Reporting, or Rapid Time Reporting pages, for example), those fields are displayed on the self-service pages so that managers can make corrections.

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Timesheet page Both punch time and elapsed time are reported using the Timesheet navigation component. When selected through the Manager Self Service component, the Report Time - Select Employee page displays a list of the manager's employees. By clicking the employee name link, the manager can select the employee for whom to report time. The Timesheet page that appears is based on the Time Reporter Type value selected on the Create or Maintain Time Reporter Data pages, which determine whether punch or elapsed information is displayed.

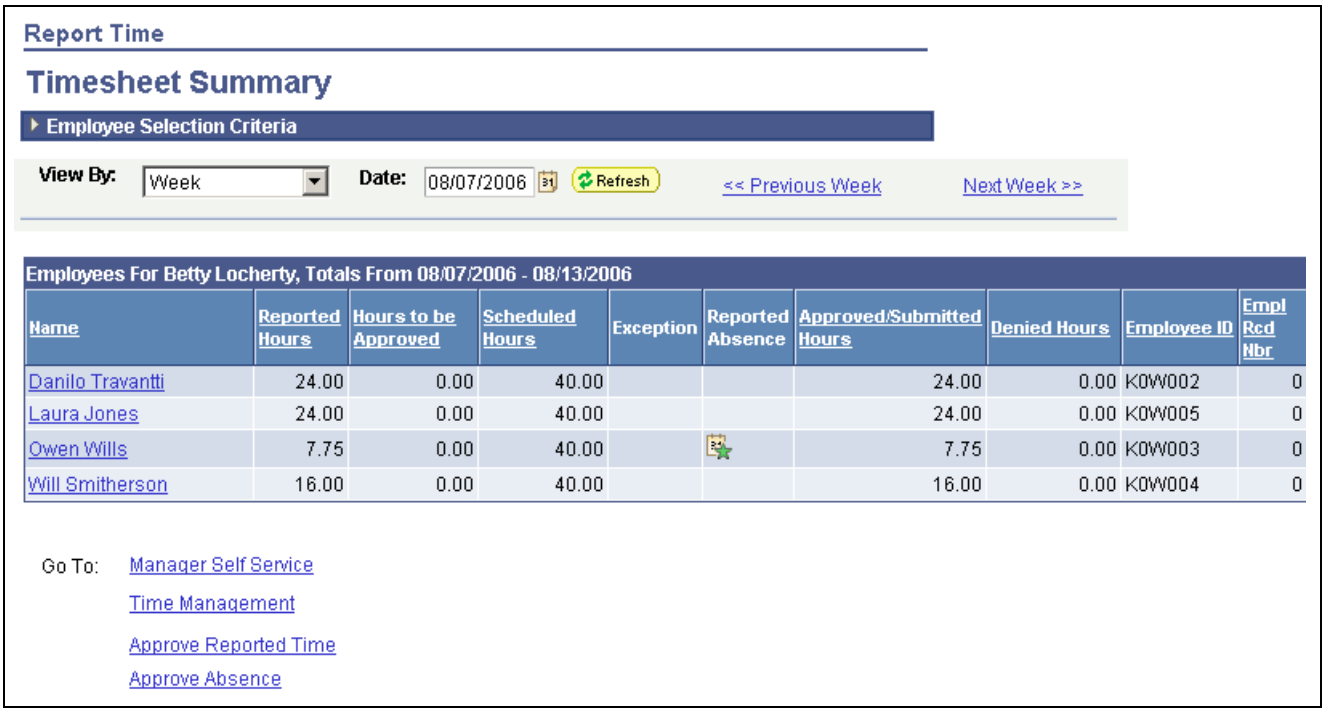
Pages Used to Report Time

Page Name	Object Name	Navigation	Usage
Report Time — Timesheet Summary	TL_MSS_TIMESHEET	Manager Self Service, Time Management, Report Time, Timesheet, Report Time – Timesheet Summary	You can view all employees' time whether they need approval or not. **Note.** To approve an employee's time, you need to either display the employee's timesheet or navigate using the Approve Reported Time link.
Timesheet	TL_RPTD_PCH, and , TL_RPTD_ELP	Click the employee name link on the Report Time – Timesheet Summary page.	Report time and task details for a day, week, or time period for either punch or elapsed time reporters.
Mass Time Reporting - Select Time Reporters	TL_MASS_WHO	Manager Self Service, Time Management, Record Time, Mass Time, Mass Time Reporting - Select Time Reporters	Managers select employees for mass time reporting.

Assessing Employees' Time at a Summary Level

Access the Report Time — Timesheet Summary page.

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Report Time—Timesheet Summary

The Report Time—Timesheet Summary page is the initial interface for managers to approve or deny time for their employees. This page provides managers with the following functionality:

- Summary information about their employee's reported hours, based on the date range specified.
- Summary totals for each employee indicating hours needing approval, total reported hours, total scheduled hours, hours that have already been approved, and hours that have been denied.
- Summary totals of time reported to TRC Categories defined by the customer.
- Details of time that has been submitted by the employee versus time that is still in a saved, not submitted, status.
- Access to approve or deny time for an individual or group of employees.
- Access an employee's timesheet where a manager can view or edit details about the time reported.
- Ability to scroll from one day or week to the next to review if there are employees needing time approved.
- Ability to filter on employees with exceptions.
- Employee details such as Job Description, Department, Workgroup, or other fields specified on the manager search options page.
- Ability to navigate quickly to and from the Report Time – Timesheet Summary page.
- An icon is displayed in the Reported Absence column if absence data exists for an employee within the date range that you specify on the Timesheet Summary page.

  Managers cannot approve absence events using the Approve Reported Time Summary page. Managers must access the employee's detailed timesheet to approve an absence event.

See Chapter 17, "Managing Time," Approving Reported Time, page 462.

The Report Time – Timesheet Summary page includes these fields:

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Employee Selection Criteria

An expandable/collapsible group box used to select a group or individual employee for approval. This group box also includes the Get Employees button. The fields displayed here are a result of the Include In Criteria selected on the Manager Search Options. If the Manager Search Options are blank, then the default display is derived from the 'Manager Search Defaults' on the Time and Labor Installation page.

See Chapter 22, "Using Manager Self-Service for Scheduling Components," Setting Up Manager Search Options, page 628.

View By

This field determines how much reported time you see in the summary list. The page refreshes each time you select an option. The options are: Day, Week, All Time Before to or All Time After.

Day: Select to display any reported time with a status of *Needs Approval* or *Denied* for the day specified.

Week: (The default). Select to display any reported time with a status of *Needs Approval* or *Denied* for the week specified. This field looks at what the user has specified on their User Preferences for the *Start Day of the Week* field. If the user has specified *Monday* as their start day of week, then the results list begins each week with a *Monday* date. For example, if the user enters a date of 03/01/04 (Tuesday) in the Date field and clicks on the refresh button, the system displays a date range of 02/28/04 (Monday) through 03/06/04 (Sunday).

Date

The default is today's date when you first access this page. If the View By option is *Week*, the system will check the User Preferences for the "Start Day of Week" specified and display the week accordingly If the View By option is *All Time Before* or *All Time After* , the system looks at the date that has been entered and returns a list of employees who have time needing approval prior to or in the future of that date.

Refresh button

Select to refresh the page and employee list after the user changes a date.

Grid Title Bar

This group box title includes manager's name and the date range being viewed.

Grid columns

The columns: Select, Name, Reported Hours, Hours To Be Approved, Scheduled Hours, Exception, Approve/Submitted Hours and Denied Hours are static. All of these columns will be displayed when using the view by *Day* or *Week* options.

Users can configure up to three TRC Category columns to be displayed along with Employee Selection Criteria fields that are selected as *Include in List*.

They include:

Select – Check this box to select a time reporter for approval or denial.

Name – Click on the individual time reporter's link to be taken to the timesheet.

Reported Hours – Displays the total number of hours reported.

Hours To Be Approved – Total hours needing approval.

Scheduled Hours – Displays the total number of scheduled hours.

Exception – Displays an icon indicating that an exception(s) exist.

Approve/Submitted Hours – Displays the total number of approved or submitted hours.

Denied Hours – Displays the total number of denied hours.

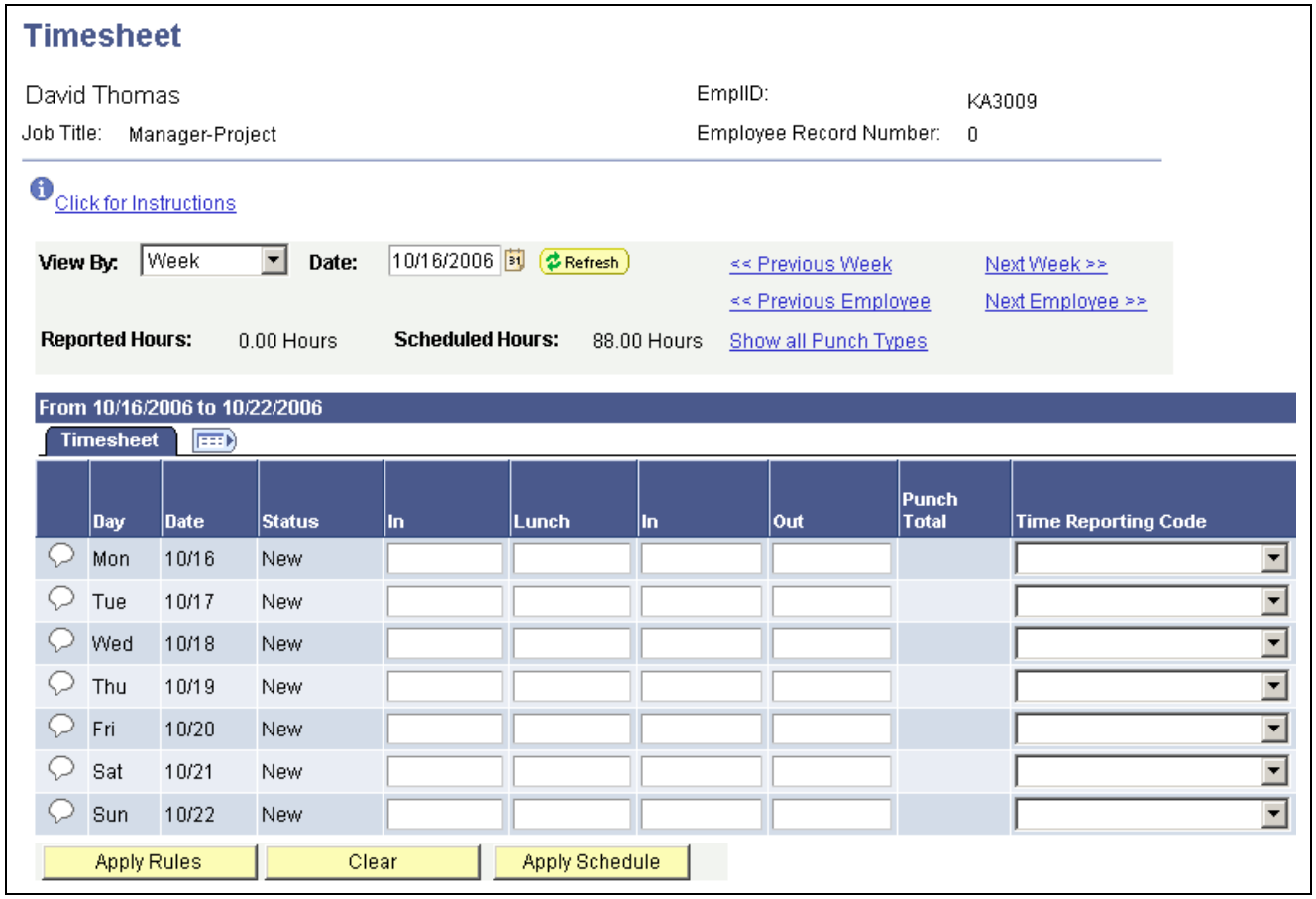
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See Also

Chapter 17, "Managing Time," Approving Reported Time, page 461

Entering, Viewing, or Changing Employee's Time

Access the Timesheet page.



Timesheet page

Apply Rules Click this button to launch an online process that immediately applies rules to the reported time. If the rules are applied successfully, this Payable Time Detail page is displayed and the payable time status is set to *Submitted*. If exceptions are created, the Exceptions page is displayed.

Note. This button is displayed if the Run On-line Rules check box is selected on the TL Installation page during implementation.

Clear Click this button to remove entries from the gird that have not been saved or submitted.

Apply Schedule Click this button to populate the grid for the selected View by period of time based on the time reporter's schedule.

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Note. Clicking this button only populates, based on the time reporter's schedule, the week, day or period that is displayed that does *not* already have entries that have been submitted or saved.

See Also

Chapter 20, "Using Self-Service Components," Timesheet Display: Self-Service Versus Manager Self-Service, page 566

Using Mass Time

The Mass Time Reporting feature enables a manager to report time in several different ways for their employees 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.

Managers use Mass Time Reporting to save time and keystrokes when reporting time. It enables the manager to easily report time using an employee's schedule, or to report different attributes of time for a period rather than having to enter them in manually for each day in the specified period.

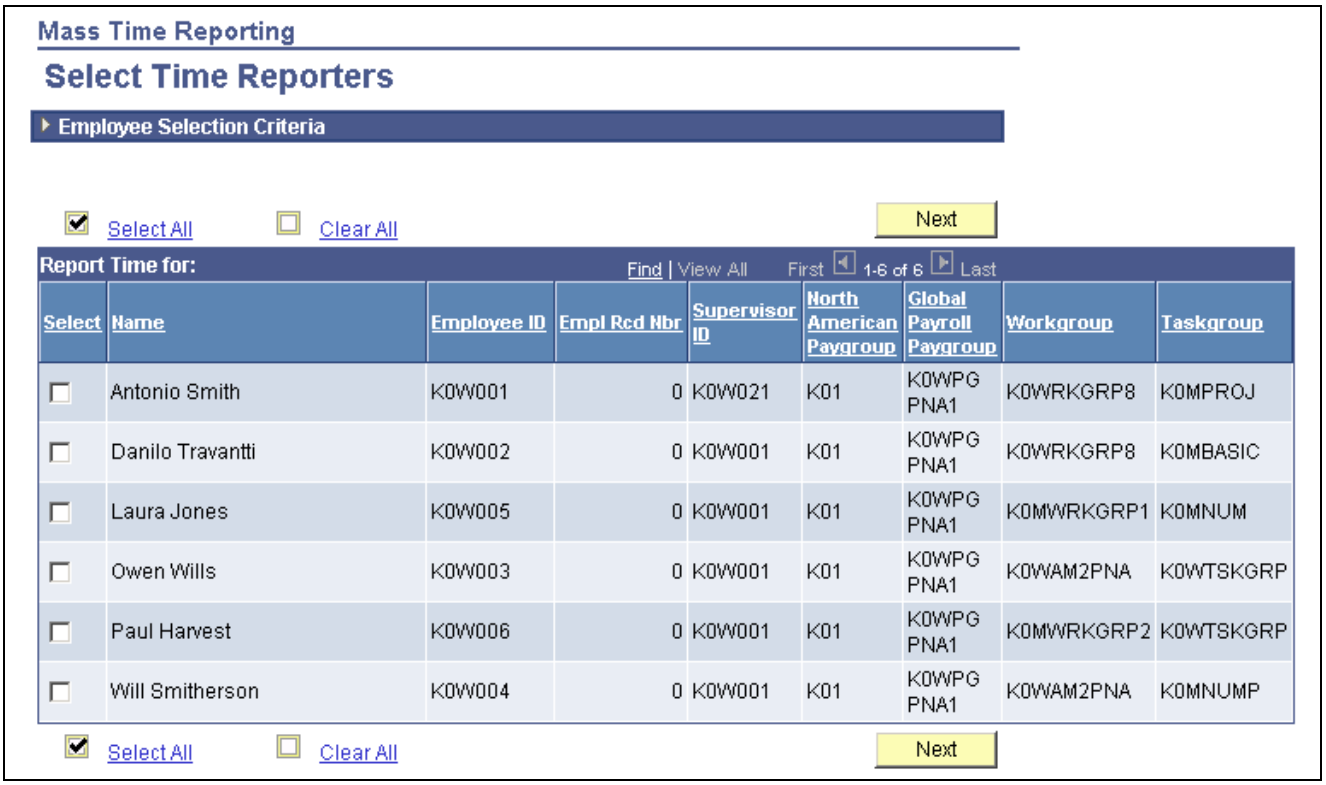
Note. To use Mass Time Reporting, the time reporter must be assigned to a schedule.

Selecting Employees for Mass Time

Access the Mass Time Reporting - Select Time Reporters page.

See Chapter 20, "Using Self-Service Components," Using Mass Time, page 569.

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Mass Time Reporting

Select Time Reporters

Employee Selection Criteria

Select All Clear All Next

Report Time for: Find | View All First 1-6 of 6 Last

Select	Name	Employee ID	Empl Rcd Nbr	Supervisor ID	North American Paygroup	Global Payroll Paygroup	Workgroup	Taskgroup
☐	Antonio Smith	K0W001	0	K0W021	K01	K0WPG PNA1	K0WRKGRP8	K0MPROJ
☐	Danilo Travantti	K0W002	0	K0W001	K01	K0WPG PNA1	K0WRKGRP8	K0MBASIC
☐	Laura Jones	K0W005	0	K0W001	K01	K0WPG PNA1	K0MWRKGRP1	K0MNUM
☐	Owen Wills	K0W003	0	K0W001	K01	K0WPG PNA1	K0WAM2PNA	K0WTSKGRP
☐	Paul Harvest	K0W006	0	K0W001	K01	K0WPG PNA1	K0MWRKGRP2	K0WTSKGRP
☐	Will Smitherson	K0W004	0	K0W001	K01	K0WPG PNA1	K0WAM2PNA	K0MNUMP

Select All Clear All Next

Mass Time Reporting – Select Time Reporters

Managers can use this page to report time for an employee or a group of employees using Time and Labor's Group Security. 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.

See Chapter 20, "Using Self-Service Components," Using Mass Time, page 569.

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 After selecting which employees you want to report time for, click this button to go to the next segment of the page, the Mass Time Reporting - Select Time Reporting Method page, when you finish selecting the employees.

Information on the Mass Time Reporting pages is included in the Using Self-Service Components chapter.

See Also

Chapter 20, "Using Self-Service Components," Using Mass Time, page 569

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Managing Time

This section discusses how to:

- View a summary of payable time.
- View details of payable time.
- View a summary of forecasted payable time.
- View details of forecasted payable time.
- View employee accumulators.

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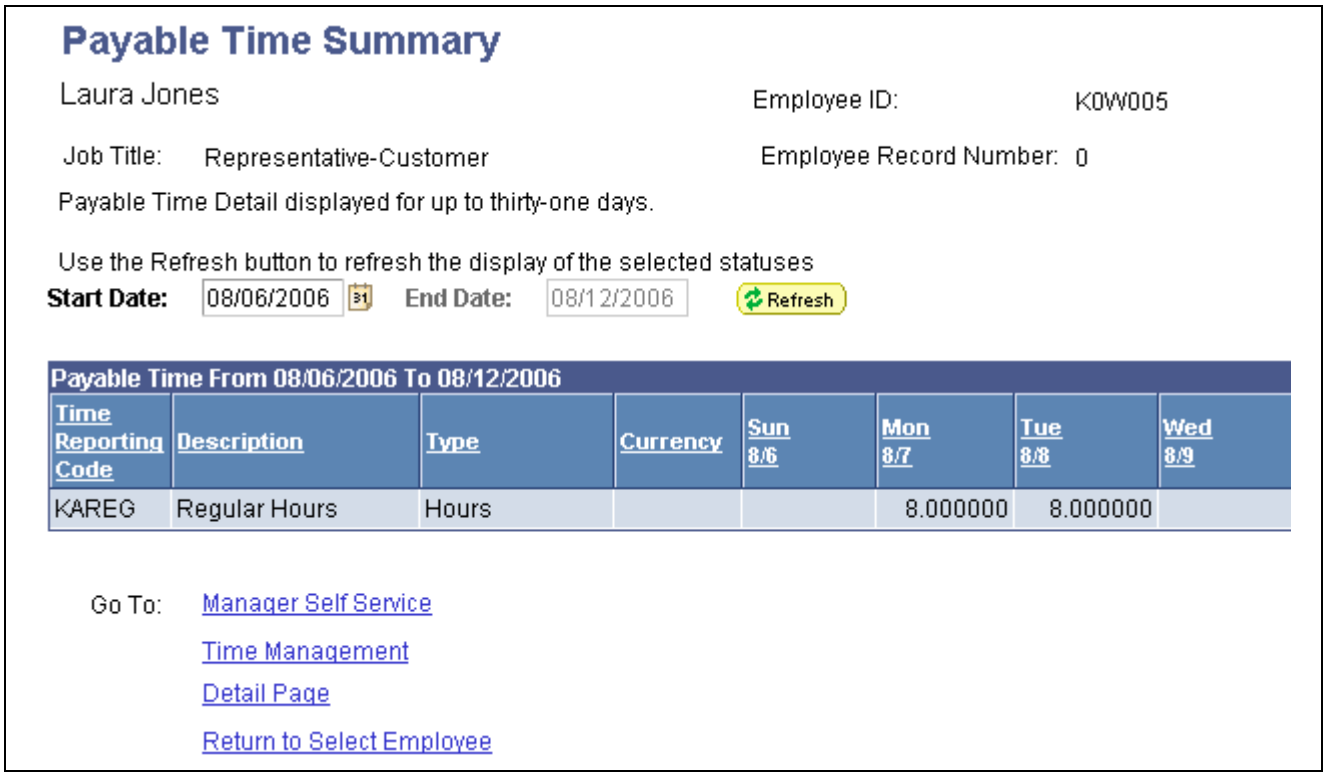
Pages Used to Manage Time

Page Name	Object Name	Navigation	Usage
Payable Time Summary	TL_TM_MPAY_SUMM	Manager Self Service, Time Management, View Time, Payable Time Summary, Payable Time Summary. Enter employee selection criteria and click the employee name link.	View an employee's week-by-week summary of payable time by time reporting code using this display-only page.
Payable Time Detail	TL_MNG_PAY_DET_VW	Manager Self Service, Time Management, View Time, Payable Time Detail, Payable Time Detail	View the details of and employee's 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 and medium severity exceptions enable the system to create payable time; however, high severity exceptions do not.
Forecasted Time Summary	TL_TMSPAY_SUMM	Manager Self Service, Time Management, View Time, Forecasted Time Summary, Forecasted Time Summary. Click the employee name link.	View the week-by-week summary of an employee's forecasted payable time by time reporting code using this display-only page.
Forecasted Time Detail	TL_MNG_SPAY_DET_PN	Manager Self Service, Time Management, View Time, Forecasted Time Detail, Forecasted Time Detail. Click the employee name link.	View an employee's forecasted payable time details.
Compensatory Time	TL_COMPTIME_PNL	Manager Self Service, Time Management, View Time, Compensatory Time	View compensatory time balance and expiration information.
Accumulators	TL_ALL_ACCUMULATOR	Manager Self Service, Time Management, View Time, Accumulators, Accumulators	View time reporter accumulator totals by TRC.

Viewing a Summary of Payable Time

Access the Payable Time Summary page.

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Payable Time Summary page

The Payable Time Summary page displays one week's payable time. The time is allocated by date, then by TRC, and then by task. For example, suppose an employee's task profile specifies that time should be allocated 50 percent to one task and 50 percent to another, then you would see two rows for the same date and TRC. You can view the details of how the time is allocated on the Payable Time Details page.

Payable Status Filter Expand this grid to filter the display by payable time status.

Start Date Seven days of information is displayed by default.

Pending Exceptions This button appears if exceptions were generated. Click to access the Manage Exceptions page.

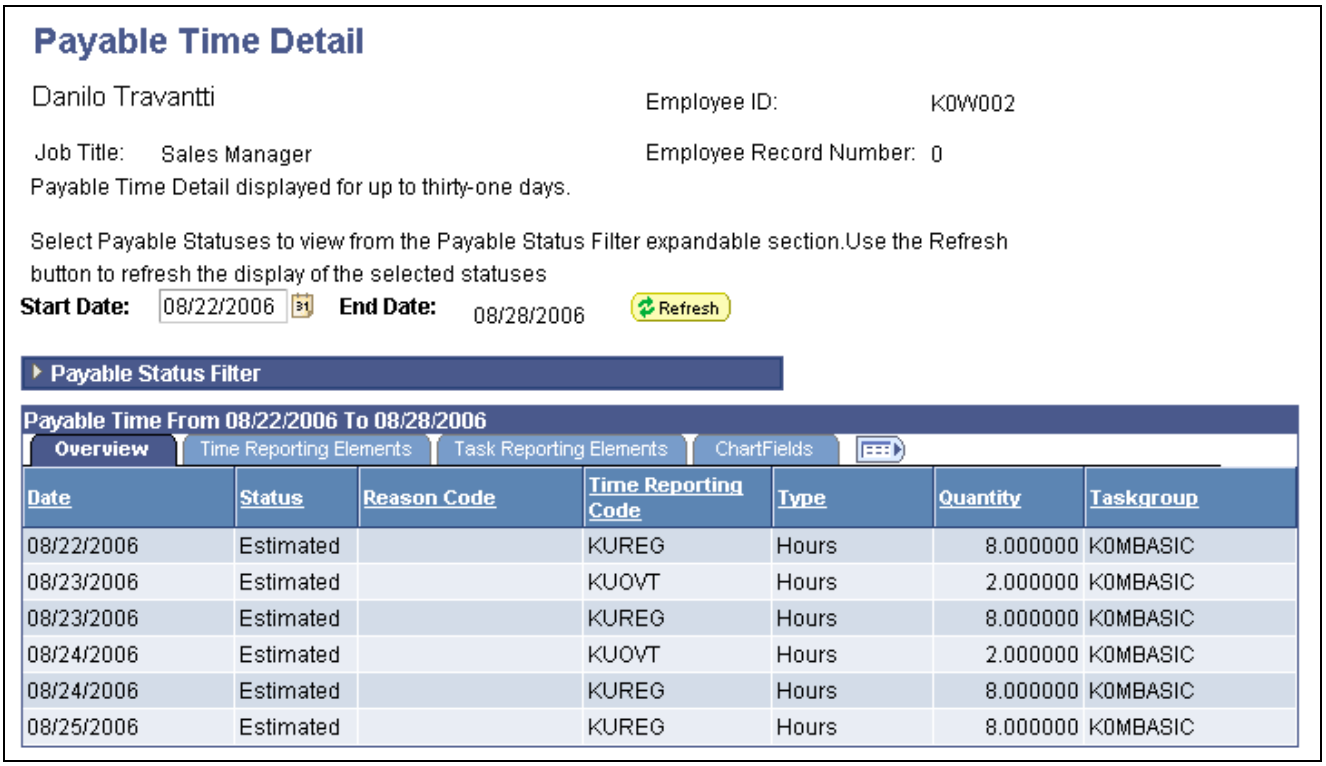
Detail Page Click to access the Payable Time Details page.

Note. Time that has High severity level exceptions associated with it doesn't appear on this page because it is not considered payable time. Time that has Low or Medium severity level exceptions associated with it will create payable time and display on this page.

Viewing Details of Payable Time

Access the Payable Time Detail page.

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Payable Time Detail

Danilo Travantti Employee ID: K0W002

Job Title: Sales Manager Employee Record Number: 0

Payable Time Detail displayed for up to thirty-one days.

Select Payable Statuses to view from the Payable Status Filter expandable section.Use the Refresh button to refresh the display of the selected statuses

Start Date: 08/22/2006 End Date: 08/28/2006 Refresh

Payable Status Filter

Payable Time From 08/22/2006 To 08/28/2006

Overview | Time Reporting Elements | Task Reporting Elements | ChartFields

Date	Status	Reason Code	Time Reporting Code	Type	Quantity	Taskgroup
08/22/2006	Estimated		KUREG	Hours	8.000000	K0MBASIC
08/23/2006	Estimated		KUOVT	Hours	2.000000	K0MBASIC
08/23/2006	Estimated		KUREG	Hours	8.000000	K0MBASIC
08/24/2006	Estimated		KUOVT	Hours	2.000000	K0MBASIC
08/24/2006	Estimated		KUREG	Hours	8.000000	K0MBASIC
08/25/2006	Estimated		KUREG	Hours	8.000000	K0MBASIC

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.

Start Dateand **End Date** Seven days of information is displayed by default. .

Pending Exceptions This button appears if exceptions were generated. Click to access the Manage Exceptions page.

Previous Employee and **Next Employee** Click to view a different employee's summary of payable time.

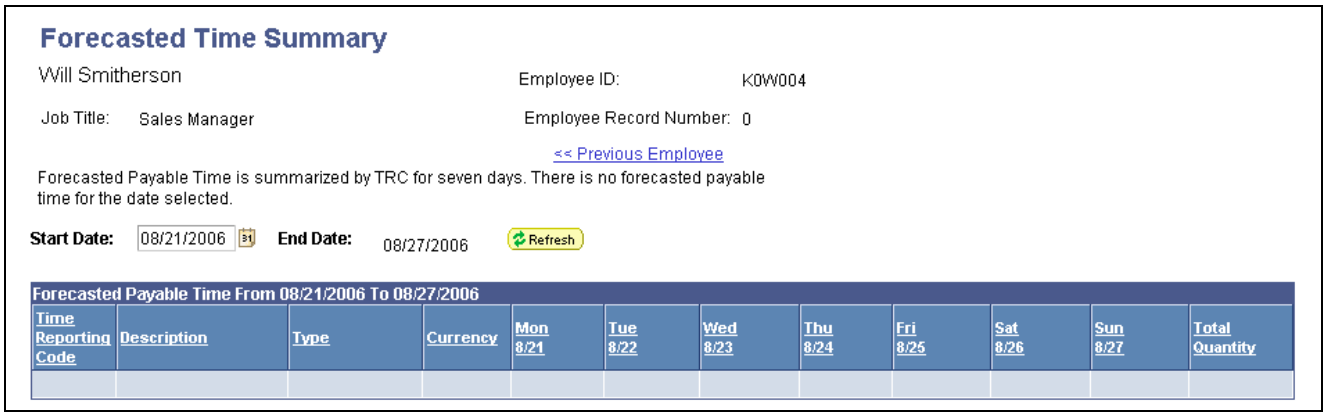
Time Reporting Elements Select this tab to view more payable time information.

Task Reporting Elements Select this tab to view more payable time information.

Viewing Forecasted Payable Time

Access the Forecasted Time Summary page.

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Forecasted Time Summary page

The Forecast Payable Time feature enables you to estimate what your payable time is either for the current period or for some time period in the future. It uses reported time, scheduled time, or both to calculate what the payable time is for a specified time period. For example, if you are a manager in a retail store where schedules change constantly, you are probably concerned about the number of employees who work overtime. You may want to estimate payable time for the current period and review which employees are approaching overtime limits. By using the Forecast Payable Time feature, the system looks 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 shows you what their estimated payable time will be and, from there, you will know if any of your employees are approaching overtime.

Payable time is forecasted in two ways:

- Forecast time for a month or for a specific date using the Time and Labor Launch Pad.
- Forecast time for a period using the Time Administration Run Control.

Note. Forecasted Payable Time is not actual Payable Time. To generate Payable Time, you must use the normal processes for creating payable time.

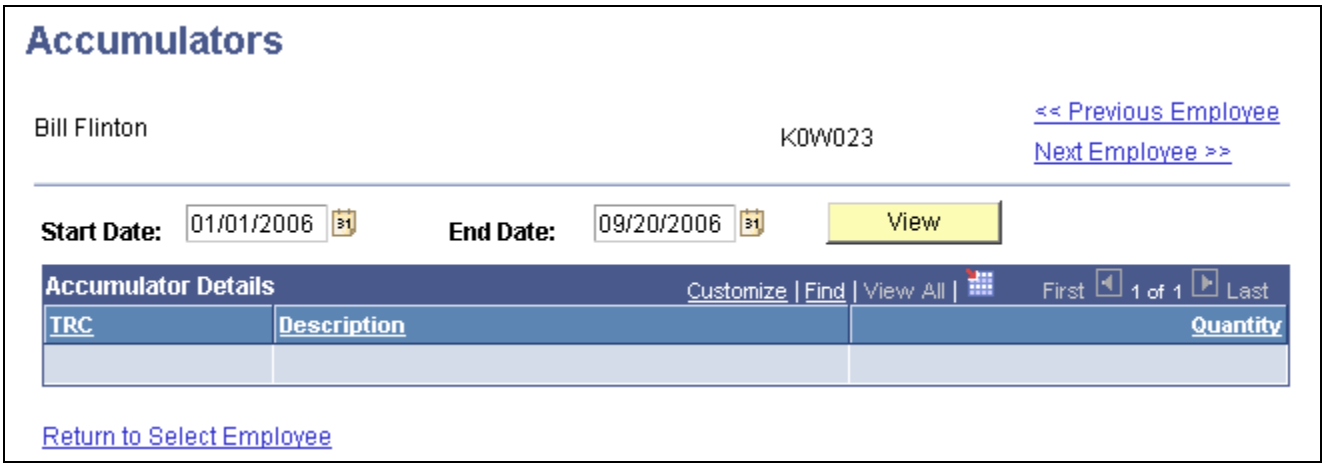
The Forecasted Time Summary page displays one week's estimated payable time. The system allocates time based on the TRC, and displays the total quantity of hours for each TRC to which time was reported or generated by the rules process within the date range specified.

Detail Page Click this link to access the Forecasted Time Details page.

Viewing Accumulators

Access the Accumulators page.

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Accumulators page

If you enter a range of dates in this page per employee, you will see per accumulator TRC, what the accumulated total (QTY) is associated to that TRC as of that date range. The accumulators will keep getting added to, they are not decreased from or restarted. The accumulator totals per employee are stored in TL_IPT1_CNT table.

Using Manager Time Calendar Views

This section provides an overview of Time Calendar views, common elements used with time calendar pages and discusses how to:

- Select time calendar view criteria
- View daily, weekly and monthly time calendars.

Understanding Manager Time Calendars

Time and Labor time calendar views provide assistance to optimally manage workforce resources by offering up-to-the-minute information on time reporter groups and time related events. This information can include which time reporters are scheduled, those present, those available, and other information such as training and absences. This information is viewable on a daily, weekly or monthly time calendar and includes drill down capability to view lower level details.

Time and Labor time calendar views enable managers to properly determine current resource allocation and adjust resources for maximum productivity and profitability. Managers can respond quickly to changing scheduling needs and time reporter requests. Managers can also view prior periods to assess past scheduling effectiveness and resource allocation.

Each time calendar page consists of a set of instructions, a viewing options menu to select the type of information to view on the time calendar, the time calendar grid itself that displays time reporter information and a legend that details the colors and codes used in the time calendar display.

The daily time calendar view page enables managers to view daily time information broken down by the hour. This time information can include those time reporters currently present, those scheduled later in the day and those who are scheduled off or have not yet arrived. Since managers can also view current overtime allowances, immediate decisions can be made addressing the overtime concerns for an individual time reporter or a group of time reporters.

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The weekly and monthly time calendar view pages enable managers to analyze recorded time data and plan future schedules. Using prior period time calendar views, managers can view time reporters' overtime hours, completed training, and absence history. Managers can use this information to review time reporters' approaching overtime limits for example, allowing managers to respond to scheduling needs and take immediate action to avoid excessive overtime. Viewing future periods on the time calendar view pages enable managers to preview scheduled training and absences and make adjustments to schedules as necessary.

Note. The absence display functionality requires the installation of PeopleSoft Absence Management. The training display functionality requires the installation of PeopleSoft Human Resources (Administer Training business process) or Learning Management and implementation of the Administer Training .

Note. Each manager calendar view page contains several sections of information. While the actual time calendar section changes based on the daily, weekly or monthly selection made, the rest of the page remains largely the same, providing general information for interpreting the calendar page.

While you can select to view different groups of time reporters in the View Criteria section of the Time Calendar page, the system defaults to the time reporters assigned to the manager signed on to the page.

Viewing Time Calendars

The time calendar view design presents a grid with each time reporter listed, by name, on the left side of the page. To the right of the Time Reporter column is the Job Title column, showing each time reporter's job title. The Exceptions and No Show columns display only when there is exception or "no show" information to display for a time reporter. The No Show column displays only on the daily calendar.

For elapsed time reporters the Elapsed column displays the time rather than the time slots. When more than one time event has occurred for the selected time period (more than one TRC reported) the hours of all of these events are totaled and displayed using the color/symbol for the event with the highest priority. Only reported hours are used in the calculation of total hours for the period.

For training and absence, the system displays requested and approved hours when no hours are reported. These hours are *not* included in the Sum column.

For holidays, if hours are not reported but are scheduled, the system displays the quantity of scheduled hours; otherwise, the grid displays reported hours. These hours also do not calculate in the Sum column unless the hours were reported to a TRC that is associated with a TRC List defined on the Options page.

Common Elements Used in This Section

Time Reporter This display-only field shows each employee with reported time for the selected period.

Job Title This display-only field shows the job title for each time reporter with reported time for the selected period.

Exceptions If exceptions have been generated during the Time Administration process for a time reporter for the time period, a link to the Manage Time Exceptions page (TL_MNG_EXCEPT_PNL3) will appear in this column.

If there are no exceptions for a time reporter this column is not displayed.

See Chapter 17, "Managing Time," Managing Exceptions, page 480.

No Show Indicates a time reporter failed to show up for a scheduled shift on the current day. This appears only on the daily calendar.

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Elapsed For elapsed time reporters, the Elapsed column displays reported hours rather than displaying hours in the time slots. Where more than one time event has occurred for the selected time period the hours of all events are totaled and displayed using the color/symbol for the event with the highest priority.

Sum The Sum column displays the summary of total punched time and elapsed time on the time reporter row. If the Show Schedule option is selected, the Sum column displays the total number of scheduled hours in the schedule row for the viewing period.

Note. The Sum column displays the summary *inclusive* of the End Time hour in the daily time calendar being displayed. If the selected time calendar display period is between 8 am and 2 p.m., the Sum column calculates *through* the End Time hour selected, calculating through 2:59 p.m. Change the time range for the calendar display to assure all time reported appears in the Sum column.

Daily Calendar, Weekly Calendar and **Monthly Calendar** Each calendar viewing page contains links to the other two views. Use these links to access a different calendar viewing period.

Go to: The Go to: drop-down menu provides navigation links to these time management pages: Adjust Paid Time, Approve Absence Requests (if PeopleSoft Absence Management is installed), Approve Overtime Requests, Approve Payable Time, Assign Work Schedule, Manage Exceptions, Manage Schedules, Timesheet, View Forecasted Payable Time, View Payable Time (Detail).

Pages Used to View Manager Time Calendars

Page Name	Object Name	Navigation	Usage
View Criteria	TL_WV_CRITERIA_SBP	Manager Self-Service, Time Management, View Time, Daily, Weekly or Monthly Time Calendar	Select the criteria to view on the current calendar page. The system retains the Group ID and Show Symbols selections and defaults to these each time you access the page. The system also carries these selections to the next calendar view you access using the Navigational Links. The daily calendar also retains the Start Time and End Time selections.

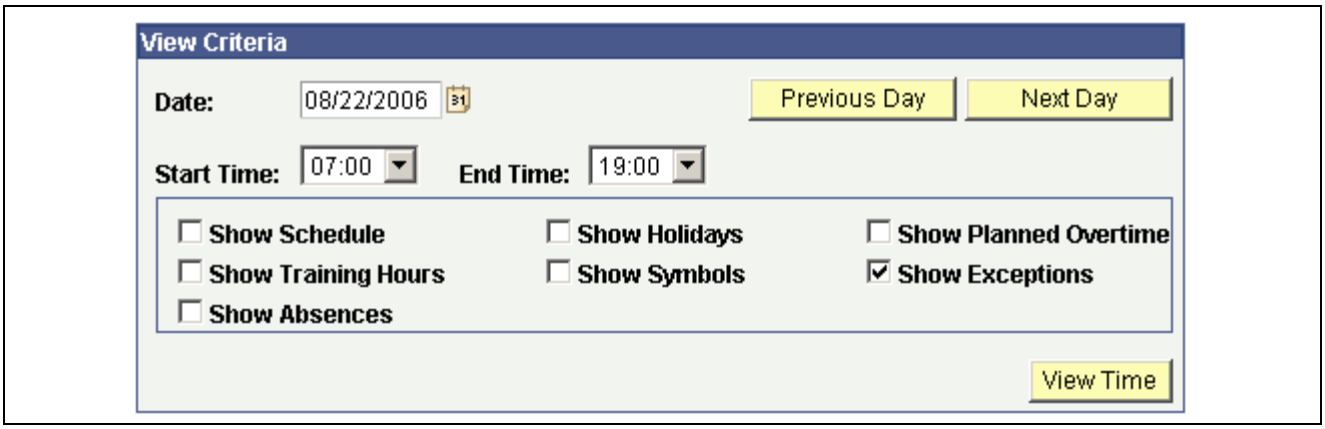
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Page Name	Object Name	Navigation	Usage
Legend	TL_WV_LEGEND_SBP	Manager Self-Service, Time Management, View Time, Daily, Weekly or Monthly Time Calendar	Use the legend, displayed at the bottom of each of the calendar pages, to interpret the calendar color codes, and symbols if you select *Show Symbols* as part of the view criteria. What appears in the legend depends on the viewing options defined in the calendar view setup and the options selected for viewing the current calendar. Only colors/symbols defined on the set up page and selected to display time data on the current calendar view appear here.
Daily Time Calendar	TL_WV_DAILY	Manager Self-Service, Time Management, View Time, Daily Time Calendar, Daily Time Calendar	Use the Daily Time Calendar page to view detailed information regarding time reporters' daily time related data for a specific date. The page defaults to the current date.
Weekly Time Calendar	TL_WV_WEEKLY	Manager Self-Service, Time Management, View Time, Weekly Time Calendar, Weekly Time Calendar	Use the Weekly Time Calendar page to view detailed information regarding time reporters' weekly time related data for a specific week. The page defaults to the current week period.
Monthly Time Calendar	TL_WV_WEEKLY	Manager Self-Service, Time Management, View Time, Monthly Time Calendar, Monthly Time Calendar	Use the Monthly Time Calendar page to view detailed information regarding time reporters' monthly time related data for a specific month. The page defaults to the current month period.

Selecting Time Calendar View Criteria

Access the Daily, Weekly, or Monthly Time Calendar – View Criteria group box.

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View Criteria group box

Each of the calendar viewing pages enables you to select the types of information you choose to view. The viewing options must first be defined on the Calendar View Options page. The available viewing options display above the calendar. This flexible design enables you to adjust the criteria so that you view exactly the information you need. By selecting the check box next to the option you want to add to the view, you can build a multi-layered view of the schedule.

Note. Though absence, overtime and training information can be selected to display on all calendar views, the type of information displayed depends on the period being viewed and implementation of PeopleSoft Absence Management (for absences) and PeopleSoft Human Resources Administer Training or PeopleSoft Learning Management for training data. Time and Labor uses the Scheduled Time Fullsync and Scheduled Time Sync application messages to pull training data from ELM to the HCM database. For more detailed information on these selections, see the page description for the specific view.

Previous Day, Previous Week, Previous Month, Next Day, Next Week and **Next Month**

Navigate forward and backward keeping the same view criteria and time period selection.

Show Schedule

Selecting this option adds a row beneath each time reporter row in the calendar grid. For each time reporter, the top row displays only reported or payable time and the bottom row displays the scheduled time as either “Workday” or “Offday.” The Sum column displays the total number of scheduled hours for the time reporter. Before using this option the schedules must be created, built and assigned to time reporters.

Show Holidays

Select to display the holiday schedule of each time reporter.

To derive Holiday data, first the system determines if there is a Holiday Schedule on the JOB record for the employee. If there is no Holiday Schedule on the Job record, then the system will check for a Holiday Schedule in the following order:

1. If the employee is enrolled in the Global Payroll system, derive the Holiday Schedule from the Global Payroll pay group.
2. If the employee is enrolled in the Payroll for North America system or Payroll Interface, and the selected Absence System is *Absence Management*, derive the Holiday Schedule from Global Payroll pay group.

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3. If the employee is enrolled in the Payroll for North America system or Payroll Interface, and the selected Absence System is *Other*, derive the Holiday Schedule from the Payroll for North America pay group.
4. If there is no Holiday Schedule on the pay group, derive the Holiday Schedule from the Time and Labor Workgroup.

Holidays display on the time row, not the schedule row. If time is reported on a holiday, the system displays the time event with the highest priority so, if "Holiday" is higher, the color and symbol for holiday displays.

If the holiday is also a regular workday but no time is reported, the system displays the scheduled time in the reported slot with the color and symbol for holiday. Only reported hours calculate in the Sum column in this case.

Show Symbols Select to display the designated time event symbols as defined on the Calendar View Options page.

Note. Defining symbols is optional. If symbols have not been defined in the setup, Show Symbols will not be an option.

Show Exceptions When selected, an Exceptions column is added in the grid and displays an Exceptions link for any time reporter with exceptions during the Time Administration Process. Clicking this link takes you to the Exceptions Information page which provides more details about the exception and enables you to manage these exceptions.

The Exceptions column appears only if there are exceptions to show.

See Chapter 17, "Managing Time," Managing Exceptions, page 483.

Show Absences This option either displays absences reported in Absence Management or displays reported absences in Time and Labor for Base Benefit users, who are reporting leave time.

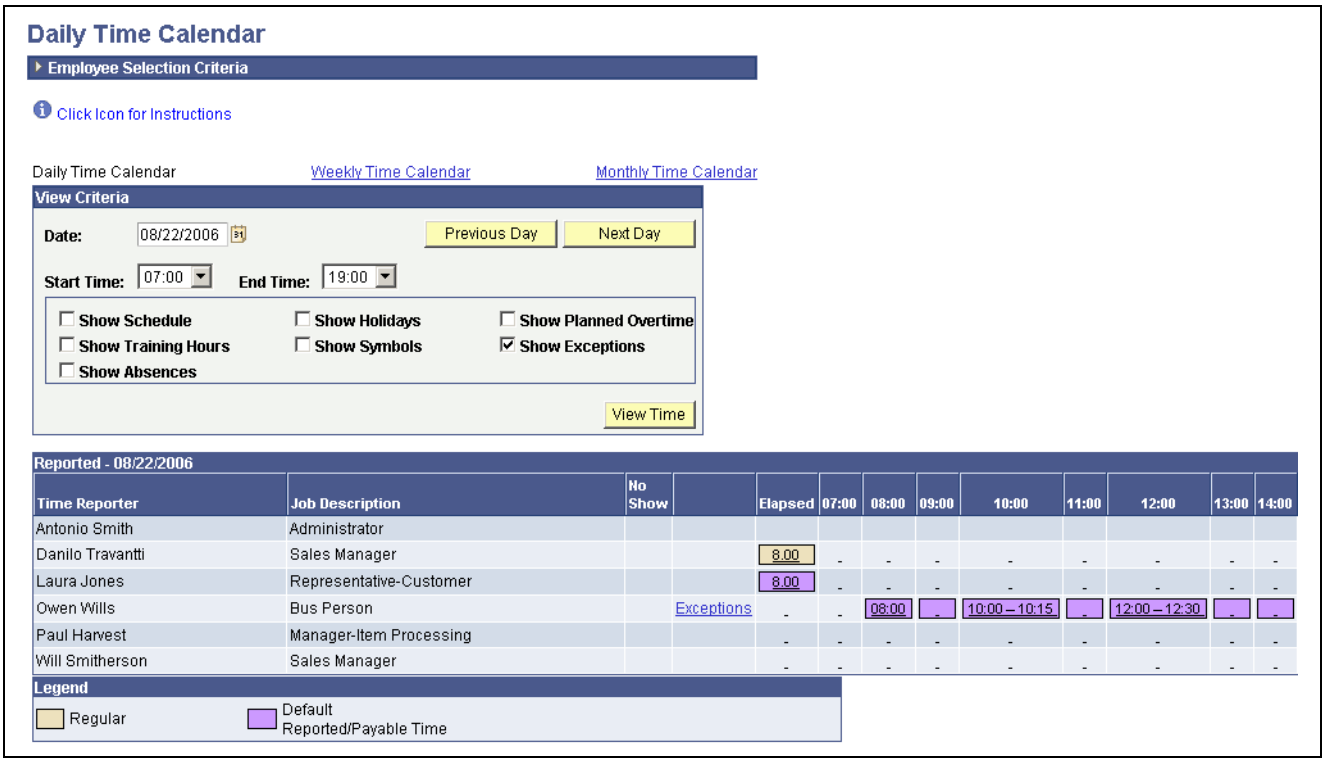
Show Training Hours This option works with Human Resources Administer Training and Learning Management to display requested , approved, and reported training time.

View Day, View Week, and **View Month** Click to apply the selected viewing options to the current page. The system stores the Group ID and Start Time, End Time and Show Symbols viewing criteria so that the next time this page is accessed with the same User ID, the same options will appear. Each time the options are changed click the View Time button to refresh the calendar view.

Viewing Daily Time Calendars

Access the Daily Time Calendar page.

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Daily Time Calendar page

This page provides an overview of a manager's time reporters' work time on a specified day. When accessing the page, all time reporters for the manager are listed and reported time for the current day (00:00 – 23:00) is displayed.

The Sum column displays the total time recorded for each time reporter for the selected viewing period. For punch time reporters, the sum represents the time between each in and out punch. If no out punch exists, the lesser of either current time or the selected period end time is used as the out time for the calculation.

On the daily calendar for example, if a time reporter records an in punch at 1:00 p.m. and the selected calendar view range runs from 8:00 am to 4:00 p.m., the sum would report four hours for this time reporter. For elapsed time reporters, the Sum column will display reported hours that are associated to TRCs that were found in the TRC List(s) designated on the View Options page.

On the daily calendars, punch time reporters recorded punch times display in the applicable time slot using the color/symbol for the Default Reported/Payable Time. If a symbol is specified for the time event, the punch time is preceded by the symbol and a dash. If a subsequent punch time event occurs within the same time slot, the time of this next event is appended with a dash separating the times. For time slots where no actual punches occur that are subsequent to a time-in punch and prior to a time-out punch, the color/symbol alone is displayed. For a time where a scheduled event such as training also occurs (the Show Training option must be selected) the color/symbol with the highest priority displays in the time slot.

Previous Day and **Next Day** Navigate forward and backward keeping the same view criteria and time period selection.

Start Time and **End Time** Select the range of time you choose to view for the daily calendar. The time calendar displays the time data for the specified range incrementing in one-hour slots. Time displays in military time only. These fields do not appear on the weekly or monthly calendar views. The times you set will remain the default times when accessing the daily calendar view pages.

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Show Planned Overtime Select to display requested and approved overtime.

If reported time overlaps with requested or approved overtime time, the reported time appears in the hour grid and the Elapsed time column reflects the additional overtime amount.

Show Training Hours Select to display the requested and approved training hours.

If training hours have been requested or approved for a time reporter, the grid displays the hours requested or approved will display, depending on the priority settings.

Only reported hours calculate in the Sum column. Hours displayed but not reported (requested, approved, scheduled) are not included in the Sum calculation.

Show Absences Select to display requested and approved absences as well as "no show" information. If a time reporter is scheduled to work but has not punched in and the scheduled start time has elapsed, then "no show" appears in a separate No Show column.

If reported time overlaps with requested or approved absence time, the reported time appears in the hour grid and the Elapsed time column reflects the additional absence time.

If "Half" or "All" days were selected for an absence without hours being specified, the system uses the scheduled hours to determine how many hours to display if a schedule exists.

If no schedule exists or if the day is an "Off" day, the system uses a default number of hours defined on the Calendar View Options Setup page.

Viewing Weekly and Monthly Time Calendars

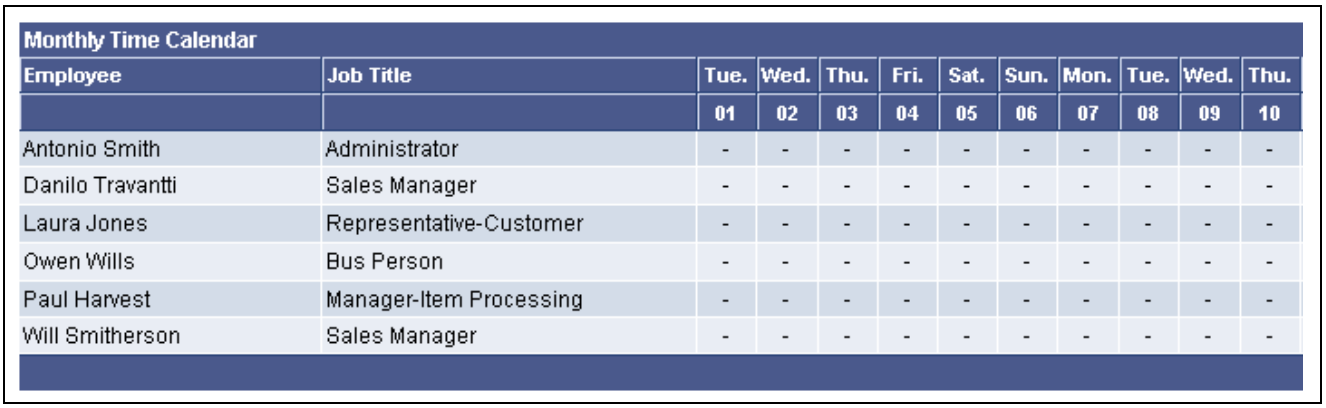
Access the Weekly or Monthly Time Calendar page.

Weekly Time Calendar

Employee	Job Title	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Sum	Employee
		08/21/2006	08/22/2006	08/23/2006	08/24/2006	08/25/2006	08/26/2006	08/27/2006		
Antonio Smith	Administrator	-	-	-	-	-	-	-	-	Antonio Smith
Danilo Travantti	Sales Manager	-	08.00	10.00	10.00	08.00	-	-	36.00	Danilo Travantti
Laura Jones	Representative-Customer	-	08.00	08.00	08.00	08.00	-	-	32.00	Laura Jones
Owen Wills	Bus Person	-	08.00	08.00	08.00	08.00	-	-	32.00	Owen Wills
Paul Harvest	Manager-Item Processing	-	-	-	-	-	-	-	-	Paul Harvest
Will Smitherson	Sales Manager	-	-	-	-	-	-	-	-	Will Smitherson

Weekly Time Calendar page

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Monthly Time Calendar

Employee	Job Title	Tue.	Wed.	Thu.	Fri.	Sat.	Sun.	Mon.	Tue.	Wed.	Thu.
		01	02	03	04	05	06	07	08	09	10
Antonio Smith	Administrator	-	-	-	-	-	-	-	-	-	-
Danilo Travantti	Sales Manager	-	-	-	-	-	-	-	-	-	-
Laura Jones	Representative-Customer	-	-	-	-	-	-	-	-	-	-
Owen Wills	Bus Person	-	-	-	-	-	-	-	-	-	-
Paul Harvest	Manager-Item Processing	-	-	-	-	-	-	-	-	-	-
Will Smitherson	Sales Manager	-	-	-	-	-	-	-	-	-	-

Monthly Time Calendar page

The Weekly and Monthly Time Calendar pages provide managers with an overview of their time reporters' reported time and other time related data for a specific week or month.

If reported or payable time exists for a time reporter, the hours quantity displayed in the cell is associated to that reported or payable time. The time displays as a link in the cell. If multiple TRCs are reported by a time reporter for a specific date, the reported or payable hours appear for that date with the color and symbol for the TRC with the highest priority appearing as the link. Click this link to view details on the reported or payable time.

If no reported or payable time exists but another time event item does, the quantity and symbol (if Show Symbolsis selected) of the next highest priority item will the cell displays.

The Sum column displays the total time for the selected viewing period. For punch time reporters, the sum represents the time between each in and out punch.

If no out punch exists, the system uses the end of the day (24:00); if no in punch exists, the system uses the beginning of the day (00:00).

Previous Week and **Next Week, Previous Month** and **Next Month**

Navigate forward and backward keeping the same view criteria and time period selection.

Reported Hours / Payable Hours

Use these options to select either reported or payable hours for viewing. These options appear only on the weekly and monthly time calendar views.

Show Planned Overtime

Select to display requested and approved overtime.

Show Training Hours

Select to display the requested and approved training hours.

If training hours have been requested or approved for a time reporter, the hours requested or approved will display, depending on the priority settings.

Only reported hours calculate in the Sum column. Hours displayed but not reported (requested, approved, scheduled) will not be included in the Sum calculation.

Show Absences

Select to display requested and approved absences.

If "Half" or "All" days were selected for an absence without hours being specified, the system uses the scheduled hours to determine how many hours to display if a schedule exists.

If no schedule exists or if the day is an "Off" day, the system uses a default number of hours defined on the Calendar Options Setup page.

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See Also

Chapter 4, “Setting Up Basic Tables,” Setting Up Manager Time Calendar View Options, page 61

Chapter 17, “Managing Time,” Managing Exceptions, page 480

Chapter 17, “Managing Time,” page 459

Chapter 20, “Using Self-Service Components,” page 547

Managing Overtime Requests

This section provides an overview of self-service overtime request transactions and discusses how to:

- View employee overtime requests.
- View the details of an overtime request.
- View overtime balances and limits (managers).
- Approve and deny multiple overtime requests.
- Approve single overtime requests.

Note. To take full advantage of this feature, it is recommended that you keep payable time up to date in order to populate Actual and Projected Overtime Hours. Also, ensure that you have time periods for the overtime limits built out as far in the future as you expect overtime to be requested.

Understanding Overtime Request Transactions

With Time and Labor, employees can enter overtime requests for a future date through a Web browser page and receive approval or denial notices. Managers can view overtime requests through the Web, quickly check the amount of overtime that employees have worked to date, and approve or deny requests, entering comments that explain why.

Managers can approve or deny overtime requests through the Approve Overtime Requests page or the Overtime Request Details page.

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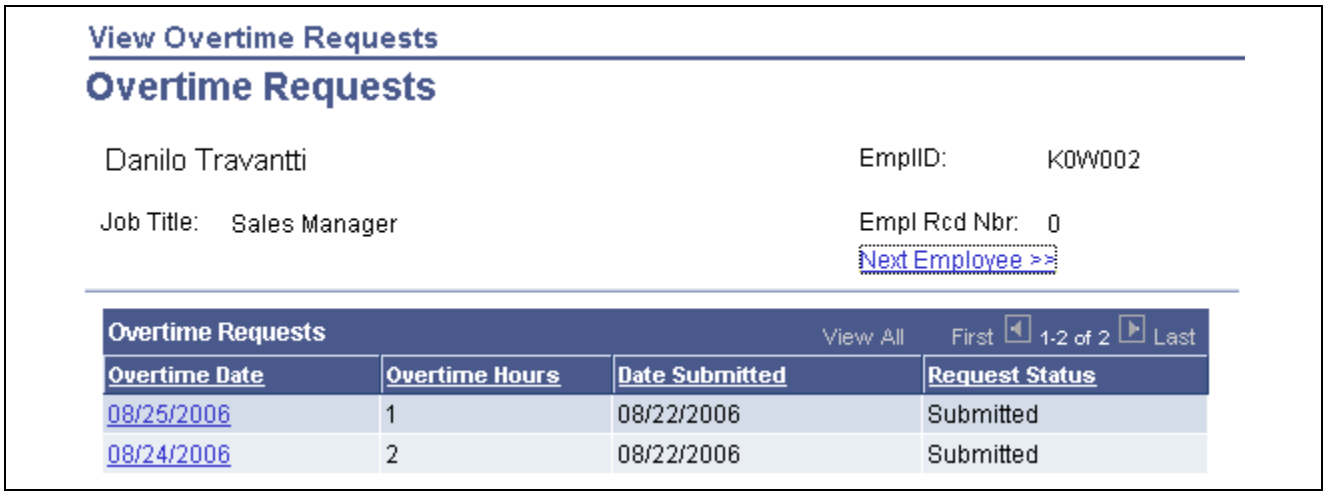
Pages Used to Manage Overtime Requests

Page Name	Object Name	Navigation	Usage
View Overtime Requests - Overtime Requests	TL_OT_EVENTS	Manager Self Service, Time Management, View Time, Overtime Requests, View Overtime Requests Click the employee name link.	View an employee's overtime requests.
Overtime Request Details	TL_OT_RQST_DTL	Click an overtime date on the View Overtime Requests page.	View the details of an employee's overtime request.
View Overtime Balances	TL_OT_BALANCES	Manager Self Service, Time Management, View Time, Overtime Balances, View Overtime Balances	View service dates, overtime balances for the current period and year-to-date, and overtime limits for a group of employees or your direct reports.
Approve Overtime Requests - Select an Employee	TL_OT_MNGR_LIST	Manager Self Service, Time Management, Approve Time and Exceptions, Overtime Requests, Approve Overtime Requests	Approve or deny employees' overtime requests. You can approve or deny multiple requests at the same time.
Approve Employee Overtime	TL_OT_APPR	Manager Self Service, Time Management, Approve Time, Overtime Requests Click the date link of the overtime request on the Approve Overtime Requests page. Click the link provided in an email or through the worklist.	Approve or deny a single overtime request. You can also add comments that the employee can see.

Viewing Employee Overtime Requests

Access the Request Overtime - Overtime Request Details page.

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Request Overtime - Overtime Request Details page

When the page is first accessed, this group box lists up to three of the employee's most recent overtime requests and the status of each request: *Submitted, Approved,* or *Denied.* If there are more than three requests and you want to see all of them, select the View All Requests check box and click View Requests.

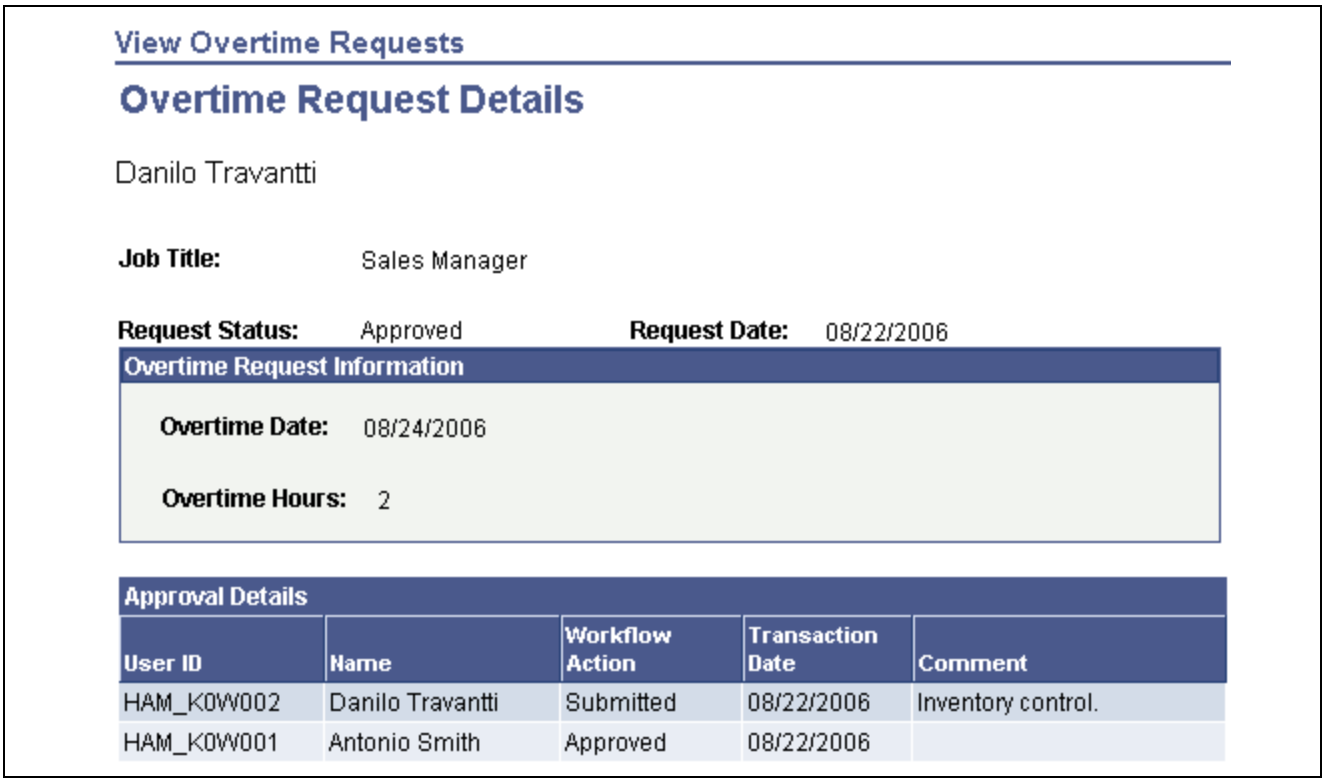
- To view requests for a different month, select the month and year and click View Requests.
- To view the approval details for a request or see comments that were submitted with a request, click the overtime date.

  The Overtime Request Details page appears. To view all requests, check the View All Requests check box and then click the View Requests button.

Viewing the Details of an Overtime Request

Access the Request Overtime – Overtime Request Details (view) page.

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View Overtime Requests

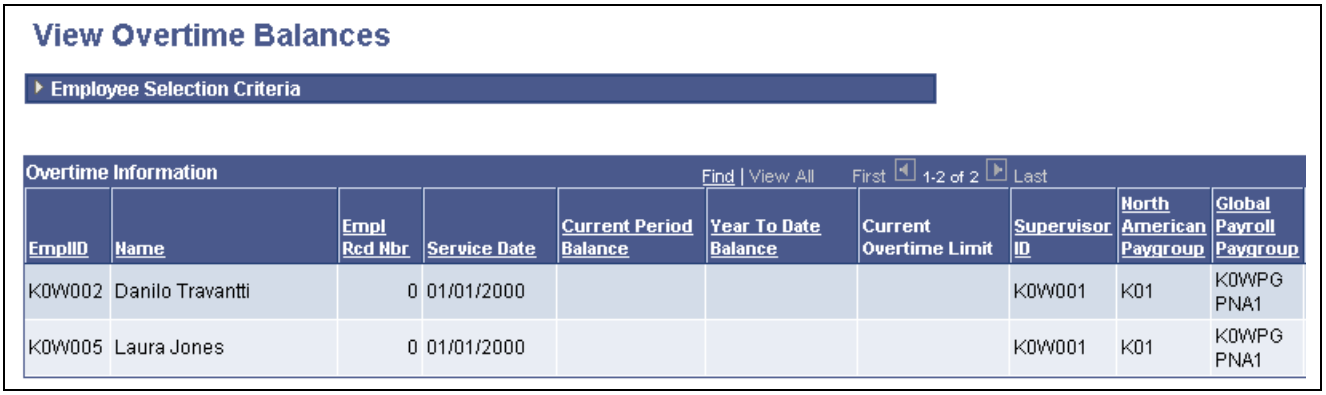
This page is the same as the Overtime Request Details page that employees can access.

See Also

Chapter 20, "Using Self-Service Components," Viewing Details of an Overtime Request, page 581

Viewing Overtime Balances and Limits (Managers)

Access the Approve Overtime Requests – View Overtime Balances page.



Approve Overtime Requests – View Overtime Balances page

Overtime Information

Service Date Displays the employee's service date from the Employment record. No service date is listed for non-employees.

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Current Period Balance The number of overtime hours in payable time from the beginning of the period to the current date. The period is the same as that defined for the overtime limit. The balance includes hours for all overtime TRCs that are included in the overtime limit definition associated with the employee's workgroup. If an overtime limit is not defined on the employee's workgroup, the current period balance is not displayed. The overtime TRCs (OT TRC List) and time period from the overtime limit are used to resolve the current period balance.

Note. If the user's row security permission list is defined to use the TL system date, the system date is treated as the current date for the purpose of calculating the balance. You define row security permission lists on the Row Security Permission List page (Set Up HRMS, Security, Time and Labor Security, TL Permission List Security).

Year to Date Balance The number of overtime hours in payable time from the beginning of the year to the current date. The balance includes hours for all overtime TRCs that are included in the overtime limit definition associated with the employee's workgroup. If an overtime limit is not defined on the employee's workgroup, the Year to Date balance is not displayed. The overtime TRCs (OT TRC List) and time period from the overtime limit are used to resolve the Year to Date period balance.

Note. If the user's row security permission list is defined to use the TL system date, the system date is treated as the current date for the purpose of calculating the balance. You define row security permission lists on the Row Security Permission List page (Set Up HRMS, Security, Time and Labor Security, TL Permission List Security).

Current Overtime Limit This column displays symbols designating overtime limit information.

See Building and Viewing Time Period Calendars.

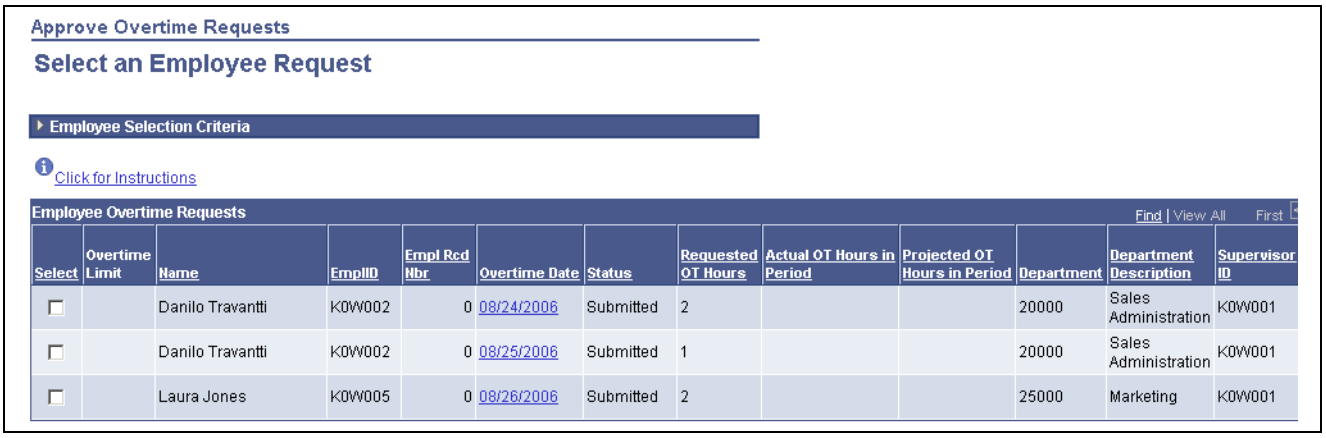
Overtime Exceeded The Overtime Exceeded button appears if the maximum number of overtime hours allowed for the current period according to the overtime limit definition is exceeded.

Overtime Error The Overtime Error button appears if the system cannot resolve the time period for the overtime request because the time period for the overtime limit found on the employee's workgroup is not built for the current period. Once you build the time period, the system can display the balances.

Approving and Denying Multiple Overtime Requests

Access the Approve Overtime Requests - Select an Employee Request page.

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Approve Overtime Requests

Select an Employee Request

Employee Selection Criteria

Click for Instructions

Employee Overtime Requests — Find | View All — First

Select	Overtime Limit	Name	EmplID	Empl Rcd Nbr	Overtime Date	Status	Requested OT Hours	Actual OT Hours in Period	Projected OT Hours in Period	Department	Department Description	Supervisor ID
☐		Danilo Travantti	KOW002	0	08/24/2006	Submitted	2			20000	Sales Administration	KOW001
☐		Danilo Travantti	KOW002	0	08/25/2006	Submitted	1			20000	Sales Administration	KOW001
☐		Laura Jones	KOW005	0	08/26/2006	Submitted	2			25000	Marketing	KOW001

Approve Overtime Requests - Select an Employee Request page

To approve or deny requests:

1. Identify the requests to approve or deny by:
   - Select the check box next to the requests, or
   - Click the Select All check box to select all unapproved requests.
2. Click the Approve Selected or Deny Selected button.

See Enabling Workflow.

Overtime Limit This column displays symbols for exceeding overtime and errors in entering overtime requests.

See Building and Viewing Time Period Calendars.

Overtime Exceeded The Overtime Exceeded button appears in this field when an employee has already exceeded the overtime limits for the period of the request or will exceed the limit if the request is approved.

Overtime Error The Overtime Error button appears here if the system cannot resolve the time period for the overtime request because the time period for the overtime limit found on the employee's workgroup is not built for the current period. After you build the time period, the system can display the balances.

Overtime Date The date for which overtime is requested. Click a date to access the Overtime Request Details page, where you can approve or deny the request.

Requested Overtime Hours The number of overtime hours the employee is requesting.

Actual OT Hours in Period (actual overtime hours in period) The number of overtime hours reported for this period—up to and including hours reported for the overtime request date—that have been converted to payable time. (Reported time is converted to payable time by the Time Administration process.)

For example, assume the following:

- The current time reporting period is July 8 to 14.
- Overtime hours in payable time are: July 8 is 5 hours and July 9 is 5 hours.
- Requested overtime hours is 5 for July 9.
- Actual overtime hours in period is 10.

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Projected Overtime Hours The sum of the Requested Overtime Hours and the Actual Overtime Hours in Period where Requested Hours does not equal Actual Hours Worked. See the following examples for more information about Projected Overtime Hours calculations.

See Understanding the Time Administration Process Flow.

Examples: Projected Overtime Hours Calculations

These examples illustrate various scenarios for Projected Overtime Calculations based on variations in requested and actual overtime hours and period definitions.

- Example 1: Requested overtime hours with no actual overtime hours in the period.
  - Overtime limit = 8 hours per PSMONTH Time Period.
  - Current month = March 2002.
  - Month for overtime requests = March 2002.

Name	Overtime Date	Requested OT Hours	Actual OT Hours in Period	Projected OT Hours in Period
Mary Agar	3/20/02	8	0	8
Mary Agar	3/21/02	8	0	16
Mary Agar	5/5/02	8	0	8

- Example 2: Actual overtime hours in payable time that match hours requested for overtime.
  - Overtime Limit = 8 hours per PSMONTH Time Period.
  - Current month = March 2002.

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- Month for overtime requests = March 2002.

Name	Overtime Date	Requested OT Hours	Actual OT Hours in Period	Projected OT Hours in Period
Mary Agar	3/1/02	8	0	8
Mary Agar	3/5/02	12	0	20
Mary Agar	3/9/02	5	8	25
Mary Agar	3/12/02	8	8	33
Mary Agar	3/17/02	7	20	40

Note. The system does not count the 20 hours of actual overtime hours in payable time because they were already requested on March 1, 2002 and March 5, 2002.

- Example 3: Requested overtime hours and actual overtime hours in payable time that do not match requested overtime hours.
  - Current month = March 2002.
  - Month for overtime requests = March 2002.

Name	Overtime Date	Requested OT Hours	Actual OT Hours in Period	Projected OT Hours in Period
Mary Agar	3/01/02	8	0	8
Mary Agar	3/02/02	8	4	20
Mary Agar	3/10/02	8	8 (4 hrs from 3/2 & 4 hrs from 3/10/02)	32

Note. The system adds the actual overtime hours to the projected overtime hours if they do not match requested overtime hours.

- Example 4: Requested overtime hours and additional actual overtime hours generated from rules, as well as actual overtime hours that match requested overtime hours.
  - Current month = March 2002.

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- Month for overtime requests = March 2002.

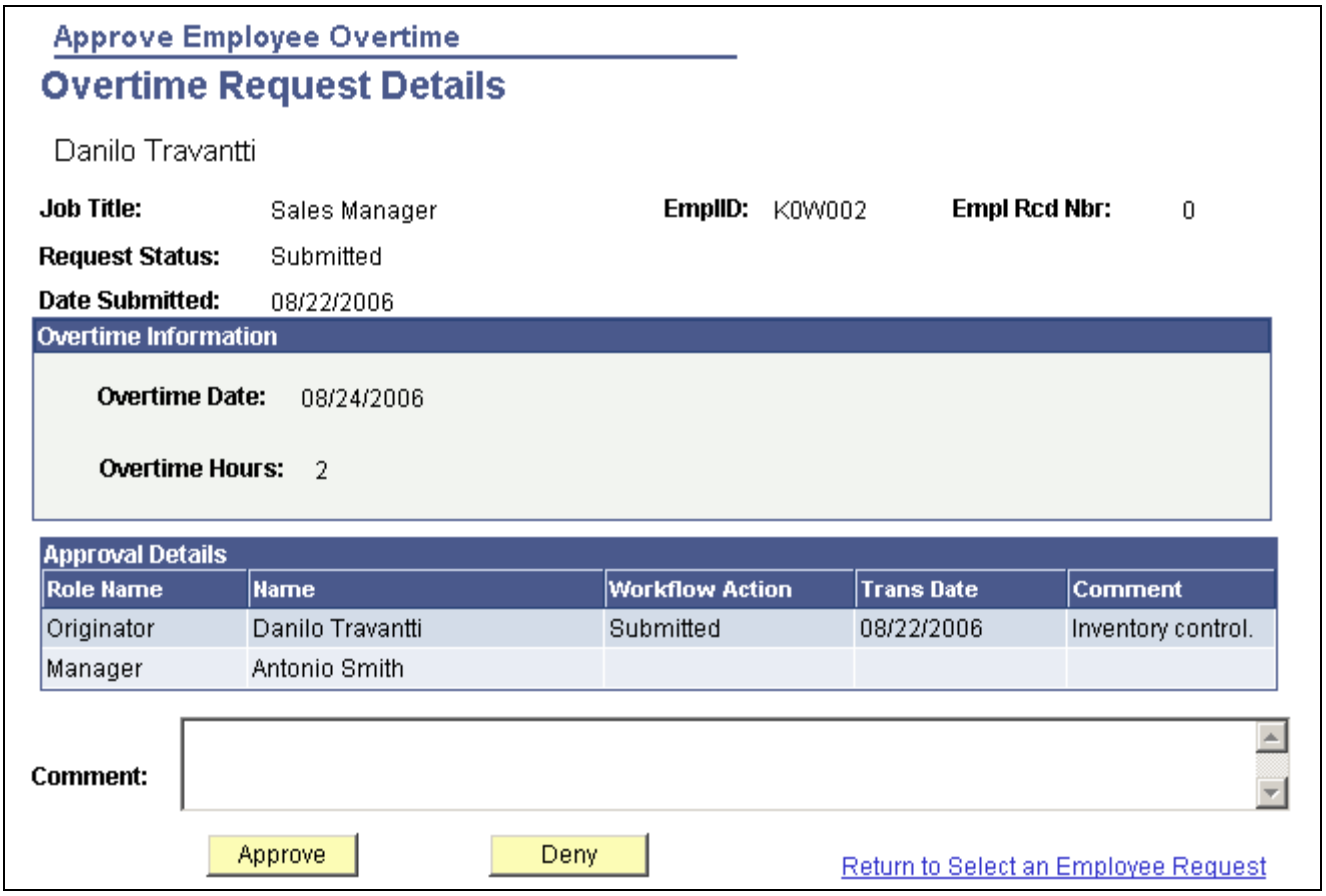
Name	Overtime Date	Requested OT Hours	Actual OT Hours in Period	Projected OT Hours in Period
Mary Agar	3/01/02	8	0	8
Mary Agar	3/02/02	8	8	16
Line not shown on page, overtime hours generated in payable time from rules.	3/04/02		16	24
Mary Agar	3/10/02	8	16	32

Note. On March 4, 2002, there were eight hours of overtime generated from rules, that were not requested. These are added to the projected overtime hours behind the scenes because there is no overtime request for this date. The Time Administration process has not yet been run for March 10, 2002.

Approving Single Overtime Requests

Access the Approve Employee Overtime - Overtime Request Details page.

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Approve Employee Overtime – Overtime Request Details page

This page is the same as the Overtime Request Details (view) page, but contains these additional fields:

Comment	Explain why the request is being approved or denied. The information you enter here appears on the employee's Overtime Request Details page.
Approve	Click to approve the request.
Deny	Click to deny the request.
Show All Overtime Requests	This link takes you to a listing of all overtime requests for the employee as a reference. Use Cancel to return to the individual request to approve or deny.

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CHAPTER 22

Using Manager Self-Service for Scheduling Components

This chapter provides an overview of manager self-service for scheduling components and discusses how to:

- Set up manager search options.
- Assign schedules.
- Manage schedules.
- Integrate training data from PeopleSoft Enterprise Learning Management.

Understanding Manager Self-Service for Scheduling Components

The Manager Self-Service for Scheduling components enable managers to assign, view, change, and override work schedules (SCH_MNG_PERIOD).

In addition to viewing coverage, assigned shifts, and total work hours, managers can identify individuals with planned absences or training, holidays, and no shows (those employees who have not reported in for a scheduled punch shift). The manager can also view employees with multiple shifts in a day, those who have shifts that span midnight, and those which have changing task elements over a shift.

If updates need to be made to the schedule, managers can schedule replacements, swap shifts, copy schedules, and make short- and long-term schedule changes.

A generic interface to the open scheduling architecture can be accessed to load optimized work schedules or data from other systems, including training data from Learning Management.

Employees can update their schedule preferences, such as preferred contact information for schedule updates (phone or email), willingness to work a compressed work week, and daily shift preferences. When a manager wants to replace, swap, or copy a schedule, the employee preferences can be viewed to determine the best available replacement or schedule.

Time reporters are in a static or dynamic groups to which a manager has access or a manager has access to time reporter data through HRMS data permission security. Managers are restricted from viewing and changing their own data on these pages:

- Manage Exceptions page
- Approve Payable Time and Approve Reported Time pages
- Manage Schedules page
- Manager Calendar Views page

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Setting Up Manager Search Options

This section discusses how to set up manager search options that are common to all self-service pages that managers access.

Pages Used to Set Up Manager Search Options

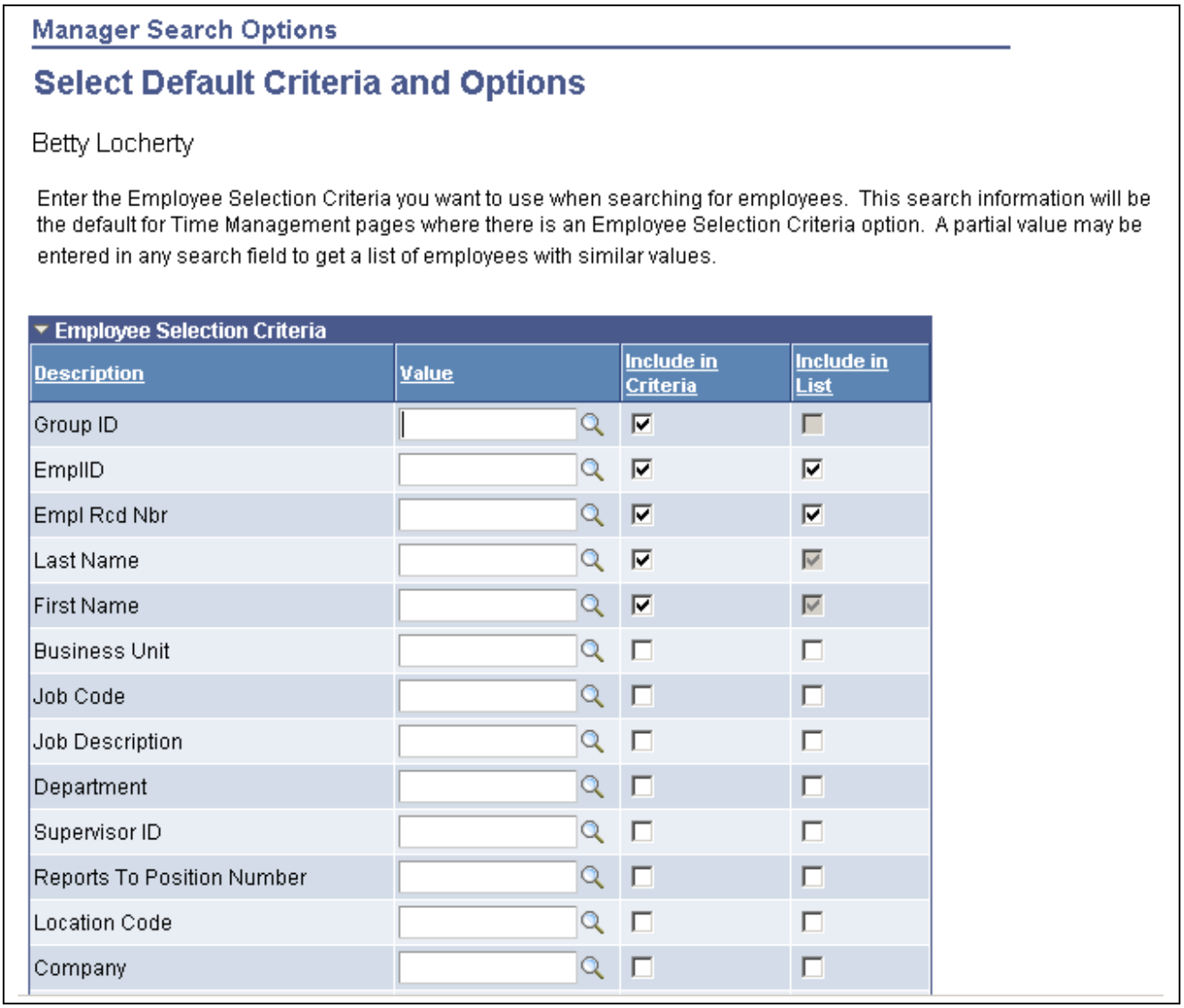
Page Name	Object Name	Navigation	Usage
Manager Search Options - Select Default Criteria and Options	TL_MSS_SRCH_OPTION	Manager Self Service, Time Management, Manager Search Options, Manager Search Options	Set up preferences and display options for viewing employees. Enter the employee selection criteria you want to use when searching for employees. This search information will be the default for manager self service pages where there is an Employee Selection Criteria option. A partial value may be entered in any search field to get a list of employees with similar values.

Selecting Manager Search Options

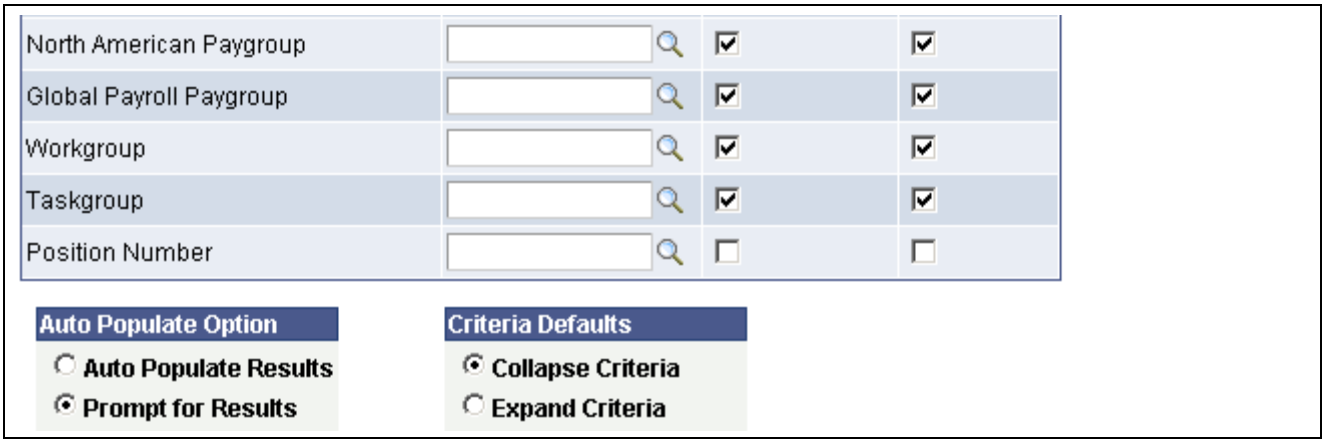
The Manager Search Options page allows each manager to specify criteria and display options for searching employees. The search information is used as the default for manager self service pages where there is an Employee Selection Criteria option. If a manager does not save the Options page, then the search options defaults from the Manager Search Defaults page included in the Time and Labor Installation process.

Access the manager Search Option page.

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Manager Search Options page (1 of 2)



Manager Search Options page (2 of 2)

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This page allows each manager to specify criteria and display options for searching employees. The search information is used as the default for manager self service pages where there is an Employee Selection Criteria option. If a manager does not save the Options page, then the search options defaults from the Manager Search Defaults page included in the Time and Labor Installation process.

Value If the Include in Criteria field is selected for a particular row, make an entry, if required, in the Value field to use as default search criteria.

Include in Criteria This field is used to denote whether the field is displayed as part of the criteria that can be searched on.

Note. Only select Workgroup or Taskgroup if Time and Labor is installed, and you are looking for employees that are enrolled in Time and Labor.

Include in List This field is used to determine if the field is displayed in the employees grid.

Note. Only select Workgroup or Taskgroup if Time and Labor is installed, and you are looking for employees that are enrolled in Time and Labor.

Auto Populate Option, Criteria Defaults These fields work in conjunction with each other. With AutoPopulate Results selected and Collapse Criteria selected, the grid auto populates based on the criteria and the criteria is collapsed. With AutoPopulate Results selected and Expand Criteria selected, the grid auto populates based upon the criteria and the criteria is expanded. With Prompt for Results selected and Collapse Criteria selected, the grid does not auto populate. Instead, click the Get Employees button to populate the employee grid; the criteria is collapsed. With Prompt for Results selected and Expand Criteria selected, the grid does not auto populate. Instead, click the Get Employees button to populate the employee grid; the criteria is expanded.

Note. If you are entering values in the fields: Location, Job Code, Job Title, or Department, enter an HR Business Unit value to derive the SETID for these other fields. If you do not enter an Business Unit, the system derives the HR Business Unit from your Job Data to determine the default SETID for these values.

See Chapter 4, "Setting Up Basic Tables," Manager Search Defaults, page 39.

Assigning Schedules

This section discusses how to assign a schedule to a time reporter.

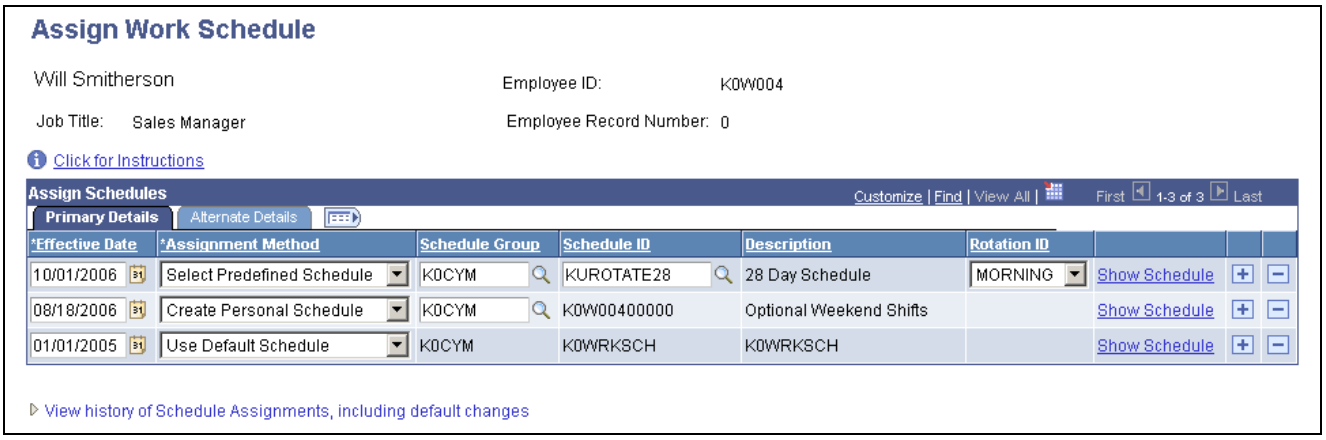
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Pages Used to Assign Schedules

Page Name	Object Name	Navigation	Usage
Assign Work Schedule	SCH_ASSIGN	Manager Self Service, Time Management, Manage Schedules, Assign Work Schedule, Assign Work Schedule	Assign a time reporter to a schedule.
Personal Schedule Definition	SCH_DEFINITION	Manager Self Service, Time Management, Manage Schedules, Assign Work Schedule. Select the Create Personal Schedule value in the Assignment Method field. Click the Create Schedule link.	Create a personal schedule for a time reporter.
Schedule Shifts	SCH_DEFINITION_2	Manager Self Service, Time Management, Manage Schedules, Assign Work Schedule. Select the Create Personal Schedule value in the Assignment Method field. Click the Create Schedule link, Schedule Shifts.	Enter shift details for a personal schedule definition.
Schedule Calendar	SCH_CALENDAR	Manager Self Service, Time Management, Manage Schedules, Assign Work Schedule, Click the Schedule Calendar link on the Schedule Shifts page.	Display the schedule, change the date or view the previous and next periods of the schedule.

Assigning Schedules to a Time Reporter

Access the Assign Work Schedule page.



Assign Work Schedule page

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

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Click for Instructions The Click for Instructions link expands to show instructional text on using the page.

Click to Hide Instructions Click this link to collapse the instructional text that displayed when the Click for Instructions link was selected.

Assignment Method Select *Create Personal Schedule*, *Select Predefined Schedule* and *Use Default Schedule*.

When selected, the *Create Personal Schedule* value allows you to create a effective dated personal schedule for this employee. A Create Schedule link is displayed on the right side of the grid. In addition, you can select a Schedule Group for the employee. The Schedule ID is automatically populated with the EmplID, Employee Record Number and three additional digits.

The *Select Predefined Schedule* value enables you to select a Schedule Group and an associated Schedule ID.

The *Use Default Schedule* value derives a default schedule for the time reporter. For Global Payroll, the schedule defaults from the Global Payroll pay group assigned to an employee (from the JOB Data record). For Time and Labor employees that are not in Global Payroll, the schedule defaults from the workgroup assigned to employees on the Maintain Time Reporter Data page when they are enrolled in Time and Labor. If no row is displayed for schedule assignment, the schedule resolution process still resolves the default schedule on the Global Payroll pay group assigned to an employee, or the default schedule on the employee's workgroup if not enrolled in a Global Payroll pay group.

Schedule Group Schedule Groups are used to group employees with like schedules. A Schedule Group must be entered. For default schedules, both the workgroup and Global Payroll pay groups have Schedule Groups associated with a Schedule ID. The Schedule Group is associated with a SetID, so only valid schedules for a particular SetID that is associated to an employee are displayed.

Star icon A star icon appears in the Assign Schedules group box, when you assign an employee a default schedule from either a Time and Labor workgroup or a Global Payroll pay group, and the default schedule has changed over time. This default assignment can occur manually, or as a result of an employee hire triggering the Workforce Sync message to insert a default assignment row in Assign Work Schedule.

The Assign Schedules group box displays the Schedule ID that is most current at the time, from the workgroup or pay group, despite the schedule assignment effective date. The display of this Schedule ID assists in determining which schedule the system is currently using for schedule resolution. The display of the star icon alerts you to review the History of Schedule Assignments, Including Default Changes section to determine what the schedule changes are from the initial schedule assignment to the current date.

Rotation ID If the schedule assigned to an employee is a rotating schedule, the Rotation ID field will be displayed next to the Schedule. The Rotation ID is used to determine what relative day in the schedule an employee should be assigned to.

Show Schedule The Show Schedule link will take the user to the derived Schedule Calendar that can be viewed as of the effective date of the schedule assignment.

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View history of Schedule Assignments, including default changes Click this link to expand the section to show all of the schedule assignments, including what default schedules may have changed either on a Global Payroll pay group or Time and Labor workgroup, if the user has a default schedule assigned.

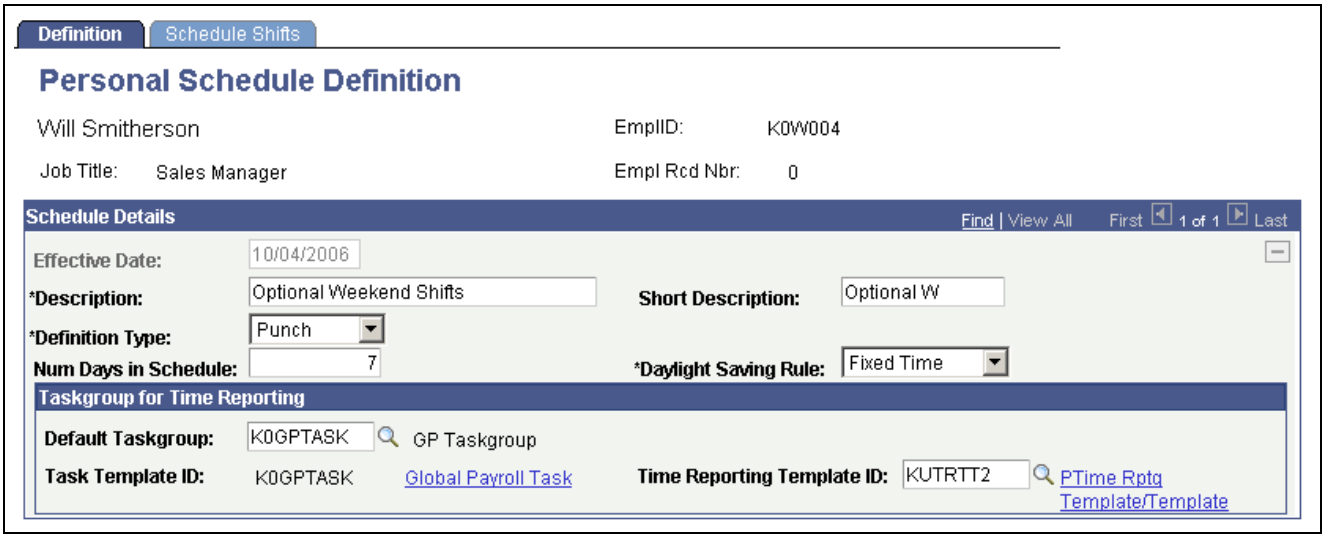
See Also

Chapter 10, "Setting Up Time Reporters," Assign Schedule to a Group, page 218

Chapter 8, "Defining Work Schedules," page 161

Personal Schedule Definition

Access the Personal Schedule Definition page.



Personal Schedule Definition page

Description Enter a description for this personal schedule.

Definition Type Options are *Punch*, *Elapsed*, and *Flex*.

See Chapter 8, "Defining Work Schedules," Creating Work Schedules and Schedule Definitions, page 164.

Num Days in Schedule Enter the number of days in this schedule pattern.

Daylight Savings Rule Options are *Fixed Time* and *Fixed Duration*. The Daylight Savings Rule is relevant for punch or flex schedules. This determines when a schedule is resolved on a daylight savings day, whether the end time of the shift should remain fixed, or the number of scheduled hours (duration) should remain fixed.

Default Taskgroup Enter a default Taskgroup to schedule task elements or time reporting elements with this schedule

Task Template ID This value is derived from the entry in the Default Taskgroup field.

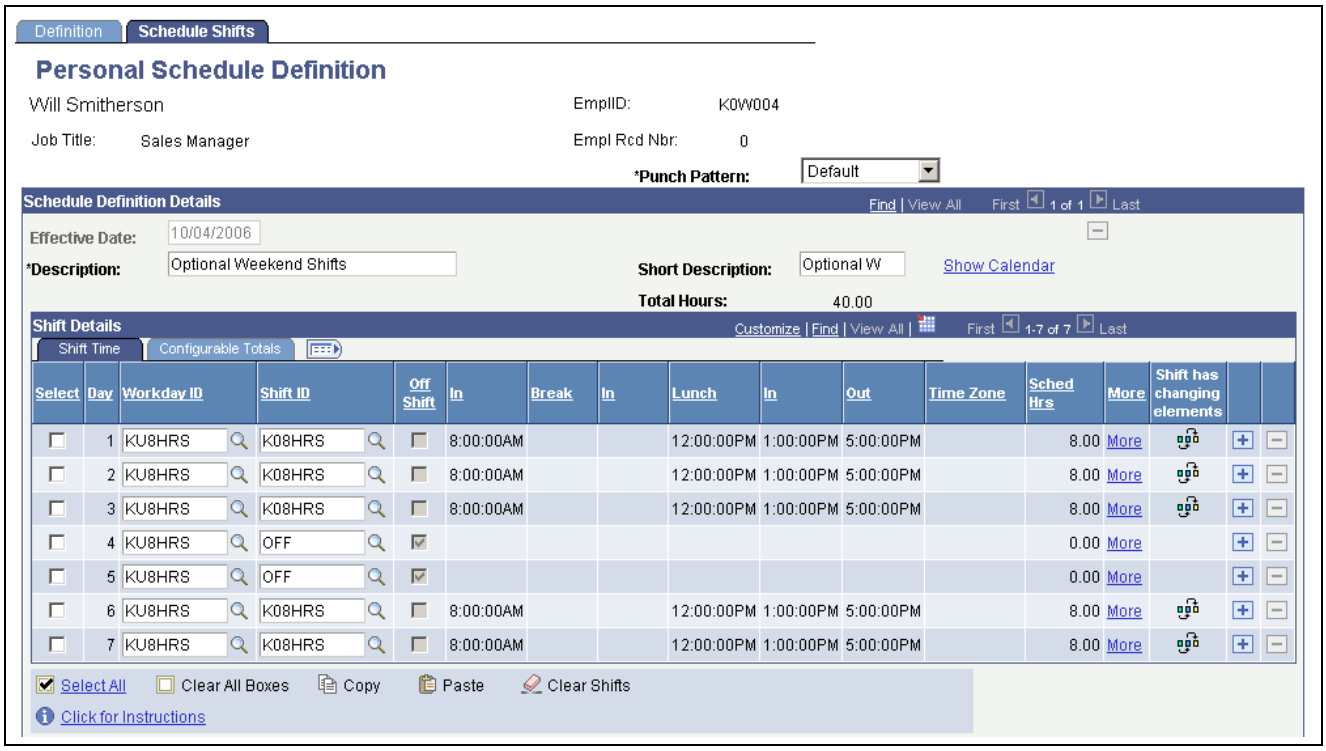
Time Reporting Template ID This value is derived from the entry in the Default Taskgroup field and also depends on the selection in the Definition Type field. You can change the value in this field if the one that is derived does not provide the required time reporting elements.

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Click the links for the Task Template and Time Reporting Template ID to view the templates for reference.

Note. Rotations cannot be defined for personal schedules as they are only used by a single employee.

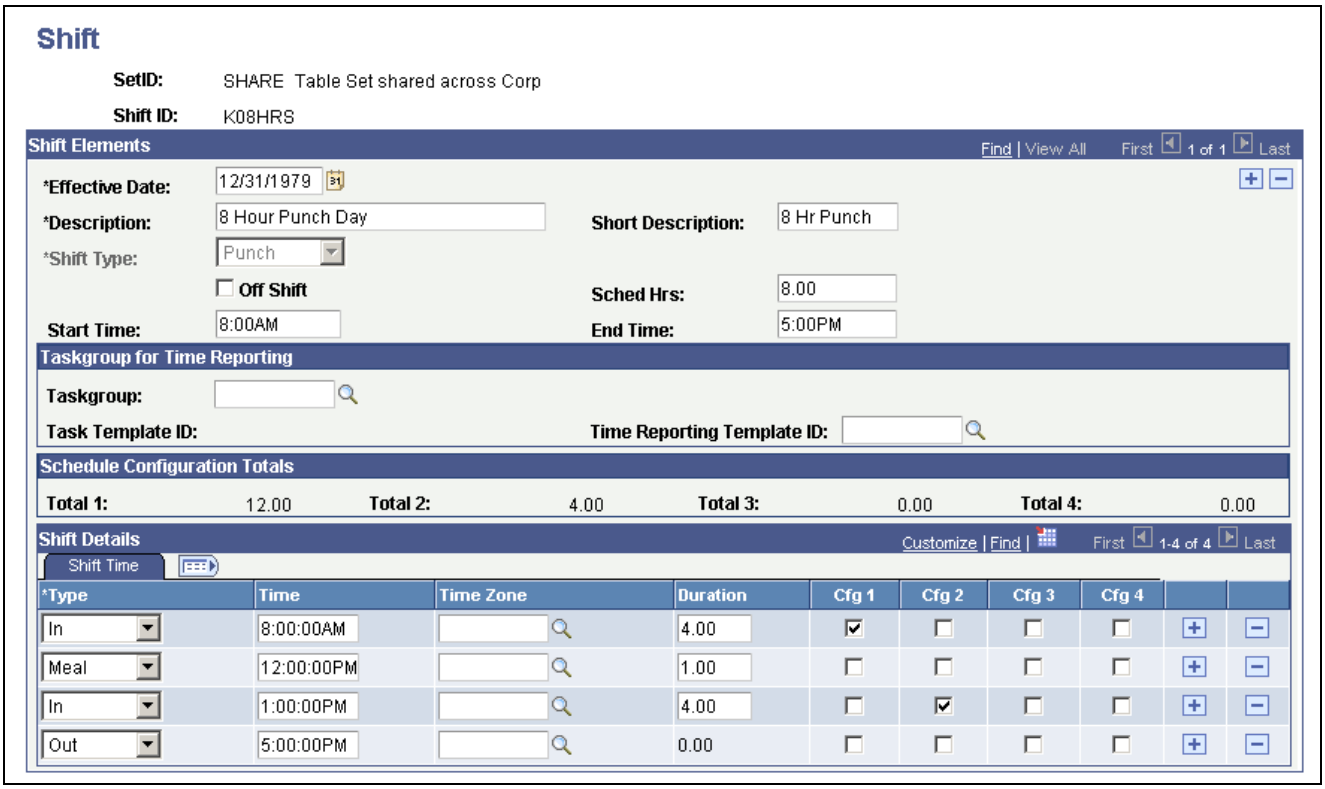
Access the Schedule Shifts page.



Schedule Shifts page

More Click a link in this column to open the Shift page.

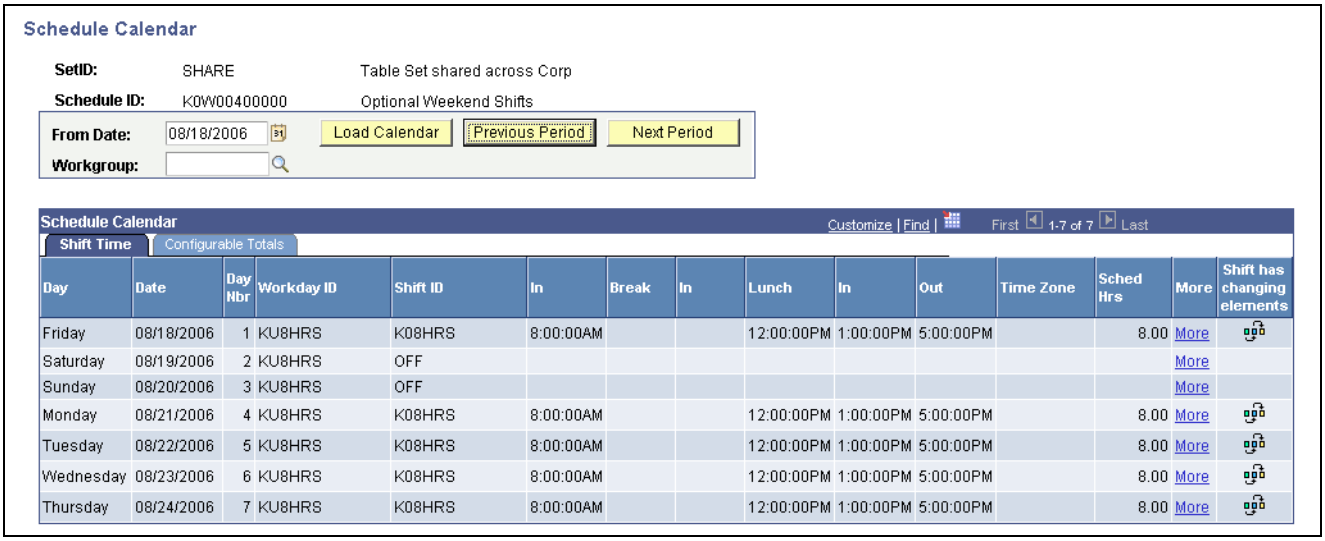
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Shift page

Schedule Calendar

Access the Schedule Calendar page.



Schedule Calendar page

From Date Enter date or period to change the schedule calendar view.

Load Calendar Click this button to display the schedule for a period based on the entry in the From Date field.

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There is no process to build the schedule calendar. It is derived from the schedule definition pattern and the Time and Labor Dates table.

The Schedule Calendar page lists all of the elements associated to the schedule. The page also resolves the actual "day" associated with the dates of the schedule.

If it is a punch schedule, all of the punch types associated with the punch schedule will be displayed across the top of the page. If the punch types pattern varies from one shift to another, then the page will use the "all punch" pattern, to display all of the punches found in the PSPCHNONE time reporting template.

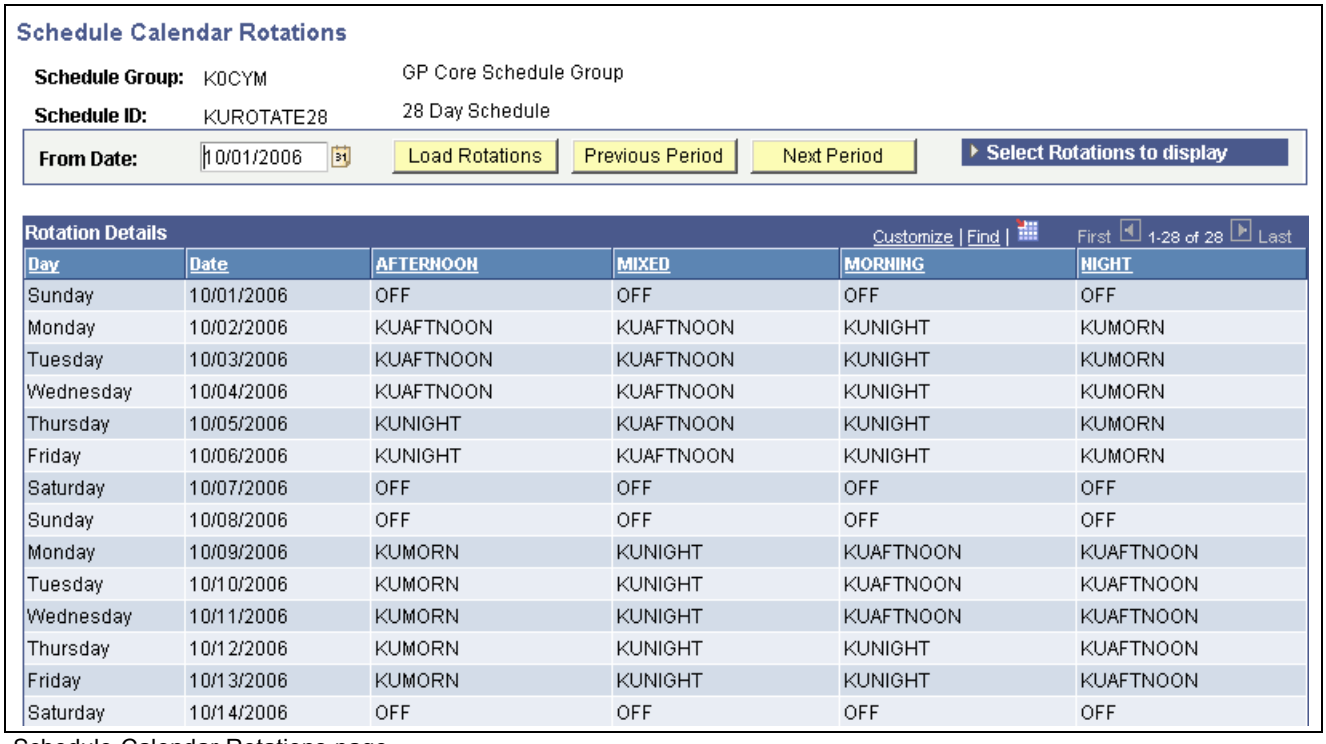
The DUR column is for use when Time and Labor is installed, it determines the daybreaker of the workgroup associated with the employee, and displays if the scheduled shift or time will fall on the actual day displayed (0 — zero) or the day before (-1) or the next day (+1).

If the schedule is a rotating schedule, then the Compare Rotations link displays where the user can compare rotations.

Note. If a user sets up a Shift or Schedule Definition that spans more than 24 hours, the shift displays the begin date of when the shift began.

Schedule Calendar Rotations

Access the Schedule Calendar Rotations page.



Schedule Calendar Rotations

Schedule Calendar Rotations

Schedule Group: K0CYM GP Core Schedule Group

Schedule ID: KUROTATE28 28 Day Schedule

From Date: 10/01/2006 | Load Rotations | Previous Period | Next Period | Select Rotations to display

Rotation Details Customize | Find | First 1-28 of 28 Last

Day	Date	AFTERNOON	MIXED	MORNING	NIGHT
Sunday	10/01/2006	OFF	OFF	OFF	OFF
Monday	10/02/2006	KUAFTNOON	KUAFTNOON	KUNIGHT	KUMORN
Tuesday	10/03/2006	KUAFTNOON	KUAFTNOON	KUNIGHT	KUMORN
Wednesday	10/04/2006	KUAFTNOON	KUAFTNOON	KUNIGHT	KUMORN
Thursday	10/05/2006	KUNIGHT	KUAFTNOON	KUNIGHT	KUMORN
Friday	10/06/2006	KUNIGHT	KUAFTNOON	KUNIGHT	KUMORN
Saturday	10/07/2006	OFF	OFF	OFF	OFF
Sunday	10/08/2006	OFF	OFF	OFF	OFF
Monday	10/09/2006	KUMORN	KUNIGHT	KUAFTNOON	KUAFTNOON
Tuesday	10/10/2006	KUMORN	KUNIGHT	KUAFTNOON	KUAFTNOON
Wednesday	10/11/2006	KUMORN	KUNIGHT	KUAFTNOON	KUAFTNOON
Thursday	10/12/2006	KUMORN	KUNIGHT	KUNIGHT	KUAFTNOON
Friday	10/13/2006	KUMORN	KUNIGHT	KUNIGHT	KUAFTNOON
Saturday	10/14/2006	OFF	OFF	OFF	OFF

This page enables you to compare the rotations that you select to analyze the patterns for each rotation as of the effective date of the schedule assignment. You can change the date or period to view the schedule pattern in a different time period. The schedule pattern displayed is the length of the actual schedule. If the schedule is 28 days in length, that is the actual pattern that is displayed in the Schedule Calendar.

The offers the user all of the Rotations associated to the Schedule. The user can choose which rotations to compare in the schedule calendar display. All Rotation IDs are selected by default.

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Managing Schedules

This section lists common elements and discusses how to:

- Set up manage schedule display options.
- Manage schedules.
- Schedule replacements.
- Copy schedules.
- Swap schedules.

Common Elements Used in This Section

Date Fields and Link Names

If *Day* is selected in the View By field, enter or click the Previous or Next Day links to change the Date value. For Punch type employees, a bar in the Employee grid indicates the start time and end time of a shift.

If *Week* is selected in the View By field, enter or click the Previous or Next Week links to change the Week Of value. The Total Scheduled Hours link with Start time and End time is displayed in the Employee grid.

If *Date Range* is selected in the View By field, enter or click the Previous or Next Range links to change the Start Date, End Date, or both values. The maximum number of days a date range can span is 31. The Total Scheduled Hours link with Start time and End time is displayed in the Employee grid.

Pages Used to Manage Schedules

Page Name	Object Name	Navigation	Usage
Manager Search Options	TL_MSS_SRCH_OPTION	Manager Self Service, Time Management, Manager Search Options	Set up preferences and display options for viewing employees. Enter the employee selection criteria you want to use when searching for employees. This search information will be the default for manager self service pages where there is an Employee Selection Criteria option. A partial value may be entered in any search field to get a list of employees with similar values.
Manage Schedules Display Options	SCH_MNG_OPTIONS	Manager Self Service, Time Management, Manage Schedules, Manage Schedules, Scroll down and click the Schedule Display Options link. (The page opens in a new window.)	Set up preferences and display options for viewing schedules.

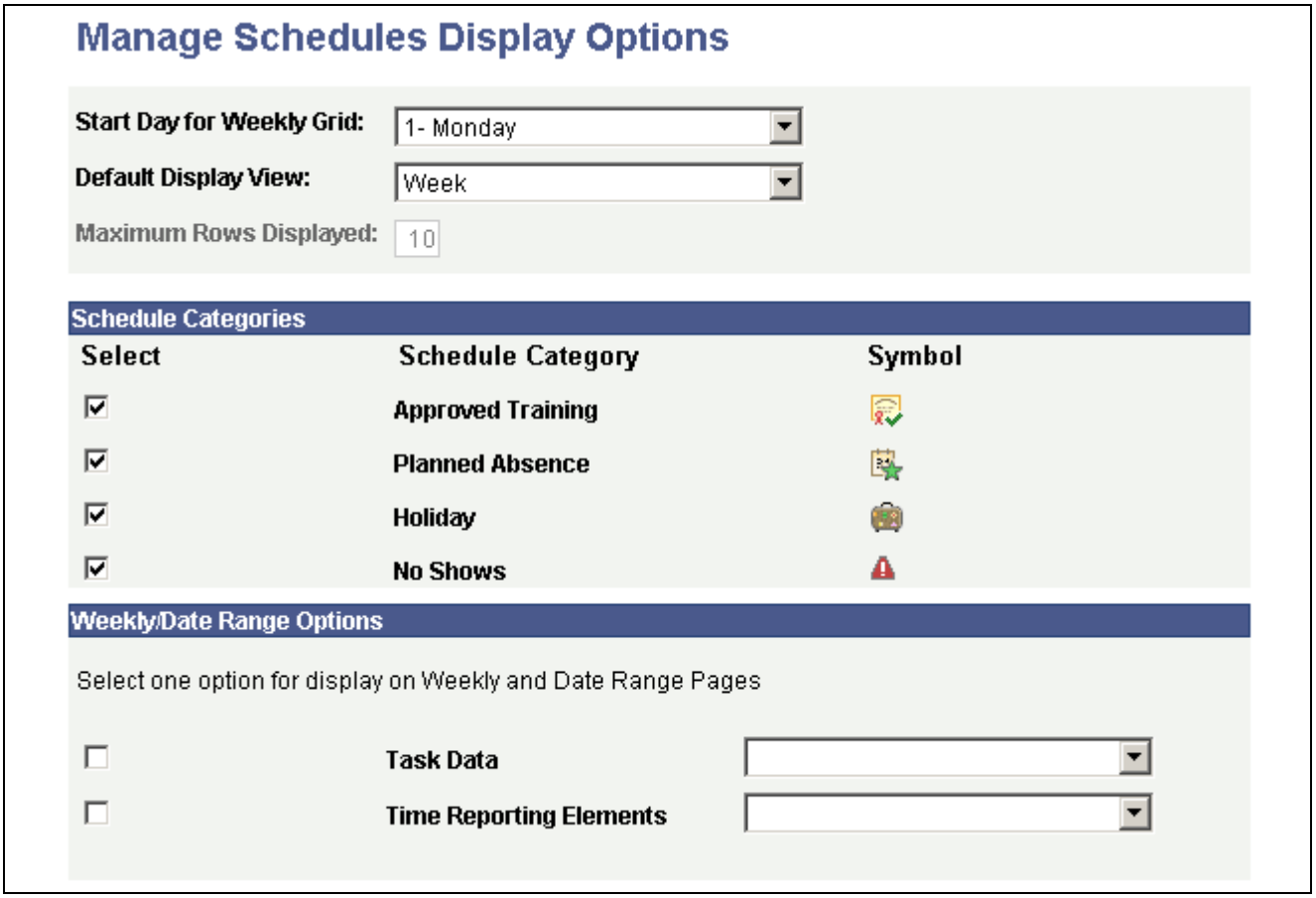
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Page Name	Object Name	Navigation	Usage
Schedule Preferences	SCH_EE_PREF	Manager Self Service, Time Management, Manage Schedules. Click the employee name link.	View an employee's contact and schedule preferences.
Daily Schedules, Weekly Schedules, Date Range Schedules	SCH_MNG_DAILY, SCH_MNG_WEEKLY, SCH_MNG_DRANGE	Manager Self Service, Time Management, Manage Schedules, Manage Schedules. Select an option in the View By field.	Adjust a time reporter's schedule.
Daily Detail	SCH_MNG_DAILY_DTL	Manager Self Service, Time Management, Manage Schedules, Manage Schedules. Click the link in the Daily Schedule Details column on the Daily Schedules page. On the Weekly Schedules and Date Range Schedules pages, click the link in the Date column.	Override a schedule, refresh or add a schedule for the day, or enter a new schedule for the day.
Schedule Replacement	SCH_MNG_REPLACE	Select one check box in the Select column and click the Schedule Replacements button on the Daily, Weekly, or Date Range Schedule pages.	Schedule a replacement for an employee for a day.
Copy Schedules	SCH_MNG_COPY	Select one check box in the Select column and click the Copy Schedules button on the Daily, Weekly, or Date Range Schedule pages.	Copy an employee schedule to be used by another employee for a day or specified date range.
Swap Schedules	SCH_MNG_SWAP	Select two check boxes in the Select column and click the Swap Schedules button on the Daily, Weekly, or Date Range Schedule pages.	Swap two employees' schedules.
Scheduled Hours	TL_SCHRPT_RNCTL	Time and Labor, Reports, Scheduled Hours	Generate TL004 that 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.

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Setting Up Manage Schedule Display Options

Access the Manage Schedule Display Options page.



Manage Schedules Display Options page

Use this page to set defaults for the Manage Schedules pages.

Start Day for Weekly Grid Select a day of the week that a schedule should be displayed.

Default Display View Select the default display view that the Manage Schedule page should use when entering the page. Select the *Day* value for the default Daily Schedules page (SCH_MNG_DAILY), the *Week* value for the default Weekly Schedules page (SCH_MNG_WEEKLY), and the *Date Range* value for the default Date Range Schedules page (SCH_MNG_DRANGE).

Maximum Rows Displayed This field is display only and displays a maximum of ten employees at a time.

Schedule Categories Select the Schedule Category values to display the respective icons on the Employee grid on the Manage Schedules pages. A legend also appears on the Manage Schedules pages with a description of each category and icon.

Values are *Approved Training*, *Planned Absence*, *Holiday* and *No Shows*.

Note. The *No Shows* value only displays for the Daily Schedules page. *No Shows* information is stored, so any *No Shows* information from the past can be viewed.

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Weekly/Date Range Options

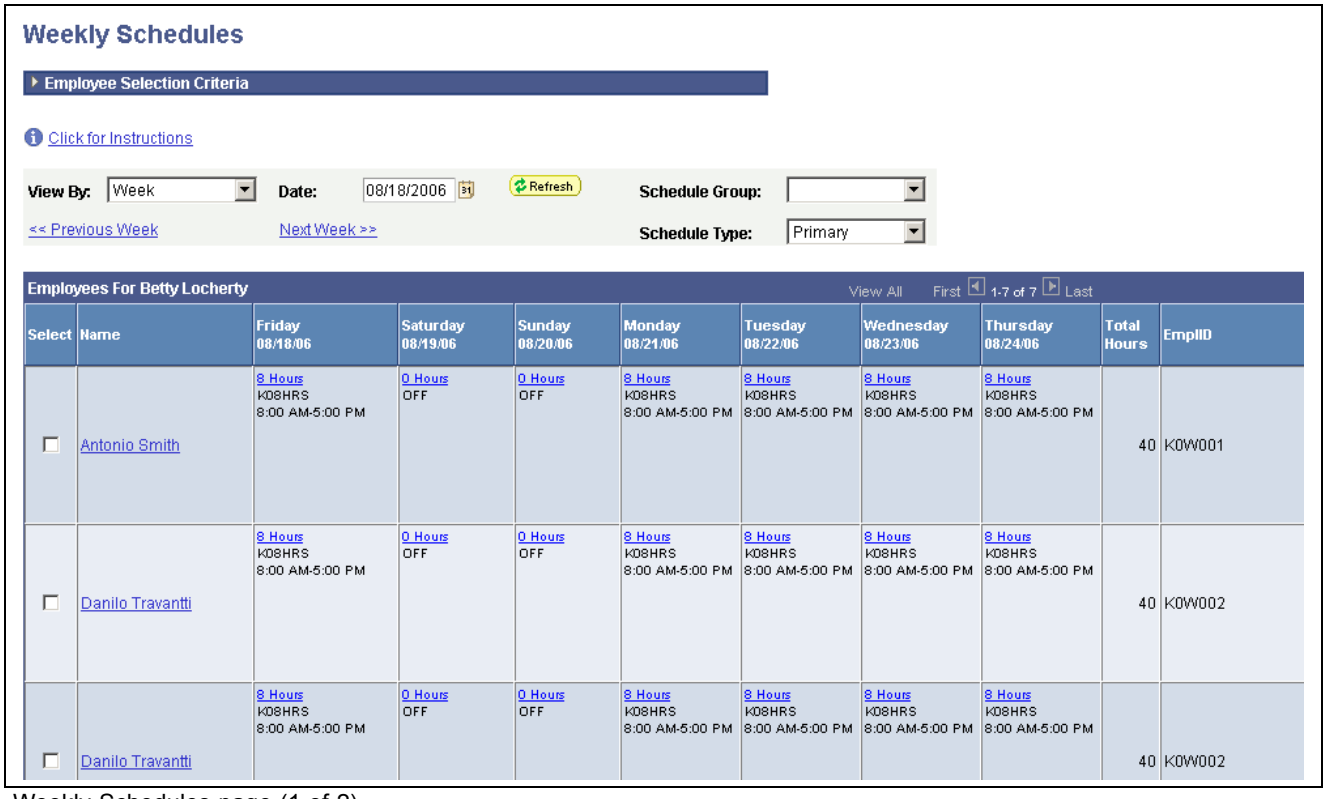
Choose one value to display on the Weekly and Date Range pages. Values are *Task Data* and *Time Reporting Elements.* If using the *Task Data* and *Time Reporting Elements,* select a field value for each from the drop-down list box. From the Task Data drop-down list, the values are: *Activity ID*, *Business Unit*, *Combination Code*, *Customer*, *Department, Job Code*, *Location Code*, *PC Business Unit, Performance Measurement Business Unit, Position Number , Product, Project/Grant, Resource Category , Resource SubCategory , Resource Type, Task Task Profile ID, User Field 1 – 4.*. From the Time Reporting Elements drop-down list, the values are: *Country, State, Locality, TRC, Billable Indicator.*

Note. By choosing a value from Task Data or Time Reporting Elements, the employee who is scheduled with this value, appears in the daily cell of Manage Schedules for that day. If there are changing elements throughout the day, there will be an icon representing any changing elements in the shift. This is an indicator to the user that they can drill down into the Schedule Daily Detail page for more information on the daily changes.

Note. In order for all of the schedule category icons and other options to be displayed to the user, the user must ensure that they save this page, in order to save the options.

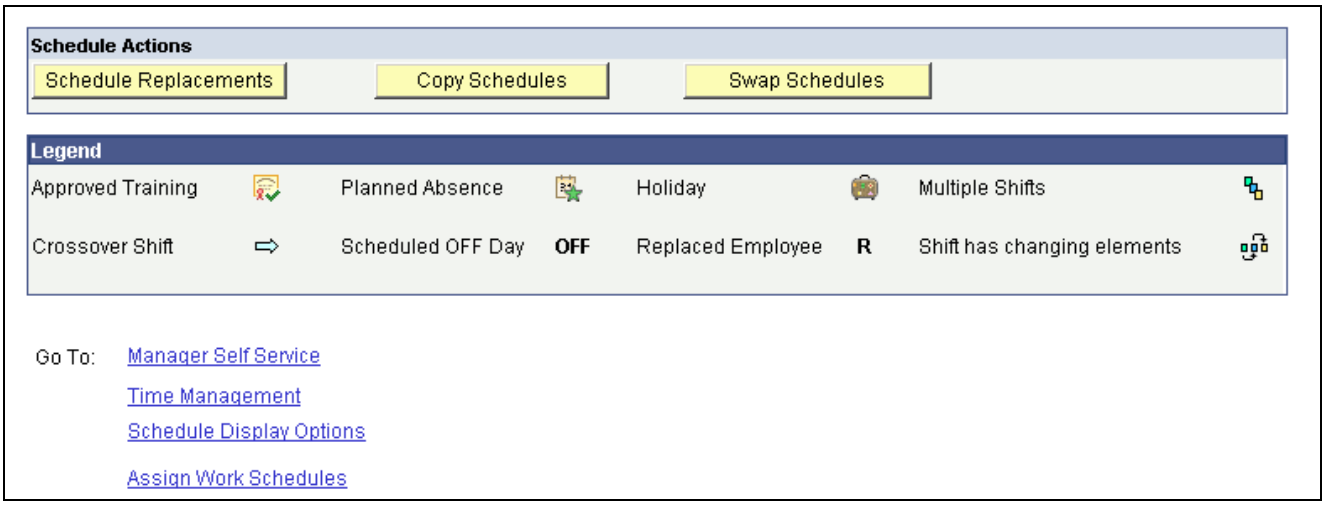
Managing Schedules

Access the Manage Schedules page.



Weekly Schedules page (1 of 2)

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Weekly Schedules page (2 of 2)

When entering the page, the system displays either the Daily, Weekly, or Date Range Schedules pages, depending on the default set on the Manage Schedules Display Options page. This page also sets defaults that are used on the Schedule Replacements, Copy Schedules, and Swap Schedules pages, such as date fields and link names.

Enter values in Employee Selection Criteria and click the Get Employees button to filter the list of employees that requires changes or review.

Click the Instructions expand section to view instructions about how to use the page.

View By Select *Day, Week,* or *Date Range* to view the listed employees and their schedules using this option you select.

Date Fields If *Day* is selected in the View By field, enter or click the Previous or Next Day links to change the Date value.

If *Week* is selected in the View By field, enter or click the Previous or Next Week links to change the Week Of value.

If *Date Range* is selected in the View By field, enter or click the Previous or Next Range links to change the Start Date, End Date, or both values. The maximum number of days a date range can span is 31.

Schedule Type Select the Schedule Type. Values are *Primary* or *Alternate.* If Global Payroll is not installed, the Schedule Type field is hidden and only primary schedules are shown.

Schedule Group This field lists the schedule groups. Once a schedule group is entered, and the Refresh button clicked, the grid redisplays the employees associated to that schedule group (as determined from their Assign Work Schedule page).

Coverage (only displayed on the Daily Schedule page) This field has values of *All*, *Scheduled* or *Unscheduled*. Select *All* to view all employees who are scheduled, not scheduled or who are scheduled as *Off*. Select *Scheduled* to view all employees who are scheduled for the day. Select *Unscheduled* to view all employees who either have no schedule or who are scheduled as *Off* for the day.

Refresh Click this button to refresh the page.

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Note. All of the filters and buttons on the Manage Schedules pages are controlled by the Refresh Schedules button at the top of the page. Only the View By field automatically refreshes the page.

Employee Grid

Click the employee name link to transfer to the Schedule Preferences page. View the schedule preferences of the employee before making any scheduling changes.

For punch employees, the scheduling information start time and end time are displayed on a bar. If there are multiple shifts, multiple shift icons appear and all start and end times appear on the bar. Click the Scheduled Hours link to open a new page and transfer to the Daily Detail page to override shift information.

Click the Schedule Hours link to transfer to the Daily Schedule page. Hover text is used to display the schedule hours for punch and elapsed employees.

For elapsed employees, schedule hours appear. In addition to the elapsed information, events such as Approved Training, Absence, and Holiday information appear in the Elapsed column as icons.

Training and absences data can be from different sources (Training - Training Administration, Enterprise Learning Management: Absence- Absence Management, Reported Time), and detailed scheduling information appears on Daily Schedule Details.

Total Schedule Hours for the day appear if the *Daily* value is specified for the View By field. If the Day is an Off day, no hours appear but the OFF text icon appears.

If there are multiple shifts for a day, only the first shift information appears. An icon denotes that there is a second shift. The second shift and the details of the second shift appear on the Daily Schedule Details page. If the shift crosses midnight, an icon denotes shift continuation.

On the Day View page, if an employee does not show up for a shift (known as a *no show*), the No Show icon appears.

If an employee is replacing another employee for a shift or number of shifts, the R (Replaced Employee) icon appears.

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Note. The system uses the following logic to determine whether or not an employee has a holiday.

First, the system checks to see if an employee has a holiday schedule specified on the Job Data record.

If there is no holiday schedule specified on the Job Data record for an employee, the system checks the Pay System Flag on the Job Data record for a value of *Global Payroll*. The system then derives the holiday schedule from GP pay group.

If the Pay System Flag has a value of *Payroll for North America* or *Payroll Interface* and Absence System is equal to *Absence Management*, the system will derive the holiday schedule from GP pay group.

If the Pay System Flag is equal to *Payroll for North America* or *Payroll Interface* and Absence System is equal to *Other*, then the system will derive the holiday schedule from the Payroll for North America pay group.

If there is no holiday schedule on the Payroll for North America pay group, the system derives the holiday schedule from the Time and Labor workgroup.

This logic is used for the Manager Calendar Views pages (Daily, Weekly, Monthly), the Manage Schedules pages for managers, and the Monthly Schedule page for employees.

Schedule Replacements Select one employee and click the Schedule Replacements button to find a replacement for this employee.

Copy Schedules Select an employee and click the Copy Schedules button to copy a schedule based on this employee's.

Swap Schedules Select two employees and click the Swap Schedules button to swap two employees' schedules.

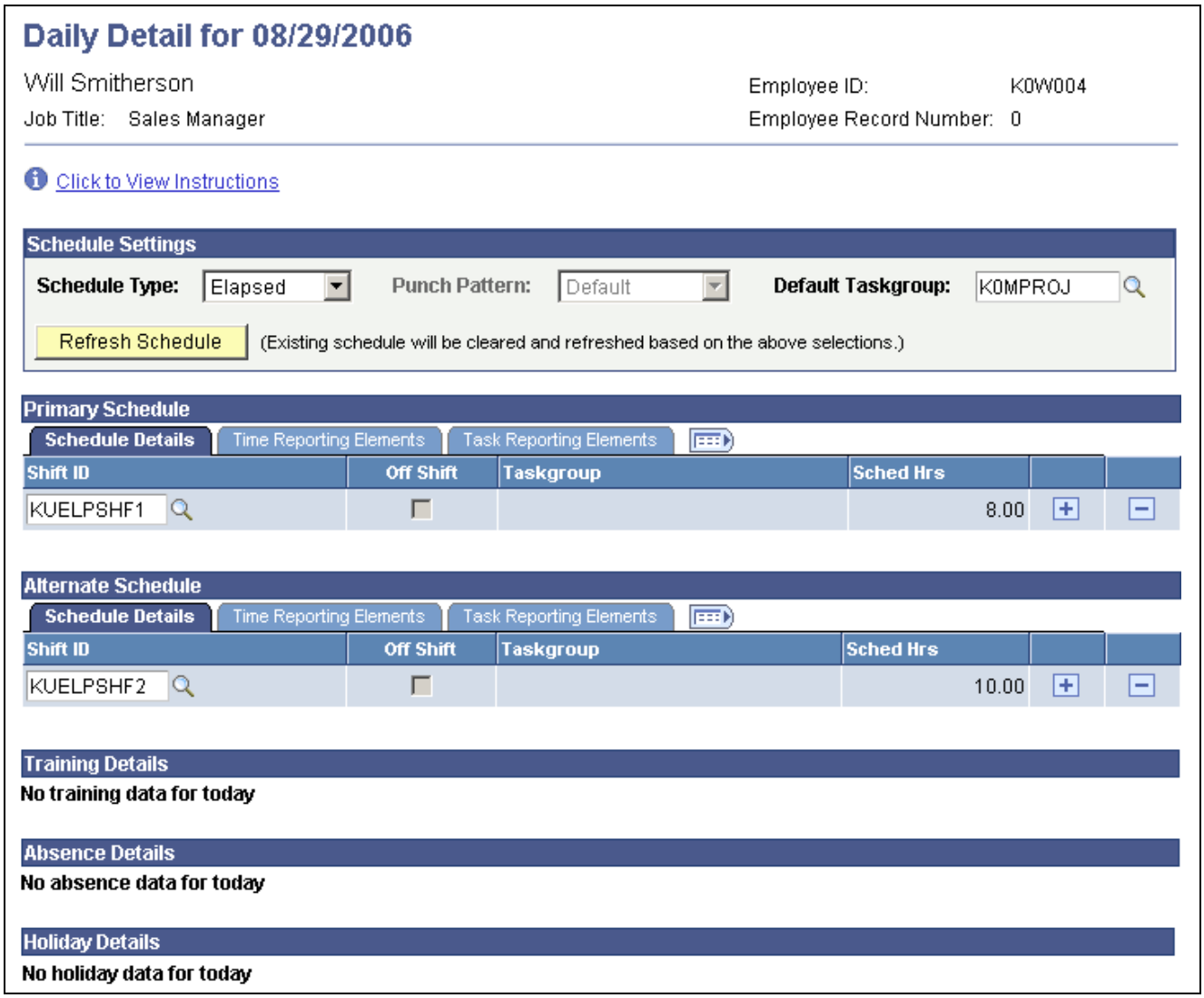
Legend The legend contains descriptions of the Manage Schedule icons. The icons default from the Manage Schedules Display Options page. In addition to the Schedule Categories, other icons displayed include Multiple Shifts, Scheduled OFF Day, Replaced Employee, Crossover Shift (for shifts that span midnight).

Note. The schedule actions of Schedule Replacements, Swap Schedules, Copy Schedules, and Override Schedules are audited.

Working with Daily Schedule Detail

Access the Daily Schedule Detail page.

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Daily Detail page

You can override a schedule on this page by refreshing or adding an existing schedule for the day, or you can create a new schedule for the day.

Schedule Type Options in this field are *Punch* and *Elapsed*.

Punch Pattern This field is available If you selected the *Punch* option in the Schedule Type field. Options for this field are *Default* and *All Punches*.

- *Default* displays punch types that are derived from the Default Punch Pattern on the Configurations tab of the Time and Labor Installation page, or on the Schedule Settings tab of the Global Payroll & Absence Management Installation Settings page.
- *All Punches* displays all available punch types (IN, BREAK, IN, MEAL, IN, BREAK, IN, TRANSFER, OUT) and provides more flexibility.

See Chapter 4, “Setting Up Basic Tables,” Setting Up System Defaults, page 27.

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Default Task Group Enter a value in this field to display *Time Reporting Elements* and *Task Elements* or *Task Profile* values.

Using a default taskgroup for the day is appropriate if you enter schedule changes without using a Shift ID. If making schedule overrides using a Shift ID, any taskgroup and task information from the Shift ID is derived and displayed in either the Primary Schedule or Alternate Schedule group boxes.

The selection of Schedule Type and Taskgroup will derive the time reporting template used to default the display of *Time Reporting Elements* and *Task Elements* or *Task Profile* values for that taskgroup. If you defined the time reporting template to use the task template, these tabs are displayed in the Primary Schedule and Alternate Schedule group boxes.

Note. The selection you enter in the Schedule Type and Taskgroup fields derive the time reporting template used to display *Time Reporting Elements* and *Task Elements* or *Task Profile* values for the taskgroup. If you defined the time reporting template to use the task template, these tabs are displayed in the Primary Schedule and Alternate Schedule group boxes, and may include Task Reporting Elements and Chartfields.

More Click this link to open the Daily Detail – Shift Information page.

Refresh Schedule Click this button after you change the Schedule Type Punch Pattern or Default Taskgroup values for the day. This resets the day to enter a new schedule override.

Note. Remember to save the page for the schedule change to be reflected in the Manage Schedules components.

Note. The Manage Schedules component recognizes the date and time formats selected by the user under My Personalizations.

Schedule Daily Detail and the Display of Shift ID

When you have set the appropriate SETID for an employee, the system displays the Shift ID field for that employee. The SETID is derived from the Schedule Group associated with the employee's predefined or default schedule assignment. The only time that a Shift ID field does not appear on the Daily Detail page is when:

- There is no row in Assign Work Schedule for the employee.
- There is no schedule ID defined on the employee's workgroup.

If the employee does not have a long term schedule, then the Shift ID field will not appear on the page. As a result, you need to enter the shift data manually for the day. Select the Refresh Schedule button to activate fields in the Primary Schedule and Alternate Schedule group boxes.

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Primary Schedule and Alternate Schedule

Any schedule information from a prior schedule change, or imported schedule information, or permanent work schedule is displayed in these group boxes. If no primary or alternate schedule detail exists for the day, it can be added using the Refresh Schedule button. You can enter a schedule override with a predefined shift which has the SetID of the employee's Schedule Group. You can also enter a schedule override that has only punch times or only scheduled hours for an elapsed schedule, without using shifts. If changing time reporting or task elements exist in a shift, the detail of the Shift can be accessed through a More link both on the Primary and Alternate Schedule sections. An icon representing Shift has Changing Elements appears for those shifts that have changing elements.

To enter an off shift, you can choose a predefined shift that has the Off Shift check box activated. If you are not using shifts, you can enter either elapsed hours with an Off Shift check box activated or an IN and OUT time with an Off Shift check box activated. The Off Shift check box determines that the Scheduled Hours are zero, it does not change the duration of the off shift.

Multiple shifts can be entered as a schedule override for a day. If you enter a punch shift that overrides the times of another punch shift for the day, you will receive a warning message.

The Alternate Schedule Detail tab is displayed only if core Global Payroll or Absence Management are installed and selected on the Installation Table – Products page.

Training Details

This group box displays training detail information from PeopleSoft Training Administration or Learning Management. The start time and end time of the training for the day are displayed.

Absence Details

This group box displays the duration of an absence from Global Payroll or Absence Management, or from leave reported directly on the Timesheet in Time and Labor or PeopleSoft Base Benefits.

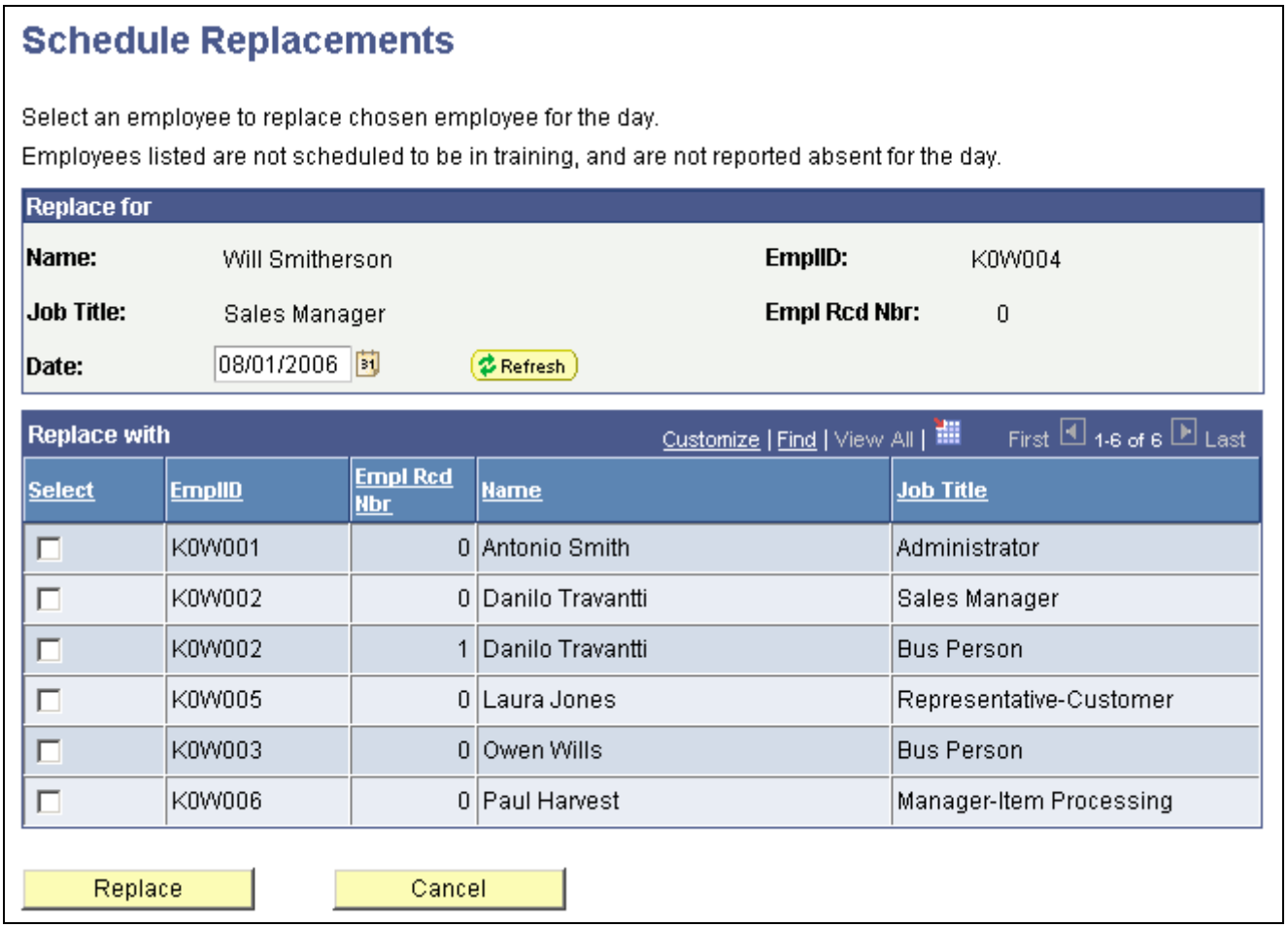
Holiday Details

This group box displays the name of the holiday and number of hours from the Holiday Schedule. If a holiday schedule exists for the employee on the Job Data page, it is displayed. If no holiday schedule exists on that page, the system checks if the employee is a Global Payroll employee and uses the holiday schedule from the Global Payroll pay group. If the employee is not enrolled in a Global Payroll pay group, but is enrolled in Time and Labor, the system uses the holiday schedule from the employee's Workgroup.

Scheduling Replacements

Access the Schedule Replacements page after selecting an employee from the Manage Schedule page.

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Schedule Replacements page

On the Schedule Replacements page, change the date if required and select one employee to substitute the schedule for the day. In most cases, the user would be finding a replacement for an employee who will be absent for the day. All the employees who are not in training for that time, and not absent for the day, appear in the Replace with grid.

After an employee is *Replaced*, an *R* is placed next to the employee in their daily cell, on any of the Manage Schedules pages - day, week or date range. The employee who is replacing the employee, inherits the schedule. The replaced employee retains the original schedule, so as to represent what the original schedule was, and for appropriate payment if the employee then reports an absence for the day.

If you decide that the replacement was a mistake, you can undo it by accessing the Daily Detail page from the Scheduled Hours link, and clicking the Undo Replacement button and then clicking the OK button on the Confirmation page. As a result, the *R* will no longer be displayed on the Manage Schedules page.

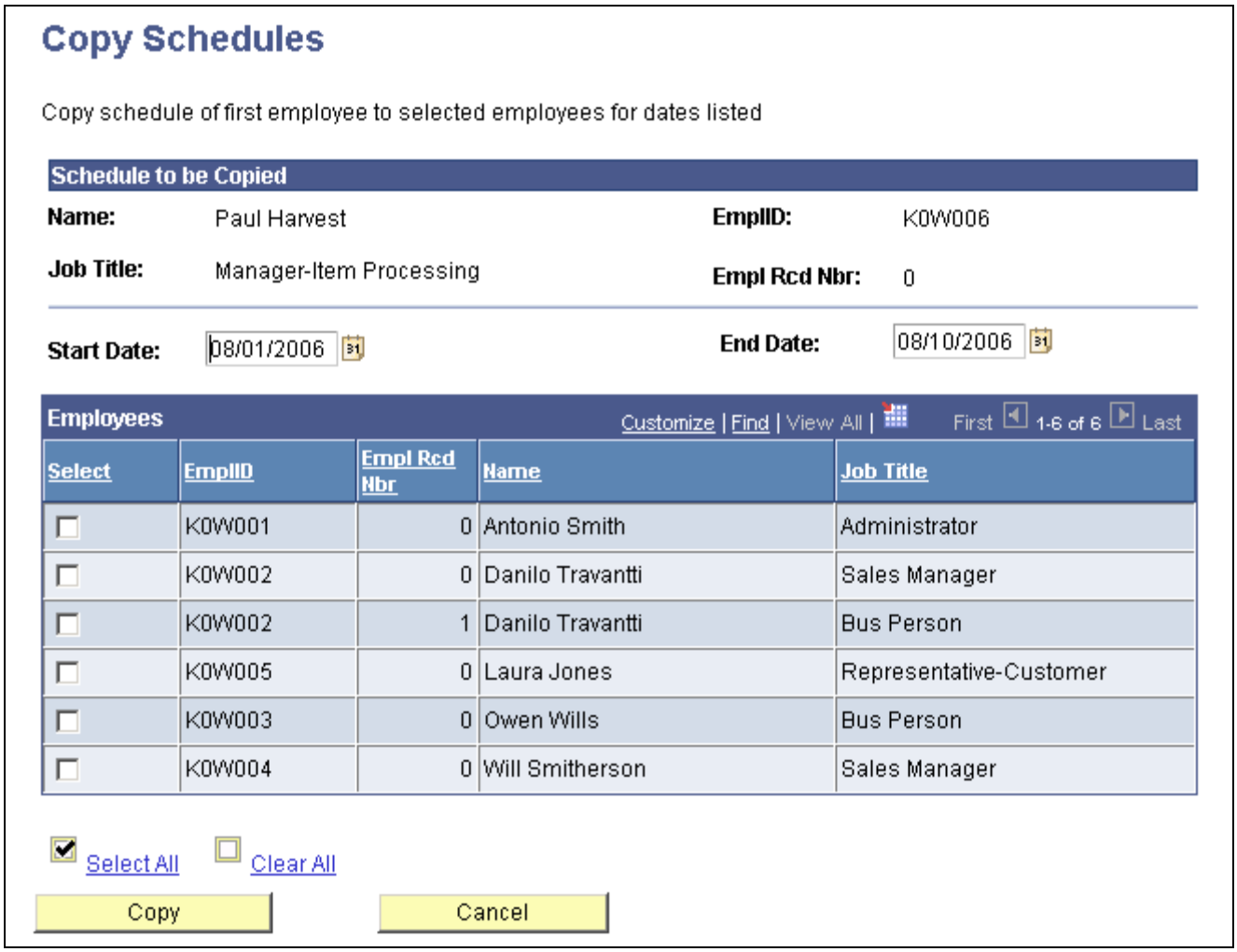
For the employee who had inherited the employee's schedule, the schedule for that day would need to be changed, if the employee is no longer replacing the employee's schedule for that day.

Note. If you selected the *Day* View By Option, the Date field on this page is display only.

Copying Schedules

Access the Copy Schedules page after selecting an employee from the Manage Schedule page.

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Copy Schedules page

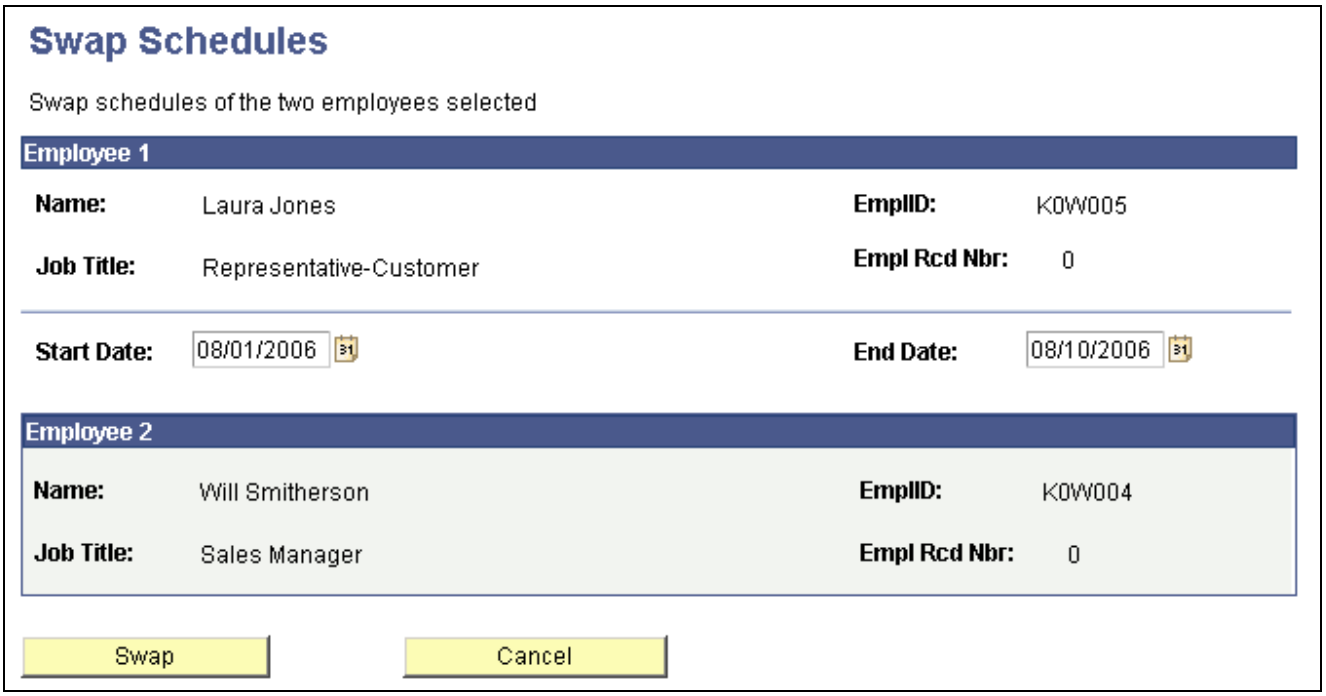
On the Copy Schedules page, change the Start Date and End Date if required. Select single or multiple employees to copy schedules and click the Copy button. The whole day will be copied for the date or range of dates defined. .

Note. If you selected the *Day* View By option, the Date field on this page is display only.

Swapping Schedules

Access the Swap Schedules page after selecting two employees to swap from the Manage Schedule page.

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Swap Schedules page

On the Swap Schedules page, change the Start Date and End Date if required and click the Swap button. Click the Cancel button to return to the Manage Schedule page and make another selection. The whole day's schedule will be swapped between the two employees, or all the days listed if it is a range of dates.

Note. If you selected the *Day* View By option, the Date field on this page is display only.

Integrating Training Data from Learning Management

This section discusses how to integrate Time and Labor with Learning Management.

Learning Management

To use the ELM training data for display in the Manage Schedules and Manager Calendar pages, and the Workforce Availability pagelet, these steps should be considered:

- The learners are enrolled in the Job data record in HCM and the personal information has been messaged from HCM to ELM.
- Activate the Scheduled Time Fullsync message in the HCM and ELM database.
- Ensure Scheduled Time FullSync is run first, to get all activities and sessions over to HCM before starting to use the Scheduled Time Sync message.
- The Scheduled Time Fullsync should only be run once for initial setup. If the Scheduled Time Fullsync is run more than once, no rows will be deleted from the SCH_EXT_DTL table first. Any rows that are duplicate rows will be inserted into the SCH_EXT_REJ table.
- Activate the Scheduled Time Sync message in the HCM and ELM Database.

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Note. When the Scheduled Time Fullsync message flows in from Enterprise Learning Management, it triggers the SCH_EXT_VALID Application Engine program in the HCM database. This program moves data from the SCH_EXT_STG table to the SCH_EXT_DTL table.

Note. The Enterprise Learning Management field on the Products page (Set Up HRMS, Install, Installation Table), needs to be checked, in order for the user to view ELM training data icons in Manage Schedules, Monthly Schedules and Calendars.

Scheduled Time Sync Message

The Scheduled Time Sync message in ELM is triggered by:

- Activity pages trigger a sync message. This includes session changes or additions, trainer changes, session date or time changes, dropping a learner from a session or adding a learner to a session.
- Enrollment modifications trigger a sync message. This includes the Manager Enrollment, Employee Enrollment and Administrator Enrollment components.

ELM Data Display

A training icon will appear on a day that an employee is enrolled in training for both the Manage Schedule and Monthly Schedule pages.

The training data that is displayed in the Schedule Daily Detail section of the Manage Schedules page includes:

- The catalog item of the activity (that is the Course Code Description).
- Session Start Date and Start Time per day (that is, if training spans more than one day, there would be multiple sessions).

ELM data is derived to count employees who are reported as training for the Manager Calendar Views and the Workforce Availability pagelet.

The SCH_EXT_DTL and AUDIT_SCH_TBL records are updated for every training data change triggered from the Scheduled Time Sync message.

See Also

PeopleSoft Enterprise Learning Management PeopleBook

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CHAPTER 23

Using Mobile Time Management

This chapter provides prerequisites and an overview of Mobile Time Management and discusses how to:

- Access Mobile Time Management.
- View, report, and update elapsed time entries.
- View schedules.
- Synchronize data.

See Also

Chapter 15, "Reporting Time," page 407

Prerequisites

Before using Mobile Time Management, Time and Labor application tables must be set up. PeopleSoft Mobile Agent must be installed and running on the host machine and the mobile device. The bootstrap synchronization does not need to be performed if the host machine is not also the mobile device.

Before using Mobile Time Management, PeopleSoft Mobile Agent must be installed on the mobile device and, if Mobile Time Management is used on a pocket PC, PeopleSoft Mobile Agent must also be installed on the host computer. For installation instructions on PeopleSoft Mobile Agent refer to the *Enterprise PeopleTools Installation Guide* posted on the PeopleSoft Customer Connection website.

The billable time functionality requires implementation of Project Costing. To record and track billable time, Time and Labor integrates with Project Costing.

See Also

Chapter 3, "Understanding Time and Labor," page 9

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Understanding Mobile Time Management

This section provides an overview of Mobile Time Management and discusses how to:

- Install PeopleSoft Mobile Agent.
- Initialize Mobile Time Management.

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See Also

Chapter 4, “Setting Up Basic Tables,” page 15

Chapter 6, “Establishing Time Reporting Codes,” page 101

Mobile Time Management

Mobile Time and Labor provides time reporting and viewing capabilities for Pocket PC and laptop computer users while disconnected from the organization’s network. This enables users to manage time reporting while working remotely and to submit reported time periodically through synchronization with the server.

Mobile Time Management enables users to report elapsed time-related data on mobile devices. Mobile Time Management runs on either a laptop computer or pocket PC. When disconnected from the network, users can still maintain time reporting data on the mobile device. Time reporter data is uploaded to the network server upon synchronization, and then the data passes to the application server, updating the time reporter data in the application.

You can report time through the mobile device and still use the Time and Labor online self-service transactions as well. If duplicate entries are made on the mobile device and through an online transaction, the entry performed on the device is processed as the default entry, and the system produces an error message upon the next synchronization. Corrections to previous period time reporting data must be performed online.

Mobile Time Management enables users to designate billable time for each time reporting transaction. This data passes to reported payable time in Time and Labor and then is passed onto Project Costing, if installed, or another third-party application. This allows for accurate time reporting for organizations and clients.

The Mobile Time Management table-loading implementation can be divided into four phases: fundamental tables, Time and Labor Tables, PeopleSoft Mobile Agent tables, and Mobile Time Management.

Important! The order in which you set up the tables that are required to implement Mobile Time Management may vary; each individual application isn’t necessarily set up in sequence. The order in which you complete setup may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn’t offer step-by-step guidance on how to perform an actual implementation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Enterprise PeopleTools Installation Guide

Installing PeopleSoft Mobile Agent

The steps discussed in this section provide an overview of the PeopleSoft Mobile Agent installation process. The reference documentation listed for each step provides further detail.

Step	Reference
1. Access the PeopleSoft Mobile Agent setup files and follow the steps in the PeopleSoft Mobile Agent InstallShield Wizard.	*Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent, Getting Started with PeopleSoft Mobile Agent*

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Step	Reference
2. Sign in to the PeopleSoft Mobile Portal and set the synchronization IDs.	*Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent, Using Synchronizable Component Interfaces, Using the Synchronization ID and DateTime Stamp*
3. Define mobile user roles and associate them with user IDs.	*Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent, Creating Mobile Pages, Creating Roles for Mobile Users and Associating Permission Lists to the Roles*

Initializing Mobile Time Management

The steps discussed in this section provide an overview of the Mobile Time Management initialization process. The information that you defined in your fundamental tables lays the foundation for this setup.

Note. The steps listed below as optional are required only when using a pocket PC.

1. Start the PeopleSoft Mobile Agent application.
2. On the Mobile Portal Bootstrap synchronization page that appears, synchronize the mobile device.
3. Synchronize the mobile device.
4. (Optional) If initializing a Pocket PC, make certain the device has a network connection to the host computer. Then repeat the step if the Mobile Agent has been stopped.
5. (Optional) Select PS Sync PDA from the Mobile Agent Menu.
6. (Optional) Log on to the Update PDA Applications page that automatically loads upon initial logon.
7. (Optional) Synchronize the mobile device.

Accessing Mobile Time Management

This section discusses how to:

- Access Mobile Time Management from a laptop.
- Access Mobile Time Management from a pocket PC.
- Navigate through Mobile Time Management.

Accessing Mobile Time Management From a Laptop

To access PeopleSoft Mobile Time Management from a laptop, select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent, PS Mobile Application.

When you first access PeopleSoft Mobile Agent and PeopleSoft Mobile Time Management, you see a page to perform an initial synchronization that copies your business applications to the mobile device. If your applications successfully load, a full synchronization is performed to load your business data onto your device.

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Accessing Mobile Time Management From a Pocket PC

To access PeopleSoft Mobile Time Management application on a pocket PC:

1. From the Start menu, select Programs.
2. Select the PeopleSoft folder.

   This folder contains the files to start and stop PeopleSoft Mobile Agent and the PeopleSoft Mobile Time Management application file.
3. Select Start PS Mobile Agent.

   This starts PeopleSoft Mobile Agent.
4. Select PS Mobile Application.

   This opens PeopleSoft Mobile Time Management.

When you first access PeopleSoft Mobile Agent and Mobile Time Management, you see a page to perform an initial synchronization that copies your business applications to the mobile device. If your applications successfully load, a full synchronization is performed to load your business data onto your device.

To perform the initial synchronization:

1. Make sure that you're on the Mobile Portal Bootstrap synchronization page, which should appear automatically.
2. Synchronize the mobile device.
3. Make certain that the device has a network connection to the host computer.

   Restart the application if PeopleSoft Mobile Agent has been stopped.
4. Select PS Sync PDA from the Mobile Agent menu.

   The Update PDA Applications page appears.
5. Synchronize the pocket PC.

Note. To improve viewing on the pocket PC screen, reduce the text size by selecting View, Text Size, Smaller (or Smallest).

Navigating Through Mobile Time Management

Mobile Time Management uses familiar PeopleSoft and web navigation methods, including a menu, links, and buttons.

The Menu link displays the main page, including the Mobile Time, Alerts and Synchronization links. The Menu link appears only on the pocket PC, not on the laptop. Each of these menus contain links to Mobile Time Management pages.

The Mobile Time Management menu contains links to the basic functions of the application, the Elapsed Time page and the View Schedule page. Click the Elapsed Time link to go to the Elapsed Time Summary page. This page displays the elapsed time entries for the current period. From this page, you can add new elapsed time entries by clicking the Add button or modify time entries by clicking the date link for that entry. Either link displays the Report Time page.

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Viewing, Reporting, and Updating Elapsed Time Entries

This section provides common elements and discusses how to report and update elapsed time.

Common Elements Used in This Section

Time Reporting Code — Enter a time reporting code (TRC), an element of compensation or a bucket of several elements in which the system collects labor data, hours, amounts, or units worked. Define these codes on the Time Reporting Codes components in Time and Labor. Click the column heading to sort by TRC.

Quantity — Enter the number of hours being reported for the designated date and TRC. Click the column heading to sort by quantity.

Currency — Select a currency code for this time report entry.

Billable — Select to charge the time expense to a project and trigger client billing. Project Costing must be implemented to use this feature.

Sync Status (synchronization status) — Use the Sync Status column to view the synchronization information on each entry. Click the heading to sort by synchronization status.

Use Saved Search, Date, Time Reporting Code, Quantity, Sync Status, (synchronization status), **Save Search Criteria,** and **Personalize Search** — Enter a name for this search and then enter search criteria. Click the Save Search Criteria link to name this search and save the criteria to use again.

Click the Personalize Search link to define search layout.

Note. Saved searches on the Elapsed Time Summary page do not appear on the View Schedule page. Separate criteria for saved searches must defined on each page.

The search feature on the pocket PC is identical to that on the laptop.

See Also

Chapter 6, "Establishing Time Reporting Codes," page 101

Pages Used to View and Report Elapsed Time

Page Name	Object Name	Navigation	Usage
Elapsed Time Summary	TL_MBLE_ELPTIME_MP	Mobile Time, Elapsed Time	View the reported elapsed time entries for the current period and any time reported on the mobile device that has not been submitted.
Report Time	TL_MBLE_ELPTIME_MP	• Mobile Time, Elapsed Time Click a date link. • Mobile Time, Elapsed Time Click the Add button.	Enter reported time.

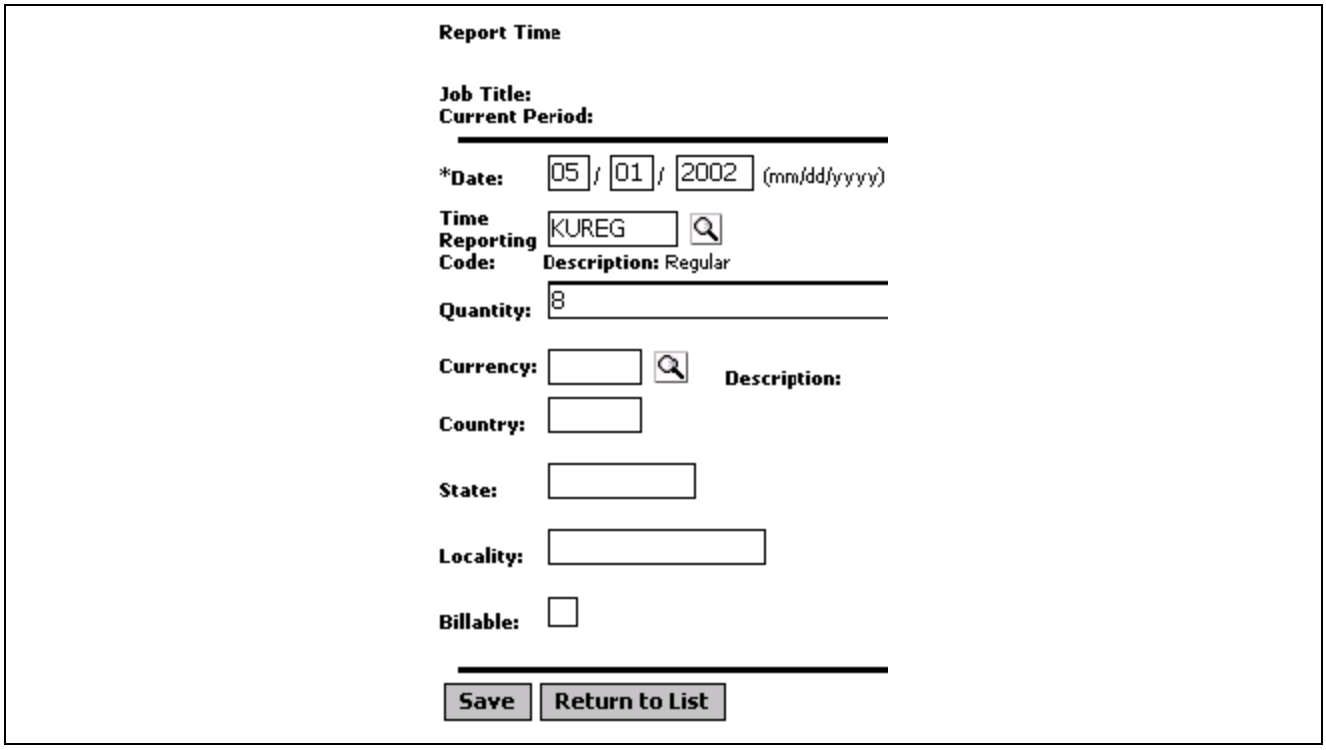
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Reporting and Updating Elapsed Time

Access the Report Time page.



Report Time page (laptop)



Report Time page (pda)

Date Enter the date for the reported time.

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Country, State, and **Locality** Enter the country, state and locality from where the time is being reported. You cannot report a locality without reporting a state; you cannot report a state without reporting a country.

Return to List Click to return to the Elapsed Time Summary page.

If time for one date is split between different TRCs or billable and non-billable time, enter a separate time report for each TRC or billable and non-billable hours. For example, if on July 15, 2002, you worked four regular, non-billable hours; four regular, billable hours; and three overtime hours, you would enter three separate time reports with the same date.

Reported time entries remain stored on the mobile device until the next server synchronization process uploads the entries to the server.

To update entries prior to synchronization, modify any fields and click Save.

Viewing Schedules

Use Mobile Time Management to view the current schedule period. Scheduling data updates with either the Full Synchronization or Update Application synchronization modes.

The schedule displays the current period as defined by the payroll definitions in Time and Labor. If a period is one week, the week containing the current date appears. If a period is one month, the month period containing the current date appears, with a maximum of 31 days.

Page Used to View Schedules

Page Name	Object Name	Navigation	Usage
View Schedule	TL_MBLE_SCHEDULE_MP	Mobile Time, View Schedule	View the current schedule period.

Synchronizing Data

This section provides an overview of mobile synchronization and discusses how to synchronize mobile application data.

Understanding Mobile Synchronization

Mobile applications store data updates on the mobile device until the mobile user initiates a data synchronization. The mobile user must gain a network connection to the synchronization server gateway machine prior to running the synchronization process. During the synchronization process, data from the device is uploaded to the server and any data conflicts between the device and server are resolved. In some cases, new and modified business data, application definitions, and error messages are downloaded from the server to the device.

Users choose from three synchronization modes. The following table describes each mode.

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Synchronization Mode	Description
Upload Changes	Sends new and modified reported time from the mobile device to the server. This is the fastest synchronization process. Only error messages download from the server.
Full Synchronization	Uploads changes and provides a complete reconciliation of the business data on the device with the data on the server. After uploading the changed data, the mobile device retrieves new and modified business data from the server.
Update Applications	Uploads new and modified reported time from the device to the server. If errors occur during the upload process, the process terminates, and the errors generated must be corrected before proceeding. If there are no errors with the reported time, the process removes all data from the device and downloads the current version of the application from the server. After successfully reloading the application, the system performs a full synchronization to restore business data to the device.

In addition to the three synchronization modes available from the Synchronization menu and described in the table below, the device automatically initiates the Bootstrap Synchronization mode upon initial logon to the application. The Bootstrap Synchronization loads your business applications if your device has never been initialized or if you have reinstalled PeopleSoft Mobile Agent and Mobile Time Management. If your applications successfully load, a Full Synchronization is performed to load your business data on to your device.

Note. When using a Pocket PC, the host machine used for data synchronization must be running PeopleSoft Mobile Agent.

Synchronizing Mobile Application Data

To synchronize Mobile Time Management data:

1. Select Synchronization from the Mobile Time Management main menu page.
2. Select the synchronization mode.

   Note. To expedite synchronization on the pocket PC, use the initialized host PC. Select Start, Programs, PeopleSoft Mobile Agent, PS Sync PDA. This synchronization method uses the host PC's processing power to perform the application synchronization and then synchronizes the results to the connected pocket PC. A synchronization performed directly from the pocket PC takes longer to process.

3. Enter your user ID and password.
4. Click the Synchronize button.

After each synchronization, you can view the results as well as error messages and notifications produced by the synchronization process.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

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APPENDIX A

Exceptions and Validations

This appendix lists Time and Labor exceptions and validations.

Understanding Exceptions and Validations

The following is a list of validations and exceptions, ordered by validation definition ID number. All of these validations can be configured to run in Submit Time and Time Administration. For validations on time reporting elements that are selected to be processed in Submit Time, you can choose not to run these during the Time Administration process to increase performance time.

Note. All exceptions listed in this table are delivered with a high severity level except TLX01700 and TLX01710, which are delivered with a low severity level. If you modify high severity exceptions by selecting the Allowable check box on the Exception Definition page, in some cases payable time is still not created, even though the exception is allowed on the Manage Exceptions page.

See Chapter 4, "Setting Up Basic Tables," Defining Exceptions, page 68 and Chapter 17, "Managing Time," Managing Exceptions, page 480.

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
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. Keep the Exception TLX00001 at 'high' severity. A low or medium severity exception can create payable time. However, if the time reporter is reporting a comp TRC that is not in his comp plan, this is still an exception. Although the system can create the payable time, it will not be able to update the comp time balance.	TLX00001	Invalid Comp Time TRC /Balance
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
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.	TLX00030	Inactive Time Reporter Status
4	TLX00040	Valid Taskgroup	Verify that the Taskgroup is in the TL_TASKGRP_TB as of the date reported.	TLX00040	Invalid Taskgroup
5	TLX00050	Active Taskgroup	Verify that the Taskgroup is 'Active' as of the date reported.	TLX00050	Inactive Taskgroup

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
6	TLX00060	Valid Task Profile ID	Verify that the Task Profile ID is in the TL_TSKPRF table as of the date reported.	TLX00060	Invalid Task Profile
7	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.	TLX00080	Task Profile not in Taskgroup
8	TLX00090	All/ None Reqd Task Elements	Verify that either all or none of the required task elements of the task template have been reported.	TLX00090	Task Values Required
9	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
10	TLX00110	ACCT_CD in TL_COMM_ ACCT_VW	Verify that the Combo Code reported exists in the TL_COMM_ ACCT_VW when the TASK_PROFILE_ID is not reported, the Combo Code is a required field on the task template.	TLX00110	Invalid Combo Code
11	TLX00120	BUSINESS_ UNIT is Reported	Verify that the BUSINESS_UNIT reported 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

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
12	TLX00130	BUSINESS_ UNIT_PC	Verify that BUSINESS_UNIT_PC is not reported when PS/Projects is not installed.	TLX00130	Invalid Value for Task Templt
13	TLX00131	BUSINESS_ UNIT_PC	Verify that the BUSINESS_UNIT_PC reported 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
14	TLX00132	BUSINESS_ UNIT_PC	Verify that the BUSINESS_UNIT_PC reported 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
15	TLX00141	BUSINESS_ UNIT_PF	Verify that the BUSINESS_UNIT_PF reported 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
16	TLX00150	COMPANY	Verify that the COMPANY reported exists in the COMPANY_TBL when TASK_ PROFILE_ID is not reported.	TLX00150	Invalid Company

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
17	TLX00160	LOCATION	Verify that the LOCATION reported exists in the TL_ LOCATION_VW when TASK_PROFILE_ID is not reported.	TLX00160	Invalid Location
18	TLX00170	JOBCODE	Verify that the JOBCODE reported exists in the TL_ JOBCODE_VW when TASK_PROFILE_ID is not reported.	TLX00170	Invalid Jobcode
19	TLX00180	POSITION_NBR	Verify that the POSITION_NBR reported exists in the POSITION_DATA table when TASK_ PROFILE_ID is not reported.	TLX00180	Invalid Position Number
20	TLX00190	CUSTOMER	Verify that the CUSTOMER reported exists in the TL_CUSTOMER table when TASK_ PROFILE_ID is not reported.	TLX00190	Invalid Customer
21	TLX00200	DEPTID	Verify that the DEPTID reported exists in the TL_DEPT_ TBL_VW when TASK_PROFILE_ID is not reported.	TLX00200	Invalid Department
22	TLX00211	PRODUCT	Verify that the PRODUCT reported 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

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
23	TLX00220	TASK	Verify that the TASK reported exists in the TL_TASK table when TASK_PROFILE_ID is not reported.	TLX00220	Invalid Task
24	TLX00230	ACTIVITY_ID	Verify that the ACTIVITY_ID reported exists in the TL_PROJ_ ACTV_VW when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX00230	Invalid Activity ID
25	TLX00231	ACTIVITY_ID	Verify that the ACTIVITY_ID reported 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
26	TLX00232	ACTIVITY_ID	Verify that the ACTIVITY_ID reported 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
27	TLX00240	RESOURCE_ TYPE	Verify that RESOURCE_TYPE is not reported when PS/Projects is not installed.	TLX00240	Invalid Value for Task Templt

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
28	TLX00241	RESOURCE_ TYPE	Verify that the RESOURCE_TYPE reported exists in TL_ PROJ_RTYPE_V when TASK_PROFILE_ID is not reported and PS/Projects is installed.	TLX00241	Invalid Resource Type
29	TLX00251	PROJECT_ID	Verify that the PROJECT_ID reported 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
30	TLX00254	PROJECT_ID	Verify that the PROJECT_ID reported 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
31	TLX00260	RESOURCE_ CATEGORY	Verify that RESOURCE_ CATEGORY is not reported when TASK_PROFILE_ID is not reported and PS/Projects is not installed.	TLX00260	Invalid Value for Task Templt

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
32	TLX00261	RESOURCE_ CATEGORY	Verify that the RESOURCE_ CATEGORY reported 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
33	TLX00262	RESOURCE_ CATEGORY	Verify that the RESOURCE_ CATEGORY reported 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
34	TLX00270	RESOURCE_ SUB_CAT	Verify that RESOURCE_ SUB_CAT is not reported when TASK_PROFILE_ID is not reported and PS/Projects is not installed.	TLX00270	Invalid Value for Task Templt

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
35	TLX00280	RESOURCE_ SUB_CAT	Verify that the RESOURCE_SUB_ CAT reported 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
36	TLX00281	RESOURCE_ SUB_CAT	Verify that the RESOURCE_ SUB_CAT reported 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
37	TLX00300	ACTIVITY_ID	Verify that ACTIVITY_ID is reported when TASK_PROFILE_ID is not reported, PS/Projects is not installed and PS/EPM is installed.	TLX00300	Required Value for Task Templt
38	TLX00310	Bus Unit Rptd/Other Flds Req	Verify that BUSINESS_UNIT is reported 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

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
39	TLX00320	BUSINESS_ UNIT_PC	Verify that BUSINESS_UNIT_PC is reported 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
40	TLX00330	BUSINESS_ UNIT_PF	Verify that BUSINESS_UNIT_PF is not reported 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
41	TLX00340	BUSINESS_ UNIT_PF	Verify that BUSINESS_UNIT_PF is reported 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
42	TLX00350	POSITION_NBR	Verify that POSITION_NBR is not reported when POSITION_MGMT on INSTALLATION table is 'N'.	TLX00350	Invalid Value for Task Templt

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
43	TLX00360	PROJECT_ID	Verify that PROJECT_ ID is reported 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
44	TLX00361	PROJECT_ID	Verify that PROJECT_ ID is not reported 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
45	TLX00362	PROJECT_ID	Verify that PROJECT_ ID is reported 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
46	TLX00370	RESOURCE_ CATEGORY	Verify that RESOURCE_ CATEGORY is not reported when PS/Projects is installed but PROJECT is not available on the task template.	TLX00370	Invalid Value for Task Templt

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
47	TLX00380	RESOURCE_ SUB_CAT	Verify that RESOURCE_SUB_ CAT is not reported when PS/Projects is installed and PROJECT is not available on task template.	TLX00380	Invalid Value for Task Templt
48	TLX00390	RESOURCE_ TYPE	Verify that RESOURCE_TYPE is not reported when PS/Projects is installed and PROJECT is not available on the task template.	TLX00390	Invalid Value for Task Templt
49	TLX00400	No Tsk Elmnts with Tsk Prof	Verify that no individual Task Elements are reported when TASK_PROFILE_ID is reported.	TLX00400	Invalid entry of Task Elements
50	TLX00410	BUS_UNIT_PC vs BUS_UNIT_ PF	Verify that both BUSINESS_UNIT_PC and BUSINESS_ UNIT_PF are not reported at the same time.	TLX00410	Invalid Values for Task Templt
51	TLX00420	Valid TRC	Verify that the reported TRC exists in the TL_TRC_TBL.	TLX00420	Invalid TRC
52	TLX00430	Active TRC	Verify that the TRC is ‘Active’ as of the date reported.	TLX00430	Inactive TRC
53	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

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
54	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
55	TLX00480	COMP_RATECD	Verify that the COMP_RATECD reported is neither of 'Percent' type nor of 'Points' type.	TLX00480	Invalid Comp Rate Code Type
56	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
57	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
58	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
59	TLX00520	COMP_RATECD & TRC Reported	Verify that a TRC is reported when a COMP_RATECD is reported.	TLX00520	TRC needed for Comp Rate Code
60	TLX00530	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is a valid COMP_RATECD.	TLX00530	Invalid Comp Rate Code

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
61	TLX00540	COMP_RATECD	Verify that if a COMP_RATECD is reported, it is 'Active' as of the date reported.	TLX00540	Inactive Comp Rate Code
62	TLX00560	BILLABLE_IND	Verify that BILLABLE_IND reported in Elapsed Time has the value of either 'Y' or 'N'.	TLX00560	Invalid Billable Indicator
63	TLX00570	COUNTRY	Verify that the COUNTRY reported in Elapsed Time is in the COUNTRY_TBL.	TLX00570	Invalid Country
64	TLX00590	CURRENCY_CD	Verify that the CURRENCY_CD reported in Elapsed Time is in the CURRENCY_CD_ TBL.	TLX00590	Invalid Currency Code
65	TLX00600	LOCALITY	Verify that the LOCALITY reported in Elapsed Time is in the LOCAL_TAX_TBL.	TLX00600	Invalid Locality
66	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
67	TLX00640	RULE_ ELEMENT_1	Verify that the RULE_ELEMENT_1 reported is in the TL_ RULE_ELEMENT1 table.	TLX00640	Invalid Rule Element 1
68	TLX00650	RULE_ ELEMENT_2	Verify that the RULE_ELEMENT_2 reported is in the TL_ RULE_ELEMENT2 table.	TLX00650	Invalid Rule Element 2

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
69	TLX00660	RULE_ ELEMENT_3	Verify that the RULE_ELEMENT_3 reported is in the TL_ RULE_ELEMENT3 table.	TLX00660	Invalid Rule Element 3
70	TLX00670	RULE_ ELEMENT_4	Verify that the RULE_ELEMENT_4 reported is in the TL_ RULE_ELEMENT4 table.	TLX00670	Invalid Rule Element 4
71	TLX00680	RULE_ ELEMENT_5	Verify that the RULE_ELEMENT_5 reported is in the TL_ RULE_ELEMENT5 table.	TLX00680	Invalid Rule Element 5
72	TLX00740	STATE	Verify that the STATE reported is in the STATE_NAMES_ TBL.	TLX00740	Invalid State
73	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
74	TLX00840	USER_FIELD_1	Validate that the USER_FIELD_1 reported exists on the TL_USER_FIELD_1 table.	TLX00840	Invalid User Field 1
75	TLX00850	USER_FIELD_2	Validate that the USER_FIELD_2 reported exists on the TL_USER_FIELD_2 table.	TLX00850	Invalid User Field 2

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
76	TLX00860	USER_FIELD_3	Validate that the USER_FIELD_3 reported exists on the TL_USER_FIELD_3 table.	TLX00860	Invalid User Field 3
77	TLX00870	USER_FIELD_4	Validate that the USER_FIELD_4 reported exists on the TL_USER_FIELD_4 table.	TLX00870	Invalid User Field 4
78	TLX00880	USER_FIELD_5	Validate that the USER_FIELD_5 reported exists on the TL_USER_FIELD_5 table.	TLX00880	Invalid User Field 5
79	TLX01540	More than 24 hours reported	More than 24 hours cannot be reported for an Hours type TRC.	TLX01540	More than 24 hours reported
80	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
81	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
82	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

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
83	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
84	TLX01590	Cannot report Override rate	Validate that OVERRIDE_RATE is not reported along with an Amount type TRC.	TLX01590	Cannot report Override Rate
85	TLX01600	Invalid Time Reporter	The reported time is earlier than the Time and Labor enrollment date.	TLX01600	Invalid Time Reporter
86	TLX01620	PC BU, Proj Rptd/Other Flds Re	Validate that PC Business Unit, Project ID and Activity are required in combination if any are reported and Project Costing is installed.	TLX01620	PC BU, Proj Rptd/Other Flds Re
87	TLX01630	Comp Rate Code Validation	The Comp Rate Code reported has a rate type equal to points and is not valid.	TLX01630	Invalid Comp Rate Code
88	TLX01640	Reported Rules only TRC	The reported TRC is not valid for time entry. The TRC used is valid for Rules generated time only.	TLX01640	Invalid TRC
89	TLX01650	TRC not valid for Punch Time	The TRC reported is not a hours type TRC. Only a hours type TRC can be used to report punch time.	TLX01650	TRC not valid for Punch Time

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
90	TLX01660	TRC Assoc with comp/leave	The TRC reported is associated with compensation / leave indicator and is invalid to use for reporting punch time.	TLX01660	TRC assoc with comp /leave
91	TLX01670	HR BU not mapped to a GL BU	The reported HR Business unit is not mapped to a GL Business Unit.	TLX01670	HR BU not mapped to GL BU
92	TLX01680	Project not valid with Combo Cd	Project ID reported is not valid with the reported combo code.	TLX01680	Project is not valid with Comb
93	TLX01690	Reported Absence TRC	Warns the user that absence event information can only be reported in Absence module.	TLX01690	The reported TRC is not valid for time entry. The TRC used is valid for Absence generated time only.
94	TLX01700	Full Absence & Reported Time	When Full day absence exists and there is a reported time.	TLX01700	Time is reported for Full day Absence.?
95	TLX01710	Partial Absence & Punch Time	Triggers only if punch time of SCH source exists for the days of partial absence and the Workgroup is configured to Create Partial Work Hours. This is to warn the user that regeneration of reported time did not adjust the punch scheduled time.	TLX01710	Partial absence reported and also Reported Partial Punch Time.
96	TLX01770	Reported time in prior period	Validate if time reporter has reported time in prior period	TLX01770	Reported time in prior period

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Nbr	Validation Definition ID	Validation Definition	Validation Comments	Exception Definition ID	Exception Descr.
97	TLX01780	Reported time in future period	Validate if time reporter has reported time in future period	TLX01780	Reported time in future period
98	TLX01790	Reported time in prior year	Validate if time reporter has reported time in prior year.	TLX01790	Reported time in prior year

Timesheets and Online Validations

Online validations occur when you report time using Timesheets, either Elapsed or Punch, and click the Save for Later button or the Submit button. Validation occurs as of the Begin Date of the time period that is being viewed (day, week, or time period). These validations depend on the settings in the Validations Options group box on the T/L Installation page.

This section discusses these validations on the Weekly Elapsed Timesheet:

- Comp rate code validations.
- TRC minimum quantity and maximum quantity validations.
- Comp time validations.
- Leave time validation.
- Additional edits.

Comp Rate Code Validations

The validations for comp rate codes are:

- If no TRC is reported with a comp rate code, an error message is issued.
- If the comp rate code type is *Hourly* or *Flat Amount*, no override rate is allowed.
- The reported comp rate code type must be *Hourly*, *Flat Amount + Hourly*, *Flat Amount*, or *Percent*; otherwise, the comp rate code is not allowed.
- If the TRC type is *Hourly* and NA Earnings Payment type is *Both Hours and Amounts OK*, the comp rate code cannot be reported.
- If the TRC type is *Hourly* and the NA Earnings Payment type is *Either Hours or Amount OK*, the reported comp rate code type must be *Hourly*, *Hourly + Flat Amount*, or *Percent*; otherwise, the comp rate code cannot be reported.
- If the TRC type is *Amount* and comp rate code type is *Flat Amount*, then the TL quantity must be zero.
- If the TRC type is *Amount*, the NA Earnings Payment type is *Flat Amount* and the comp rate code type is not *Flat Amount*, the comp rate code is not allowed.
- If the TRC type is *Amount*, the NA Earnings Payment type is *Both Hours and Amounts OK* and the comp rate code type is *Flat Amount*, the TL quantity reported must be zero.

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- If the TRC type is *Amount*, the NA Earnings Payment type is *Both Hours and Amounts OK*, and the comp rate code type is not *Flat Amount*, an error message is generated to indicate that the comp rate code type is not *Flat Amount*.
- If the TRC type is *Amount*, the NA Earnings Payment type is *Either Hours or Amounts OK*, and the comp rate code type is *Flat Amount*, the TL quantity reported must be zero.
- If TRC type is *Amount*, the NA Earnings Payment type is *Either Hours or Amounts OK*, and comp rate code type is not *Flat Amount*, an error message is generated to indicate that the comp rate code type is not *Flat Amount*.
- If the TRC type is *Unit* and NA Earnings Payment type is *Both Hours and Amounts OK*, an error message is generated to indicate that the comp rate code cannot be reported
- If the TRC type is *Unit*, the NA Earnings Payment type is *Either Hours or Amounts OK*, and the comp rate code type is *Flat Amount*, then the TL quantity must be zero.
- If the TRC type is *Unit*and the NA Earnings Payment type is *Hours*, then the comp rate code type must be *Hourly*, *Flat Amount + Hourly* or *Percent*; otherwise, an error message is generated.
- If the TRC type is *Unit* and the NA Earnings Payment type is *Units*, the comp rate code is not allowed.

See Chapter 6, "Establishing Time Reporting Codes," Pages Used to Define and Map Time Reporting Codes, page 106.

TRC Minimum Quantity and Maximum Quantity Validations

If the quantity reported is not between the minimum and maximum defined on the TRC1 page, an error message is generated.

Comp Time Validations

The validations for comp time are:

- If online validation for comp time is selected on the TL Installation page and a comp time TRC is reported, the system validates that the employee participates in a comp time plan; if not, an error message is generated.
- If the comp time earned is greater than the comp time taken and the comp balance exceeds the maximum defined, an error message is generated to indicate that the time reporter has exceeded the *Max Positive Allowed* valued defined for the comp plan.
- If the amount of comp time taken is more than the amount of comp time earned, and it exceeds the negative balance allowed for the given comp plan, an error message is generated to indicate that the time reporter can't take more than the maximum negative hours allowed.
- If comp time taken is more than the comp time earned, and the comp time plan does not allow a negative balance, an error message is generated to indicate that the time reporter can't have negative hours with this comp plan.

Leave Time Validations

The validations for leave time are:

- If the TRC is not correctly mapped to a NA Earnings leave code, a warning message is issued that leave validation cannot occur.
- If the employee is not participating in a leave plan and reports a leave TRC, an error message is generated to indicate that the employee is not participating in a leave plan
- If an employee is not participating in a leave plan of the type to which the TRC is mapped, an error message is generated to indicate that the employee is not participating in a leave plan of leave plan type "x."

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- If the user reports more leave than the leave plan allows for a negative balance, a warning message is generated that indicates the number of hours reported which exceed the negative balance.

Additional Edits

Additional validation edits are:

- If setup changes exist for the employee during the displayed week, the days that are impacted by the effective dated change are disabled.
- The days in time reporting grid are disabled when prior period access is not allowed or is limited
- Any days that are populated by absence entries from Global Payroll and Absence Management are disabled.

Weekly Punch Time Reporting Validations

These types of punch time reporting validations are discussed in this section:

- Prior period access.
- Mid-period data changes
- Minimal data requirements.

Prior Period Access

The prior period access validations are:

- If prior period access is not allowed, generate this error message: New punch entries with a date value of “x” or before are not allowed.
- If punch entry is made prior to the current week, generate this error message: New punch entries with a date value before “x” are not allowed for this session.
- If punch entry is made after the current week, generate this error message: New punch entries with a date value after “x” are not allowed for this session.

Mid-Period Data Changes

If effective dated changes exist on the Maintain Time Reporter Data page that fall within the current week, generate this error message: New punch entries with a date value on or after “x” are not allowed for this session.

Minimal Data Requirements

Validate that punch time is entered; if not, generate an error message indicating that time is required.

Validate that punch date is entered; if not, generate an error message indicating that date is required.

Time and Task Reporting Template Validations

These validations apply to both elapsed and punch reported time:

- If the time reporter is a task template reporter, and if any task elements that are defined as required are missing, the reported elements are validated and an error message is displayed. Task elements include

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Company, *Business Unit HR*, *Location*, *Department*, *Job Code*, *Position Number*, *Product*, *Customer*, *Task*, *Account Code*, *PC Business Unit*, *Business Unit PF*, *Project ID*, *Activity*, *Resource Type*, *Resource Category*, *Resource Subcategory*, and *User Field 1* through `*User Field 5*.

- If time reporting elements that are defined as required are missing, the reported elements are validated and an error message is displayed. Time reporting elements include *Time Reporting Code*, *TRC Type*, *Unit of Measure*, *Currency Code*, *Time Collection Device ID*, *Country*, *State*, *Locality*, *Billable Indicator*, *Badge ID*, *Comp Rate Code*, *Override Rate*, *Override Reason*, *Rule Element 1* through *Rule Element 5*.

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APPENDIX B

TCD Interface

This appendix provides an overview of the Time Collection Device (TCD) reporting feature in Time and Labor and discusses:

- Input data sent to TCD systems.
- Output data produced by TCD systems.
- Objects received by the TCD.
- Objects sent from the TCD.
- Configuration of the Integration Broker and the TCD server.
- Error handling and resolution.
- Frequently asked questions

Understanding the TCD Interface

This section discusses the interface process between 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 Integration Broker to send and receive data from the TCD system. Data in 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 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 Integration Broker service operation.
   - 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 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.

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Note. To research the technical details of any integration point (EIP) used by PeopleSoft applications, refer to the Interactive Services Repository in the Implementation Guide section of Customer Connection.

Input Data Sent to TCD Systems

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 allows 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.

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	Length	Source	Notes
1	Empl ID	Char	11	TL_EMPL_ DATA	Identifier.
2	Empl RCD#	Num	3	TL_EMPL_ DATA	Identifier used in PS applications to accommodate multiple concurrent jobs (positions).
3	Badge ID	Char	20	BADGE_TABLE	Identifier.
4	Time Reporting Status	Char	1	TL_EMPL_ DATA	Active or Inactive.
5	Last Name	Char	30	PERSONAL_ DATA	Last name.
6	First Name	Char	30	PERSONAL_ DATA	First name.
7	Hire Date	Date	10	EMPLOYMENT	Needed for calculating anniversary date.

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#	Data Element	Type	Length	Source	Notes
8	Service Date	Date	10	EMPLOYMENT	Needed for determining seniority.
9	Birth Date	Date	10	PERSONAL_ DATA	Needed for displaying a 'Happy Birthday' message.
10	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.
11	Task Template ID	Char	10	TL_TASKGRP_ TBL	Identifies the employee's task template ID.
12	Task Profile ID	Char	10	TL_EMPL_ DATA	Identifies the employee's task profile.

With a few exceptions, 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 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.

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 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. Time and Labor does not send schedules or restriction profiles if the TCD cannot accommodate them.

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#	Data Element	Type	Length	Source	Notes
1	Badge ID	Char	20	TL_ SCHEDULE	Identifier.
2	Emplid	Char	11	TL_EMPL_ DATA	Identifier.
3	Empl Rcd#	Num	3	TL_EMPL_ DATA	Identifier.
4	Punch Date Time	DateTime	See Interface Specifications (Appendix F)	TL_ SCHEDULE	Identifier.
5	Sequence Number	Num	3	TL_ SCHEDULE	Identifier – needed when schedule spans multiple days.
6	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 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. Time and Labor does not send schedules or restriction profiles if the TCD cannot process them.

#	Data Element	Type	Length	Source	Notes
1	Restriction Profile ID	Char	10	TL_ RESTRCTN_ TBL	Identifier.
2	Early In Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.

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#	Data Element	Type	Length	Source	Notes
3	Early In Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
4	Late In Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
5	Late In Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
6	Early Out Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
7	Early Out Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
8	Late Out Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
9	Late Out Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
10	Early Meal Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
11	Early Meal Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
12	Late Meal Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
13	Late Meal Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.

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#	Data Element	Type	Length	Source	Notes
14	Early Break Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
15	Early Break Margin	Num	4	TL_ RESTRCTN_ TBL	Minutes.
16	Late Break Restriction Ind	Char	1	TL_ RESTRCTN_ TBL	Y/N.
17	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	Length	Source	Notes
1	Badge ID	Char	20	BADGE_ TABLE	Identifier.
2	Empl ID	Char	11	TL_EMPL_ DATA	Identifier.
3	Empl RCD#	Num	3	TL_EMPL_ DATA	Identifier.
4	Time Reporting Code	Char	5	TL_ PAYABLE_ TIME	Identifier.
5	Total Payable Hours	Num	12.6	TL_ PAYABLE_ TIME	Number.

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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	Length	Source	Notes
1	TCD ID	Char	10	TL_TCD_TBL	Identifies which clock gets this information.
2	Time Reporting Code	Char	5	TL_TRC_TBL	Identifier.
3	Description	Char	30	TL_TRC_TBL	Description.
4	TRC Type	Char	1	TL_TRC_TBL	Amount, Hours, or Units
5	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	Length	Source	Notes
1	TCD ID	Char	10	TL_ TCDGPTCD_ TBL	Identifies which clock gets this information.

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#	Data Element	Type	Length	Source	Notes
2	Supervisor ID	Char	11	TL_TCD_ SUPERV	Identifier.
3	Badge ID	Char	20	BADGE_ TABLE	Identifier.
4	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 Time and Labor. The system requires Task Profiles for positive task profile reporting. Positive task profile reporting in 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 Time and Labor for these time reporters. Cost allocation data defined on the default Task Profile in Time and Labor is used to allocate costs accordingly.

#	Data Element	Type	Length	Source	Notes
1	TCD ID	Char	10	TL_TCD_ TASKGRP	Identifier.
2	Task Profile ID	Char	10	TL_ TASKGRP_ TBL	Identifier.
3	Task Profile Description	Char	30	TL_TSKPRF_ TBL	Identifier.

The TCD Task Profile table is derived from the following 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. Time and Labor selects only records with SEND_TO_TCD = *Y.*

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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	Length	Source	Notes
1	TCD ID	Char	10	TL_TCD_ TASKGRP _TBL	Identifier.
2	Task Template ID	Char	10	TL_ TASKGRP_ TBL	Identifier.
3	Task Template Description	Char	30	TL_TSKPRF_ TMPLT	Identifier.

The TCD Task Template table is derived from the following 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	Length	Source	Notes
1	Task Template ID	Char	10	TL_TSKPRF_ TMPLT	Identifier.

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#	Data Element	Type	Length	Source	Notes
2	Task Element Code	Char	3	TL_TSKPRF_ TMPLT	Identifier.
3	Task Element Description	Char	30	TL_ TASKELE_ TBL	Description.
4	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 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, 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 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	Length	Source	Notes
1	Task Element Code	Char	3	TL_TASK_ ELE_TBL	Identifier.
2	Task Element Value	Char	25	A Prompt Table	Description.
3	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 Time and Labor tables:

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- 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. 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	Length	Source	Notes
1	Country Code	Char	3	TL_ COUNTRY_ VW	Identifier.
2	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	Length	Source	Notes
1	State Code	Char	6	TL_STATE_ VW	Identifier.
2	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.

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#	Data Element	Type	Length	Source	Notes
1	Locality ID	Char	10	LOCAL_TAX_ TBL	Identifier.
2	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	Length	Source	Notes
1	Rate Code	Char	6	COMP_RT_ REG_VW	Identifier.
2	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	Length	Source	Notes
1	Currency Code	Char	3	CURRENCY_ CD_TBL	Identifier.
2	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.

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#	Data Element	Type	Length	Source	Notes
1	Override Reason Code	Char	5	TL_OVRD_ RSN_TBL	Identifier.
2	Descr	Char	30	TL_OVRD_ RSN_TBL	Description.

Output Data Produced by TCD Systems

The TCD system produces the following output data to be passed to 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).

Time and Labor receives this data through PeopleSoft Integration Broker.

The first step is to validate the information sent by the TCD. This includes standard format edits. This data may also come into 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, 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.

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#	Data Element	Type	Length	Required	Notes
1	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
2	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
3	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
4	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*.
5	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*.
6	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*.
7	TCD ID	Char	10	Y	Indicates which TCD time transaction came from.

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#	Data Element	Type	Length	Required	Notes
8	Time Zone	Char	9	N	EST, PST, MST, and so on (see end of Appendix E for complete list of valid values)
9	Supervisor ID	Char	20	N	Can be blank − Supervisor ID who did the override.
10	User ID	Char	8	N	Can be blank − User ID who did the override.
11	Override Reason Code	Char	5	N	Can be blank − Reason code for the override.
12	Add/Delete Indicator	Char	1	N	Can be blank − A = Add, D = Delete
13	Action Date /Time	DateTime	See Interface Specifications in Using Time Collection Devices	N	Can be blank − Date and Time when override occurred.
14	Task Profile ID	Char	10	N	Can be blank − override or positively reported.
15	Task Template ID	Char	10	N	Can be blank − Task Template used when positively reported.
16	Country	Char	3	N	Override Country
17	State	Char	6	N	Override State

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#	Data Element	Type	Length	Required	Notes
18	Locality	Char	10	N	Override Locality
19	Comments	Char	254	N	

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. Time and Labor translates Badge IDs to EmplIDs.

Note. If the correctEmpl Rcd # is not set up for a clock badge type on the Badge page in Workforce Administration for an employee, the Time and Labor TCD Integration assigns all time to Empl Rcd = 0 when it processes messages converting Badge to Emplid/Empl Rcd.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Recording Badge Numbers.

Time and Labor obtains the time zone from the TCD definition if the time zone does not come in on this record.

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 Time and Labor assumes Taskgroup borrowing has occurred and finds a Taskgroup that contains the Task Template ID.

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.

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, 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, Time and Labor uses the TCD definition values. In either case, the system compares these values to the Time Reporter's values in HR. 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 online in 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 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

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EMPLID	PUNCH_DATETIME	PUNCH_TYPE	Add/Delete Indicator
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 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 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 Time and Labor should receive in the interface:

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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	Length	Required	Notes
1	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
2	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
3	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
4	Punch Date Time	DateTime	See interface specifications in Using Time Collection Devices	Y	Identifier.
5	Delete Date	Date	10	N	Always is Null

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_#	Data Element	Type	Length	Required	Notes
6	Task Element Code	Char	3	Y	Only for positive task element reporters.
7	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#. Time and Labor translates Badge IDs to EmplIDs.

The TCD also passes Rule Elements on this table. Rule Elements look similar to task elements. 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	Length	Required	Notes
1	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
2	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
3	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.

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#	Data Element	Type	Length	Required	Notes
4	Date Under Report	Date	10	N	Identifier (CCYY-MM-DD). This field is required if the Add/Delete indicator is *A*.
5	Sequence Number	Num	3	Y	Identifier to make each row unique.
6	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*.
7	Add/Delete Indicator	Char	1	Y	A/D, Default = A.
8	TCD ID	Char	10	Y	Indicates which TCD time transaction came from.
9	Time Reporting Code	Char	5	Y	TCD vendors may need to convert numeric code to character code.
10	Quantity	Num	12.6	Y	This field can represent hours (in hours and tenths), amount, or units.
11	Currency Code	Char	3	N	An optional currency code for when the quantity represents money.

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#	Data Element	Type	Length	Required	Notes
12	Pay Rate Override	Num	12.6	N	Can be zero. If populated, it will be used to calculate time reporter's pay.
13	Rate Code Override	Char	6	N	Override Rate Code
14	Billable Indicator	Char	1	Y	Billable Indicator for use in pay calculations (Y /N) Default=N.
15	Supervisor ID	Char	20	N	Can be blank − Supervisor ID who did the override.
16	User ID	Char	8	N	Can be blank − User ID who did the override.
17	Override Reason Code	Char	5	N	Can be blank − Reason code for the override.
18	Action Date /Time	Date Time	See interface specifications in Using Time Collection Devices	N	Can be blank − Date and Time when override occurred.
19	Task Profile ID	Char	10	N	Can be blank − override or positively reported.
20	Task Template ID	Char	10	N	Can be blank − Task Template used when positively reported.
21	Country	Char	3	N	Override Country

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#	Data Element	Type	Length	Required	Notes
22	State	Char	6	N	Override State
23	Locality	Char	10	N	Override Locality
24	Comments	Char	254	N	

The TCD system can send either Badge IDs or Empl ID/Empl Rcd#. Time and Labor translates Badge IDs to EmplIDs.

Time and Labor assumes the currency code attached to the Time Reporting Code definition unless a currency code comes in on this record.

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.

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.

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, 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, 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 online in 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 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.

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These are the rows 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 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 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.

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_#	Data Element	Type	Length	Required	Notes
1	Badge ID	Char	20	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
2	Empl ID	Char	11	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
3	Empl RCD#	Num	3	N	The TCD must send either Badge ID or Empl ID/Empl Rcd#.
4	Date Under Report	Date	10	Y	Identifier (CCYY-MM-DD)
5	Sequence Number	Num	3	Y	Identifier to make each row unique.
6	Delete Date	Date	10	N	Always is Null
7	Task Element Code	Char	3	Y	Only for positive task element reporters.
8	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#. Time and Labor translates Badge IDs to EmplIDs.

The TCD also passes Rule Elements on this table. Rule Elements look similar to task elements. 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.

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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

Time Reporter

Service Operation : TIME_DEVICE_EMPL_ATT_FULLSYNC (initialization/full table)

TIME_DEVICE_EMPL_ATT_SYNC (updates/incremental)

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_EMPL_DTA_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	EMPLID	Empl ID	Char	11
6	EMPL_RCD	Empl RCD#	Num	3
7	BADGE_ID	Badge ID	Char	20
8	TIME_RPTG_STATUS	Time Reporting Status	Char	1
9	LAST_NAME	Last Name	Char	30
10	FIRST_NAME	First Name	Char	30
11	HIRE_DT	Hire Date	Date	10

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#	Data Element	Description	Type	Length
12	SERVICE_DT	Service Date	Date	10
13	BIRTHDATE	Birth Date	Date	10
14	RESTRICTION_ PRF_ID	Restriction Profile ID	Char	10
15	TASK_PRFL_ TMPLT_ID	Task Template ID	Char	10
16	TASK_PROFILE_ ID	Task Profile ID	Char	10

Schedule

Service Operation: TIME_DEVICE_SCHEDULE_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_SCHEDULE_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	BADGE_ID	Badge ID	Char	20
6	EMPLID	Employee ID	Char	11
7	EMPL_RCD	Employee Record Num	Num	3

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#	Data Element	Description	Type	Length
8	PUNCH_DTTM	Punch Date Time	DateTime	See interface specifications in Using Time Collection Devices
9	SEQNUM	Sequence Number	Num	3
10	PUNCH_TYPE	Punch Type	Char	2

Restriction Profile

Service Operation: TIME_DEVICE_RESTRICT_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_RESTRICT_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	RESTRICTION_ PRF_ID	Restriction Profile ID	Char	10
6	RES_EARLY_IN	Early In Restriction Ind	Char	1
7	EARLY_IN_ PUNCH	Early In Margin	Num	4
8	RES_LATE_IN	Late In Restriction Ind	Char	1
9	LATE_IN_PUNCH	Late In Margin	Num	4

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#	Data Element	Description	Type	Length
10	RES_EARLY_OUT	Early Out Restriction Ind	Char	1
11	EARLY_OUT_ PUNCH	Early Out Margin	Num	4
12	RES_LATE_OUT	Late Out Restriction Ind	Char	1
13	LATE_OUT_ PUNCH	Late Out Margin	Num	4
14	RES_EARLY_ MEAL	Early Meal Restriction Ind	Char	1
15	EARLY_MEAL	Early Meal Margin	Num	4
16	RES_LATE_MEAL	Late Meal Restriction Ind	Char	1
17	LATE_MEAL	Late Meal Margin	Num	4
18	RES_EARLY_ BREAK	Early Break Restriction Ind	Char	1
19	EARLY_BREAK	Early Break Margin	Num	4
20	RES_LATE_ BREAK	Late Break Restriction Ind	Char	1
21	LATE_BREAK	Late Break Margin	Num	4

Total Hours

Service Operation: TIME_DEVICE_PER_HRS_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TOT_HRS_MSG

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#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	BADGE_ID	Badge ID	Char	20
6	EMPLID	Employee ID	Char	11
7	EMPL_RCD	Employee Record Num	Num	3
8	TRC	Time Reporting Code	Char	5
9	TL_QUANTITY	Total Payable Hours	Num	12.6

Time Reporting Code

Service Operation: TIME_DEVICE_RPTG_CODE_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TRC_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20

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#	Data Element	Description	Type	Length
5	TRC	Time Reporting Code	Char	5
6	DESCR	Description	Char	30

TCD Supervisor

Service Operation: TIME_DEVICE_SUPERVSOR_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TCDSETUP_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	TCD_ SUPERVISR_ID	Supervisor ID	Char	20
6	BADGE_ID	Badge ID	Char	20
7	SUPERVISR_PIN_ NUM	Supervisor PIN #	Num	20

TCD Task Profile

Service Operation: TIME_DEVICE_PROFILES_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TSK_PROF_MSG

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#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	TASK_PROFILE_ID	Task Profile ID	Char	10
6	DESCR	Task Profile Description	Char	30

TCD Task Template

Service Operation: TIME_DEVICE_TEMPLATES_FULLSYNC

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_TSK_TEMP_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
6	DESCR	Task Template Description	Char	30

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1. Task Template Detail (sent in TIME_DEVICE_TEMPLATES_FULLSYNC message as a child)

   Record Definition

   Record Name: TL_TEMP_DTL_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_ NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ ID	TCD Node ID	Char	20
5	TASK_PRFL_ TMPLT_ID	Task Template ID	Char	10
6	TASK_ ELEMENT_ CD	Task Element Code	Char	3
7	DESCR	Task Element Description	Char	30
8	CODE_ REQUIRED	Required(Y/N)	Char	1

2. Task Element Code Value

   Service Operation: TIME_DEVICE_TASK_VALS_FULLSYNC

   Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

   Record Definition

   Record Name: TL_CD_VALS_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_ NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ ID	TCD Node ID	Char	20
5	TASK_ ELEMENT_ CD	Task Element Code	Char	3

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#	Data Element	Description	Type	Length
6	TASK_ ELEMENT_ VALUE	Task Element Value	Char	25
7	VALUE_ SOURCE	Value Source (populated only for Codes PRJ and ACT)	Char	2

Reporting Elements Table

Service Operation: TIME_DEVICE_RPT_ELMNT_FULLSYNC (all reporting element tables are combined into one message definition)

Service Operation Queue: TIME_COLLECTION_DEVICE_SETUP

Record Definition

Record Name: TL_RPTG_ELE_MSG

#	Data Element	Description	Type	Length
1	MSGNODENAME	Message Node Name	Char	15
2	TCD_ID	TCD ID	Char	10
3	TCD_NETWORK_ ID	TCD NetworkID	Char	20
4	TCD_NODE_ID	TCD Node ID	Char	20
5	RPTG_ELE_IND	Reporting Element Indicator - See the following possible values	Char	2
6	RPTG_ELE_CODE	Reporting Element Codes	Char	10
7	DESCR	Description	Char	30

Mapping for RPTG_ELE_IND

- CO − Country
- ST − State
- LY − Locality
- SH − Shift

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- RT − Rate Code
- CC − Currency Code
- OV − Override Reason Code

Objects Sent from the TCD

Punched Time Interface

Service Operation: PUNCHED_TIME_ADD

Service Operation Queue: PUNCHED_TIME

Record Definition

Record Name: TL_PUNCH_INTFC

#	Data Element	Description	Type	Length
1	BADGE_ID	Badge ID	Char	20
2	EMPLID	Empl ID	Char	11
3	EMPL_RCD	Empl RCD#	Num	3
4	PUNCH_DTTM	Punch Date Time	DateTime	See Interface Specifications in Using Time Collection Devices
5	DELETE_DATE	Delete Date	Date	10
6	PUNCH_TYPE	Punch Type	Char	1
7	TCD_ID	TCD ID	Char	10
8	TIMEZONE	Time Zone	Char	9
9	TCD_ SUPERVISR_ID	Supervisor ID	Char	11
10	OPRID	User ID	Char	8
11	OVERRIDE_RSN_ CD	Override Reason Code	Char	5

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#	Data Element	Description	Type	Length
12	ADD_DELETE_IND	Add/Delete Indicator	Char	1
13	ACTION_DTTM	Action Date/Time	DateTime	See Interface Specifications in Using Time Collection Devices
14	TASK_PROFILE_ID	Task Profile ID	Char	10
15	TASK_PRFL_TMPLT_ID	Task Template ID	Char	10
16	COUNTRY	Country	Char	3
17	STATE	State	Char	6
18	LOCALITY	Locality	Char	10
19	TL_COMMENTS	Comments	Char	254
20	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

Punched Task Interface (sent in PUNCHED_TIME_ADD message as a child record)

Record Definition

Record Name: TL_PCHTSK_INTFC

#	Data Element	Description	Type	Length
1	BADGE_ID	Badge ID	Char	20
2	EMPLID	Empl ID	Char	11
3	EMPL_RCD	Empl RCD#	Num	3
4	PUNCH_DTTM	Punch Date Time	DateTime	26

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#	Data Element	Description	Type	Length
5	DELETE_DATE	Delete Date	Date	10
6	TASK_ ELEMENT_CD	Task Element Code	Char	3
7	TASK_ ELEMENT_ VALUE	Task Element Value	Char	30
8	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

Elapsed Time Interface

Service Operation: ELAPSED_TIME_ADD

Service Operation Queue: ELAPSED_TIME

Record Definition

Record Name: TL_ELP_INTFC

#	Data Element	Description	Type	Length
1	BADGE_ID	Badge ID	Char	20
2	EMPLID	Empl ID	Char	11
3	EMPL_RCD	Empl RCD#	Num	3
4	DUR	Date Under Report	Date	10 (CCYY-MM-DD)
5	SEQNUM	Sequence Number	Num	3
6	DELETE_DATE	Delete Date	Date	10
7	ADD_DELETE_ IND	Add/Delete Indicator	Char	1
8	TCD_ID	TCD ID	Char	10

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#	Data Element	Description	Type	Length
9	TRC	Time Reporting Code	Char	5
10	TL_QUANTITY	Quantity	Num	12.6
11	CURRENCY_CD	Currency Code	Char	3
12	OVERRIDE_RATE	Pay Rate Override	Num	12.6
13	COMPRATE_CD	Rate Code Override	Char	6
14	BILLABLE_IND	Billable Indicator	Char	1
15	TCD_ SUPERVISR_ID	Supervisor ID	Char	20
16	OPRID	User ID	Char	8
17	OVERRIDE_RSN_ CD	Override Reason Code	Char	5
18	ACTION_DTTM	Action Date/Time	Date Time	26
19	TASK_PROFILE_ ID	Task Profile ID	Char	10
20	TASK_PRFL_ TMPLT_ID	Task Template ID	Char	10
21	COUNTRY	Country	Char	3
22	STATE	State	Char	6
23	LOCALITY	Locality	Char	10

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#	Data Element	Description	Type	Length
24	TL_COMMENTS	Comments	Char	254
25	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

Elapsed Task Interface (sent in ELAPSED_TIME_ADD message as a child record)

Record Definition

Record Name: TL_ELPTSK_INTFC

#	Data Element	Description	Type	Length
1	BADGE_ID	Badge ID	Char	20
2	EMPLID	Empl ID	Char	11
3	EMPL_RCD	Empl RCD#	Num	3
4	DUR	Date Under Report	Date	10 (CCYY-MM-DD)
5	SEQNUM	Sequence Number	Num	3
6	DELETE_DATE	Delete Date	Date	10
7	TASK_ ELEMENT_CD	Task Element Code	Char	3
8	TASK_ ELEMENT_ VALUE	Task Element Value	Char	30
9	AUDIT_ACTN	For PeopleSoft Processing only; always leave field blank	Char	1

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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

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Task Element Code	Description
RES	Resource SubCategory
RET	Resource Type
TSK	Task
UF1	User Field 1
UF2	User Field 2
UF3	User Field 3
UF4	User Field 4
UF5	User Field 5

List of Valid Time Zones

Value	Description
ACST	AUS Central Time, Darwin
AFST	Afghanistan Time, Kabul
ARST	Arabian Time, Abu Dhabi, Muscat
AST	Atlantic Time (Canada)
AZST	Azores Time, Cape Verde Is.
BST	Bangkok Time, Hanoi, Jakarta
CASST	Central Asia Time, Almaty, Dhaka
CAUST	Central Australia, Adelaide
CHST	China Time, Beijing, Hong Kong

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Value	Description
CPST	Central Pacific, Magadan, Solomon Is.
CST	Central Time
CSTST	Central Time no Daylight Savings
DST	Dateline Time, Eniwetok, Kwajalein
EAUST	East Australia Time, Brisbane, Guam
EEST	East Europe Time, Bucharest
EGST	Egypt Time, Cairo
EKST	Ekaterinburg Time
ESAST	East South America Time
EST	Eastern Time
ESTST	Eastern Time no Daylight Savings, Indiana
FLEST	FLE Time, Helsinki, Riga
FST	Fiji Time, Kamchatka, Marshall Is.
GFTST	GFT Time, Athens, Istanbul, Minsk
GMT	GMT, London, Dublin, Lisbon, Edinburgh
GMTST	GMT Standard Time, Casablanca
HST	Hawaiian Time
IRST	Iran Time, Tehran
IST	India Time, Bombay, Calcutta, New Delhi

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Value	Description
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

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Value	Description
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

Configuration of the Integration Broker and the TCD

This section discusses:

- Outgoing service operations from PeopleSoft to the TCD server.
- Incoming service operations from TCD server to PeopleSoft .

Outgoing Service Operations From PeopleSoft to TCD Server

To view Outbound messages and service operations, use PeopleTools Integration Broker, Integration Setup.

Note. Messages are associated with service operations, which are delivered *Inactive*. You must activate the service operations and the associated handlers, routings, and queues.

Queues are delivered in *Pause* status. You must change these to *Run* on the Queue Definitions page.

Service Operations

The following table lists the outbound service operations:

Name	Description
TIME_DEVICE_EMPL_ATT_FULLSYNC	Full Set of Employees for TCD
TIME_DEVICE_EMP_ATT_SYNC	Incremental update of EE to TCD
TIME_DEVICE_PERS_HRS_FULLSYNC	TCD Period TotHrs Full Sync
TIME_DEVICE_PROFILES_FULLSYNC	TCD Task Profiles Full Sync

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Name	Description
TIME_DEVICE_RESTRICT_FULLSYNC	TCD Restriction Prof_Full Sync
TIME_DEVICE_RPTG_CODE_FULLSYNC	TCD TRC Full Sync
TIME_DEVICE_RPT_ELMNT_FULLSYNC	TCD Reporting Element FullSync
TIME_DEVICE_SCHEDULE_FULLSYNC	TCD Schedules Full Sync
TIME_DEVICE_SUPERVISOR_FULLSYNC	TCD Supervisor Full Sync
TIME_DEVICE_TASK_VALS_FULLSYNC	TCD Task Elemnt Vals Full Sync
TIME_DEVICE_TEMPLATES_FULLSYNC	TCD Task Templates Full Sync

Queue

All the service operations above are associated with the following queue.

Name	Description
TIME_COLLECTION_DEVICE_SETUP	Time Collection Device Setup

Configuring Outbound Setup Tables

Configure the setup tables for outbound messages and service operations by defining the:

- Task Profile

  Make sure to check the Send to TCD box on the Task Profile page.

  See Chapter 7, “Defining Task Reporting Requirements,” Creating Task Profiles, page 153.

- Taskgroup

  You will only publish those task profiles with Send to TCD selected.

  See Chapter 7, “Defining Task Reporting Requirements,” Creating Task Profiles, page 153.

- Time Reporting Code

  You will only publish those task profiles with Send to TCD checked.

  See Chapter 6, “Establishing Time Reporting Codes,” Defining and Mapping Time Reporting Codes (TRCs), page 103.

- TRC Program

  You will only publish those TRCs with Send to TCD checked on the Time Reporting Code page.

  See Chapter 6, “Establishing Time Reporting Codes,” Defining TRC Programs, page 117.

- TCD Type Definition

  See Chapter 16, “Using Time Collection Devices,” Pages Used to Define TCD Setup Data in Time and Labor, page 432.

- TCD Setup

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See Chapter 7, "Defining Task Reporting Requirements," Creating Task Profiles, page 153.

- TCD Group

See Chapter 7, "Defining Task Reporting Requirements," Creating Task Profiles, page 153.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Routing Rules

Handler/application class and OnRouteSend codes are in application classes. To see the codes, open the application package with the same name as the message. The OnRouteSend code is located under the RoutingHandler class. The handler/application class is located under the class that has the same name as the message.

Service Operations Monitor

Information on the Service Operations Monitor is in the Integration Broker PeopleBook.

See *Enterprise PeopleTools PeopleBook: Integration Broker, "Using the Service Operations Monitor"*

Incoming Service Operations from the TCD Server to the PeopleSoft Server

The following are incoming service operations from the TCD server to the PeopleSoft server, and online pages to check for errors and reported time:

- Service Operations and Queue

  The two service operations for incoming messages are: ELAPSED_TIME_ADD (Elapsed Time Interface message) and PUNCHED_TIME_ADD (Punched Time Interface message).

  The queues for these two messages are: ELAPSED_TIME (Elapsed Time queue) and PUNCHED_TIME (Punched Time queue).

  The handler of the service operations triggers the TL_ST_LOADER. Application Engine process that inserts rows into the Reported Time Tables. TL_ST_LOADER also initiates the Validation process for the validations defined on the TL Installation page.

- TCD Error Queue

  This page is located in Set Up HRMS, System Administration, Utilities, Analyze Time and Labor, Review TCD Errors. Using TCD Error Queue, you can check any errors for the Publishing Node you are using. If there are no errors found for the node, you can see the time in the reporting pages.

  See Chapter 16, "Using Time Collection Devices," page 425.

- Report Time

  This page is located in Manager Self-Service, Time management, Report Time, Timesheet. This page displays the list of employees using the Find feature on the grid. Select Timesheet and then click on Name which opens with the current date as the start of the week. you can change the Week begin date and click Refresh Date.

See Chapter 21, "Using Manager Self-Service Components for Time Management and Reporting," Reporting Time, page 595.

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System and Integration Broker Configuration

Make sure you configure the system and Integration Broker for this integration.

See *Enterprise PeopleTools PeopleBook: Integration Broker, "Understanding Creating and Implementing Integrations"*

Node and Gateway Configuration

This section provides some of the specifics for setting up nodes and gateways for the TCD interface. Use pages in the PeopleTools, Integration Broker, Integration Setup menu and PeopleTools, Integration Broker, Configuration menu to complete this configuration.

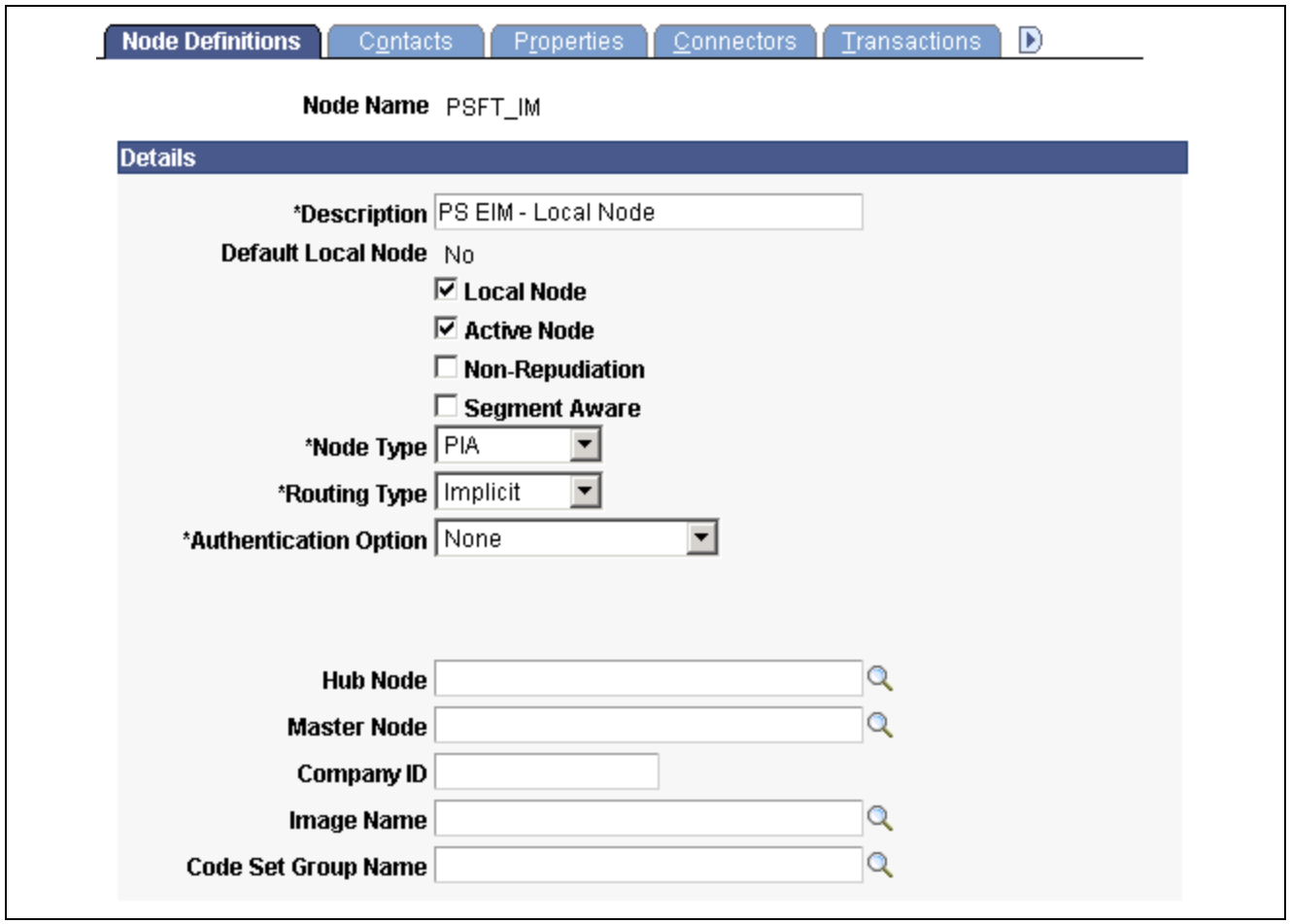
Defining the Local Node

This table provides the specific configuration details for this integration:

Page	Configuration Specifics
Node Definitions	The Node Definition is located in PeopleTools, Integration Broker, Integration Setup, Nodes. Make sure that the Node Type is set to *PIA (internal, local)* and that you select both Local Node and Active Node.
Connectors	Make sure that you set Connector ID to *PSFTTARGET* because the local node always uses this value for the 8.4x tool set.
Routings	Routings are defined in PeopleTools, Integration Broker, Integration Setup, Services Operations, Routings. Alternatively, use PeopleTools, Integration Broker, Integration Setup, Routings to define routings. Refer to the Integration Broker PeopleBook for more details on how to set up the routings. Once the routings are set up properly, make sure to activate them. If using flat file architecture, make sure that TIME_DEVICE_XXXX service operations have both *OutAsync* and *InAsync* specified with a Status of *Active*. Flat files are generated by the local Node for each Flat File TCD Server. The location of output is defined on the TL Installation page and the TL General Settings page.

Access the Node Definitions page.

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Node Definitions page

Access this page from PeopleTools, Integration Broker, Integration Setup, Node Definitions. Make sure that the Node Type is set to *PIA (internal, local)* and Routing Type is set to *Implicit* and that you check both Local Node and Active Node.

Access the Connectors page.



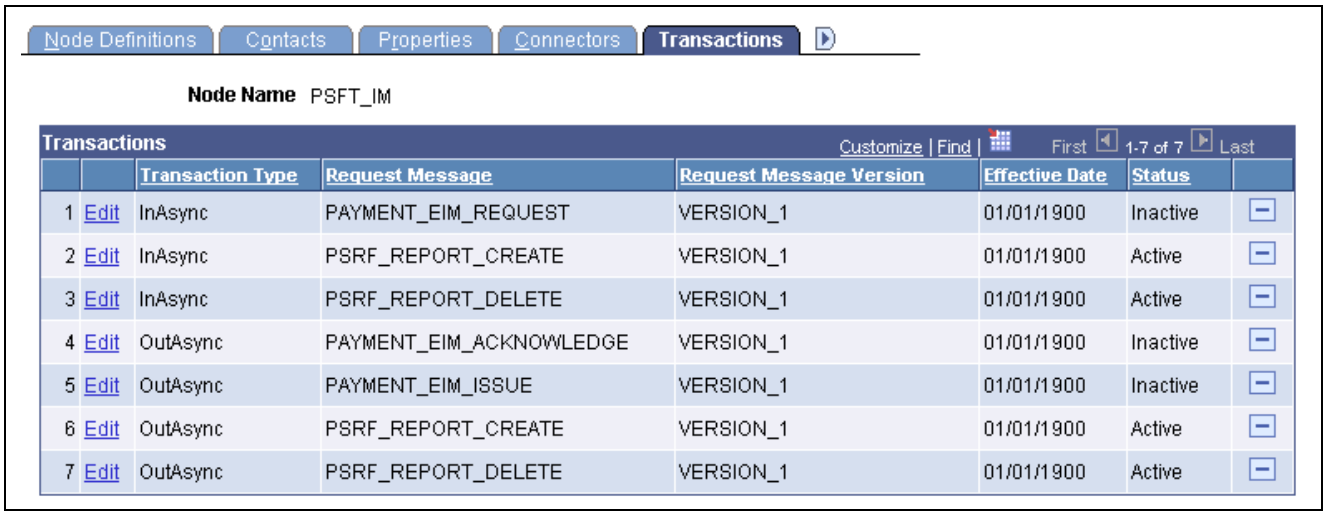
Connectors page

Make sure that you set Connector ID to *PSFTTARGET* as the local node always uses this value for the 8.4x tool set.

Access the Transactions page.

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See Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker.



Transactions page

If using flat file architecture make sure that TIME_DEVICE_XXXX messages have both *OutAsync* and *InAsync* specified with a Status of *Active*. Flat files are generated by the local Node for each Flat File TCD Server. The location of output is defined on the TL Installation Page and the TL General Settings Page.

Defining the External TCD Nodes

This table provides the specific configuration details for this integration:

Page	Configuration Specifics
Node Definitions	TCD Nodes are required only for XML messaging. Make sure that the Node Type is set to *External* and that you select Active Node.
Connectors	Make sure that you set Connector ID to either *PSFT81TARGET* or *HTTPTARGET* . **Note.** *PST81TARGET* is used for external TCD servers which are compliant with 8.1x or 8.2x PeopleTools. *HTTPTARGET* is used for TCD servers which can support 8.4x toolset documentation. Click Ping Node to access the Ping Node Results page.
Routings	Make sure to specify the Time_Device_ xxxx message as *outsync* and Elapsed and Punch messages as *inasync.* Make sure to specify outbound and inbound transactions for the external node. The routing type should be *implicit.*

Access the Node Definitions page.

Defining the Gateway for the PeopleSoft System

Access the Gateways page.

The gateway for the Peoplesoft local node is typically http://server/PSIGW/PeopleSoftListeningConnector.

The gateway on TCD servers that do not support 8.4x Integration Broker is http://xtnt05.peoplesoft.com /PSIGW/PS81ListeningConnector. The gateway on TCD servers that do support 8.4x Integration Broker is http://server/PSIGW/PeopleSoftListeningConnector.

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See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker

Enterprise Components Configuration

Use pages in the Enterprise Components, Integration Definitions menu to complete this configuration.

This table describes the specifics for configuring enterprise components for the TCD interface:

Page	Configuration Specifics
Batch Publish Rules	**Note.** If you are using a delivered process, only set those settings that make that process active. The TL_OUTTCD Application engine process uses Batch Publish Rules to publish the messages to TCD Servers. Activate the rules that you will use for TCD Interface. TL_OUTTCD Application engine also triggers service operations to be published.
File Inbound	Activate inbound file rule if you are using flat file integration. Make sure to set the Inbound File to the appropriate location and set Status to *Active.*
Inbound File (Publish)	Make sure the Request ID is defined. In the Process Frequency group box, select Once if you are running the process with run control ID only one time or select Always if you are using same run control ID repeatedly.

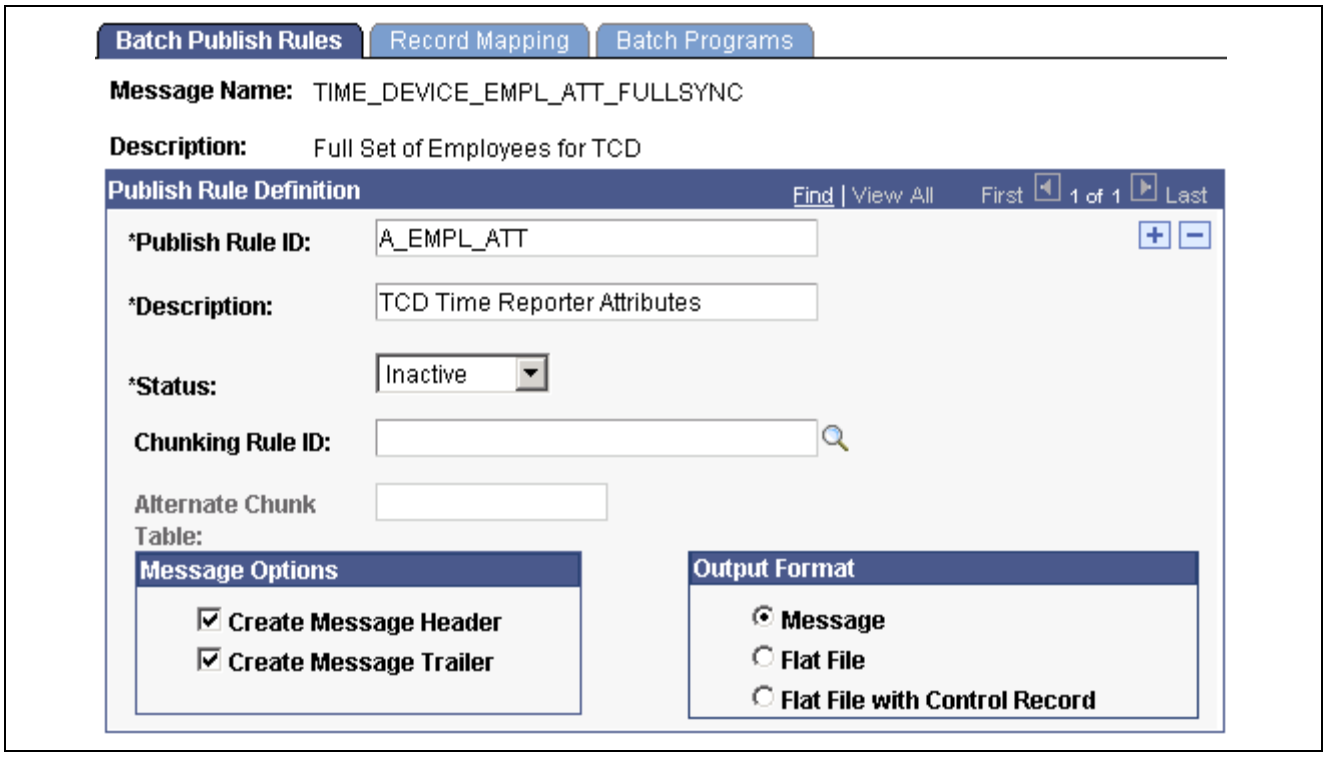
Access the Batch Publish Rules page.

Message Name	Description
TIME_DEVICE_EMPL_ATT_FULLSYNC	Full Set of Employees for TCD
TIME_DEVICE_EMPL_ATT_SYNC	Incremental Update of EE toTCD
TIME_DEVICE_PER_HRS_FULLSYNC	TCD Period TotHrs Full Sync
TIME_DEVICE_PROFILES_FULLSYNC	TCD Task Profiles Full Sync
TIME_DEVICE_RESTRICT_FULLSYNC	TCD Restriction Prof Full Sync
TIME_DEVICE_RPTG_CODE_FULLSYNC	TCD TRC Full Sync
TIME_DEVICE_RPT_ELMNT_FULLSYNC	TCD Reporting Element FullSync
TIME_DEVICE_SCHEDULE_FULLSYNC	TCD Schedules Full Sync
TIME_DEVICE_SUPERVSOR_FULLSYNC	TCD Supervisor Full Sync
TIME_DEVICE_TASK_VALS_FULLSYNC	TCD Task Elemnt Vals Full Sync
TIME_DEVICE_TEMPLATES_FULLSYNC	TCD Task Templates Full Sync

Batch Publish Rules search page

The list that appears are the messages that you can select to configure the messages to be published.

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Batch Publish Rules page

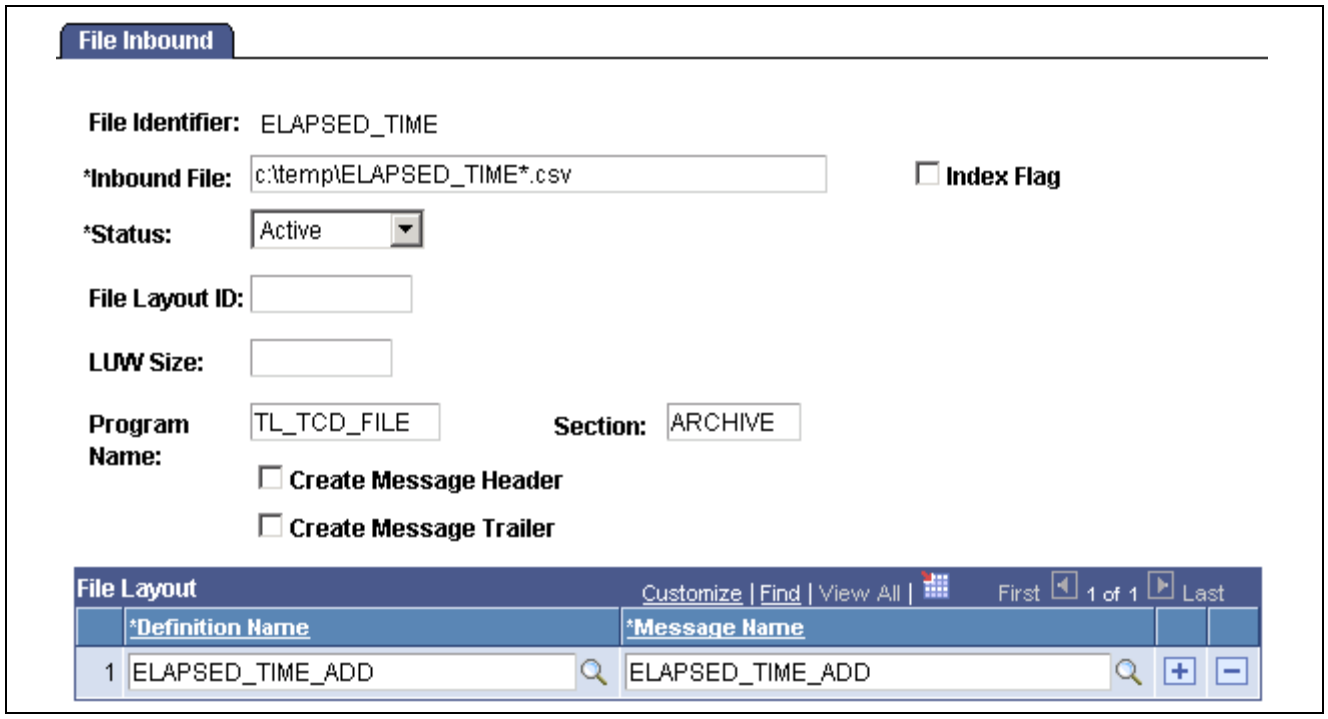
Note. If you are using a delivered process, only set those settings that make that process active.

Access this page from Enterprise Components, Integration Definitions, Batch Publish Rules. The TL_OUTTCD Application engine process uses Batch Publish Rules to publish the messages to TCD Servers. Activate the rules, which you will use for TCD Interface. TL_OUTTCD Application engine also triggers Messages to be published.

Inbound File Rules

Access the File Inbound page.

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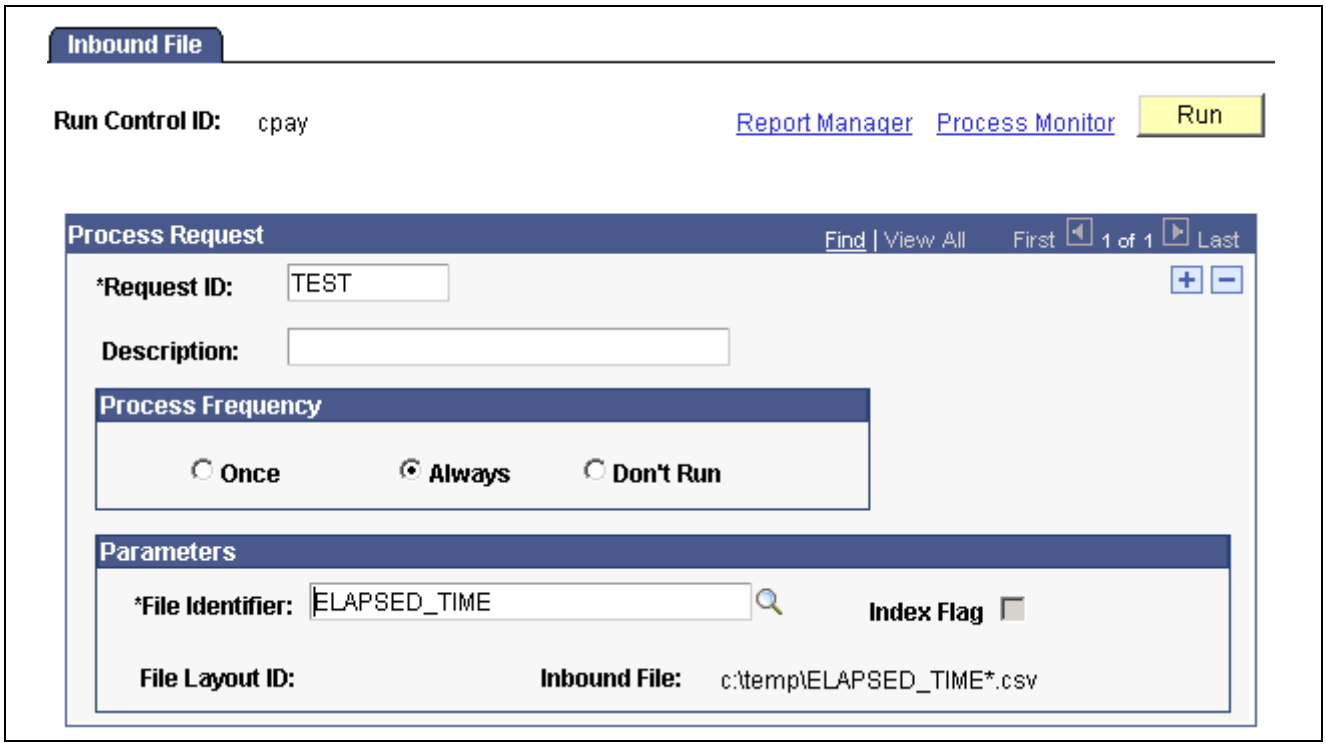
File Inbound page

Access this page from Enterprise Components, Integration Definitions, Inbound File Rule. Activate inbound file rule if you are using flat file integration. Make sure to set the Inbound File to the appropriate location and set Status to *Active*.

Inbound File Publish

Access the Inbound File (publish) page.

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Inbound File (publish) page

Access this page from Enterprise Components, Integration Definitions, Initiate Processes, Inbound File Publish. Make sure the Request ID is defined. And in the Process Frequency group box, select either Once (if you are running the process with Run Control ID only one time, or select Always if you are using same Run Control ID repeatedly.)

See Also

Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions PeopleBook

Error Handling and Resolution

The following lists possible issues that may arise:

Question	Answer
Outgoing Messages from the PeopleSoft server to the TCD server: TL_OUTTCD is successful: No messages generated.	Make sure that: —Queues are in *Run* mode. —Routings are specified..in the service operations. —Service operations are active. —Batch Publish Rule is selected. —External Node and Transaction Routing Type is specified as Explicit, instead of Implicit.

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Question	Answer
Incoming messages from the TCD server to the PeopleSoft server. This error message appeared: "<?xml version="1.0" ?><reply><operations><exception><title>Publish Subscribe Message Exception< /title><defaultmsg>psft.pt8.gateway.PublicationHandlerException: </defaultmsg><msgset>94</msgset><msgid>1< /msgid><parameters count= "1"><parm>psft.pt8.gateway.PublicationHandlerException: </parm></parameters></exception>< /operations></reply> <?xml version="1.0" ?><reply><operations><exception><title>Publish Subscribe Message Exception< /title><defaultmsg>psft.pt8.gateway.PublicationHandlerException: </defaultmsg><msgset>94</msgset><msgid>1< /msgid><parameters count= "1"><parm>psft.pt8.gateway.PublicationHandlerException: </parm></parameters></exception>< /operations></reply>"	This error message signifies that the transaction is not specified for that TCD Server node.
Ping does not work from the People Soft server to the TCD server.	Make sure you are using the appropriate target connector as discussed in Node configuration.
How do I purge message details?	DELETE FROM PSAPMSGPUBHDR; DELETE FROM PSAPMSGPUBDATA; DELETE FROM PSAPMSGPUBCON; DELETE FROM PSAPMSGSUBCON; DELETE FROM PSAPMSGPUBCERR; DELETE FROM PSAPMSGPUBERR; DELETE FROM PSAPMSGSUBCERR; DELETE FROM PSAPMSGPUBCERRP; DELETE FROM PSAPMSGPUBERRP; DELETE FROM PSAPMSGSUBCERRP; DELETE FROM PSAPMSGARCHPC; DELETE FROM PSAPMSGARCHPD; DELETE FROM PSAPMSGARCHPH; DELETE FROM PSAPMSGARCHSC;
Flat files were not created for outbound messages, but messages were generated in the Service Operations Monitor.	Make sure that: Routing are defined properly in the service operations. —Handlers are active on all the service operations. —You are looking at the right location, which is specified on TL Installation page (TL General setting). —TL_OUTTCD has not generated any errors. —Your Application server and process scheduler has read and write access to the file location.
The flat file is not empty after the Inbound File Publish process is run.	Make sure that: —The file location is properly specified on the Inbound File Rule page. —Inbound File Rule is active. —The Inbound File process run control has Process Frequency set to Always or Once (as needed). —You are following comma delimiter for each column. —The Inbound File Rule is active. —The file name is ELAPSED_TIME*.CSV or PUNCHED_TIME*.CSV
The messages transactions are not same as in the flat file.	Make sure that each row in the flat file has a carriage return in the sense each transaction should be a new line in simple sense each line by hitting your return/key.

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Question	Answer
I am getting a large message.	When the message size exceeds the size set on the PeopleTools, Options pages, the message splits into multiple messages. For Full-sync, there would be one header followed by multiple data messages and then one trailer.
I am receiving header and footer information only.	Service Operations are active but probably TCD Type setup is not appropriate, or no data to publish Task elements and or time reporting elements or schedules.
Where can I find the Message log and the Error log?	Msg Log : http://server/PSIGW/msgLog.html and, Error Log : http://server/PSIGW/errorLog.html

Frequently Asked Questions

The following table addresses some frequently asked questions:

Question	Answer
Is a password necessary for the Node definition?	No, it is not. If the external node wants to enforce the password , you need to specify that on the Node Definitions page of the external node.
Do all the downloads have the TCD ID?	Yes, each TCD will get employee population and other information.
Will each TCD record its own employee information?	Yes, each TCD will get employee population and other information.
Why do I see two data messages for one full_sync publish?	If a message exceeds the allotted size, the message is divided into multiple messages. For example, if the TCD server receives the header followed by multiple data messages and then a trailer.
What is the Operator ID (char 8) in the Punched and Elapsed transactions? How do I validate this information?	Oprid : can be left blank or it is up to implementation site if they want to populate with the ID of the person who is punching.
Why don't I see the header message for TIME_DEVICE_EMPL_ATT_SYNC?	Empl Att sync will not have header and trailer as it is considered as incremental message, this is the only message which is incremental. The TCD server receives all other messages are Full Synch which will have header, data and trailer messages.

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APPENDIX C

Referential Integrity

This appendix provides an overview of Referential Integrity (RI).

Background Processing

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. Two of these processes are Referential Integrity (RI) and Time Validation. The system uses default processing to determine the correct information for processing time.

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

RI starts working after you select the Referential Integrity check box on the Time and Labor Installation page.

The Referential Integrity process:

- Determines affected 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 the Time Administration process.
- Creates or resolves exceptions during the Time Administration process.

  When processing data through 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 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

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- Workgroups
- Taskgroups
- Task profiles
- Rule programs
- Shifts, Schedules, and schedule assignments
- Time period calendars
- Comp time plans
- Time reporter association to comp time plans
- DeptID change 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 affected by the effective-dated change on the target table. Changing the effective date in a target table to a date greater than that in the prompt table generates an error.

This table lists the relationships between target and prompt tables.

Target Table (Main Page)	Prompt Table (Table Assigned to Main Page)
Workgroup	Rule Program ID TRC Program Compensatory Time Off Plan

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Target Table (Main Page)	Prompt Table (Table Assigned to Main Page)
Time Reporting Code	Unit of Measure NA Earnings Code Global Payroll Take Code Global Payroll Earnings Code
TRC Program	Time Reporting Code
Comp Time Plan	Time Reporting Code
Taskgroup	Task Profile
TCD Setup	TCD Type TRC Program Taskgroup
TL Empl Data (Create Time Reporter Data or Maintain Time Reporter Data)	Workgroup Taskgroup TCD Group Rule Elements 1-5
Schedule	Shift

Nested Effective-Dated Tables

The RI process acts upon effective dates throughout the application. It does not enable effective-dated changes to objects that are nested in other effective-dated objects when the change invalidates the association between the two. It prevents this from occurring in these 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. Also, the TRC Program effective date cannot be later than the effective date of the workgroup, TCD group, and so on.

- The system does not enable 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.

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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.

This table lists the relationships 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

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Source Table (Prompt Table) Table Assigned to the Main Page	Target Table (Main Page)
Shift	Schedule Definition
Workday	Schedule Definition
Create/Maintain Time Reporter Data	Comp Plan Enrollment

Referential Integrity Triggers

When you change an effective-dated setup object, these 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 affected 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 RI review process.

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

   - Change their Time Administration status so that they are selected for Time Administration processing.
   - Set their earliest change date to the first instance of reported or payable time that is equal to, or greater than, the effective date of the setup table change.
   - Run the Time Validation process 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 February 28, 1990. You decide to change the TRC Program on Workgroup A for the effective date of January 1, 1990 from TRC Program A to TRC Program B.

Workgroup	TRC Program ID	Effective Date
Workgroup A	TRC Program A	January 1, 1980

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Workgroup	TRC Program ID	Effective Date
Workgroup A	TRC Program B	January 1, 1990
Workgroup A	TRC Program A	January 1, 1995 (future time can be reported up to this next effective date)

All TRCs reported between the effective date of January 1, 1990 and January 1,1995 need review. If the TRCs reported during this 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 the RI process to correctly trigger changes to JOB Data, the DEPT_SYNC message must be active on the ENTERPRISE_SETUP queue, which is delivered with PeopleSoft Integration Broker.

See Also

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 the RI process to check for setup changes that may affect processed time.
- Verifies that changes, either system generated or user generated changes, do not negatively affect the system or create errors related to reported or payable time.
- Processes validations before creating payable time.

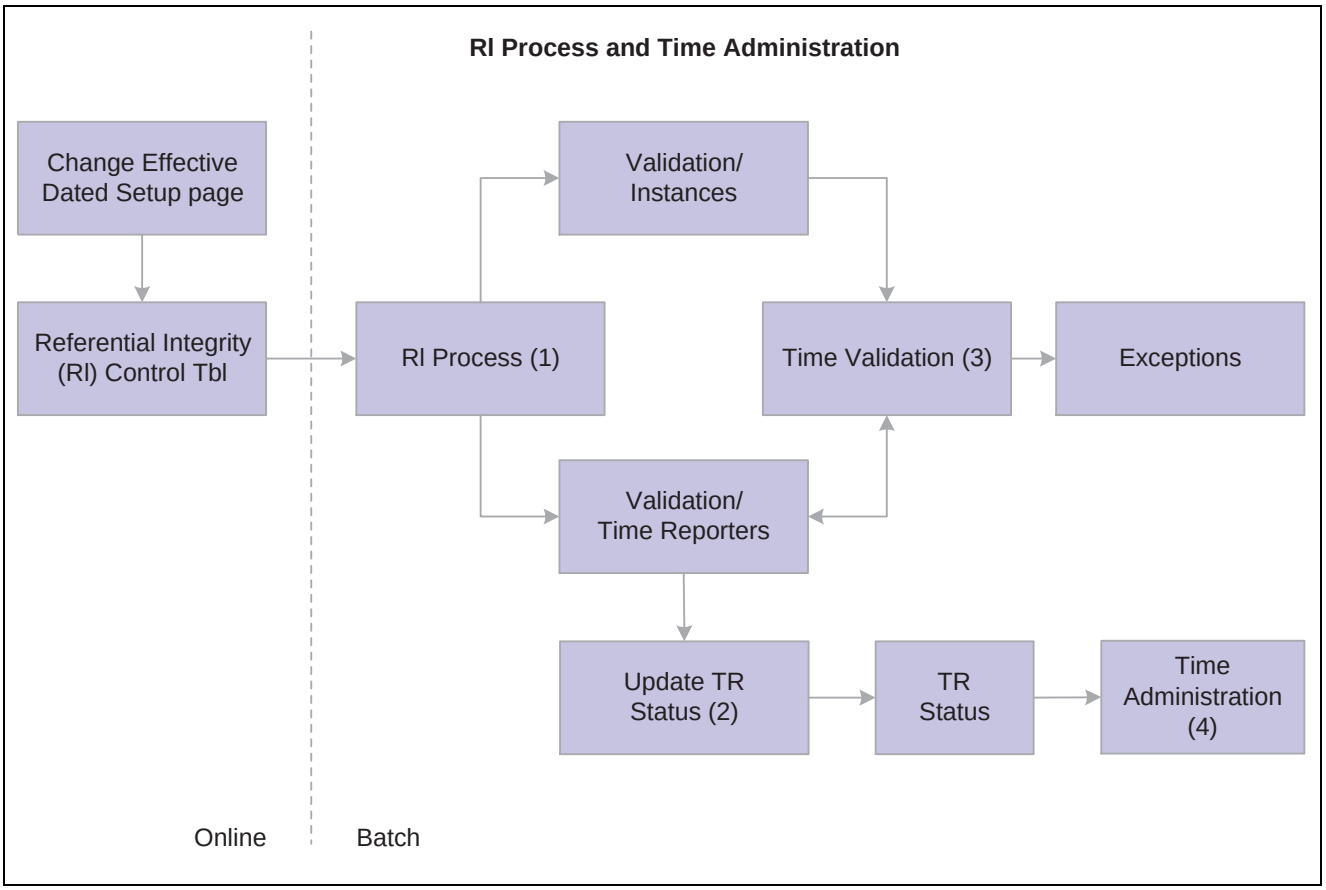
  These include compensatory time, leave, TRC, task, and time reporter status validations. This ensures that the payable time is valid.

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 RI 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.

This flow chart shows the high-level view of the RI process and Time Administration process:

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Referential Integrity Process and Time Administration

See Also

Chapter 12, "Creating Rules in Time Administration," page 227

Chapter 13, "Understanding the Batch Process in Time Administration," page 315

Time Reporting Codes and Referential Integrity

When you make a change to one area of the application, the RI process 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.

Prevention of Inactivation or Deletion of Effective-Dated Rows

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

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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.

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

Task Reporting and Referential Integrity

When you make a change to one area of Time and Labor, the RI process 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.

Prevention of Inactivation or Deletion of Effective-Dated Rows

This 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.

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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

Time Administration and Referential Integrity Triggers

This section provides a table listing the situations in which Referential Integrity is initiated and is processed through Time Administration.

This table lists the RI 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

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Page	Prompt on Page	System Action	Validation ID	Trigger TA?
Comp Plan Enrollment	Compensatory Time Off Plan	Add/Del/Update	TLX00001	Y
Time Reporting Code	TRC Type − Changed to Hours	Update	TLX00490	Y
	TRC Type − Changed to Amount	Update	TLX00500	Y
	TRC Type − Changed to Units	Update	TLX00510	Y
	Maximum Quantity	Update	TLX00450	Y
	Minimum Quantity	Update	TLX00450	Y
	Flat Amount	Update	TLX00460	Y
	Rate	Update	TLX00470	Y
	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

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Page	Prompt on Page	System Action	Validation ID	Trigger TA?
	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
			TLX00100	
	Default Task Profile ID	Update	None	Y
Taskgroup (Profile)	Task Profile ID	Inactivate	TLX00070	Y
			TLX00080	

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Page	Prompt on Page	System Action	Validation ID	Trigger TA?
		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
Assign Work Schedule	Schedule ID	Update	None	Y
Override Scheduled Workday	Shift	Add/Update	None	Y
Job Data	All Fields	Add/Update	TLX00830*	Y
Department	Use Actuals Distribution	Update	TLX00830**	Y
Leave Plan Table	Maximum Negative Hours Allowed	Update	TLX00010	Y
	Accrued Balance Goes Negative	Update	TLX00010	Y

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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	UpdateECD	TLX00010	Y

*Any effective dated change to JOB data for an employee causes the ECD for the employee to be moved back to the earliest instance of reported or payable time that is on or after the effective dated change to JOB data. When the Time Administration process is run a new row in the RI Control table validates this time for this employee, and processes validation TLX00830, which checks that the Commitment Accounting flag is in consistent with the taskgroup in reported and payable time, and the DEPTID on JOB data for the employee. The update to the RI Control table for the JOB data change is made possible through the use of the Workforce Sync message.

**Any change to a department in the Department table triggers the Department Sync message to insert a row into the RI Control table to validate that no employee that is associated with the department has a change in the commitment accounting flag that is inconsistent with the commitment accounting flag of the taskgroup used in reported or payable time for that employee, as of the effective date of the change or greater.

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.

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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

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APPENDIX D

Delivered Workflow for Time and Labor

This appendix discusses workflows for Time and Labor.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflow for Time and Labor

This section discusses Time and Labor workflow.

Overtime Request

This section discusses the Request Overtime workflow.

Description

Event Description	An employee completes and submits an overtime request and generates an email and/or worklist entry that is sent to the employee's manager.
Action Description	When the Worklist entry is selected (or the link in the email selected) by the manager, the system transfers the manager to the Approve Overtime Request page, where the overtime request is approved or denied. When the request is either approved or denied, the employee is notified via email.
Notification Method	Email and/or Worklist

Workflow Objects

Event	An employee submits an overtime request for approval
Workflow Action	Automatic
Role	Employee
Email Template	TriggerBusinessEvent(@&BusProc, @&Activity, @&EmailEvent)
Business Process	TL_OVERTIME
Business Activity	TL_OVERTIME
Business Event	Request overtime approval and notification.

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APPENDIX E

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.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

Time and Labor Reports: A to Z

This table lists the Running Time and Labor reports, sorted alphanumerically by report ID. The reports listed are all SQR reports.

Report ID and Report Name	Description	Navigation	Run Control Page
TL001 Payable Status	Generate TL001 that 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.	Time and Labor, Reports, Payable Status	TL_RUNCTL_TL001
TL002 Generating a Time Card	Generate TL002 that 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.	Time and Labor, Reports, Time Card	TL_REPORTS_RNCTL

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Report ID and Report Name	Description	Navigation	Run Control Page
TL003 TCD Usage	Generate TL003 that totals 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.	Set Up HRMS, Product Related, Time and Labor, Time Collection Devices, Send Setup to TCD	TL_TCD_RUN_PNL
TL004 Scheduled Hours Rpt	Generate TL004 that 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.	Time and Labor, Reports, Scheduled Hours	TL_SCHRPT_RNCTL

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Glossary of PeopleSoft Enterprise Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method

In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type

In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process

A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension

In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt

Items shipped from a warehouse or vendor to another warehouse.

direct ship

Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree

In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division

In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing

A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree

A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table

A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date

A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger

Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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meta-SQL Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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Index

A

absence event data
  integration with the payroll system 521
Absence Event Data
  integration with Global Payroll 524
Absence Event Details
  Timesheet entry 468
Absence Events
  Timesheet entry 466
Accumulators page 603, 606
Action Detail page 274, 276
action details for rules
  defining 276
Action Header page 274
Action SQL Text Resolution page 305
actions and conditions
  assembling to create rules 305
  copy actions 279
  copy conditions 283
  defining condition details 281
activity codes
  task values and 147
Activity ID page 146
actual costs 398
additional documentation xxvi
Adjust Paid Time page 488
Adjust Reported Time
  Timesheet page 478
Adjust Reported Time page 475
adjusting paid time
  effects on labor distribution and dilution 513
adjusting time 487
  offsets and 363
  rules and 362
AE Section Definition page 70
AE sections
  defining validations and 70
allocating costs 503
  See Also labor distribution and dilution
application engine
  time administration and 315
Application Engine processes
  overview of Time Administration 318
application fundamentals xxv
Application Items page 589, 593
Application Suites page 589, 593
Apply Schedule button 599
Approval Required page 266, 269
Approve Employee Overtime 617
Approve Overtime Requests page 617
Approve Payable Time - Approve Time for Time Reporters page 475
Approve Payable Time page 475, 477
Approve Reported Time Summary page 462
approving payable time 474
approving reported time 462
Archive Batch Detail page 376, 381
Archive Rule Map Detail page 376, 383
Archived Batches page 376
  filter options 380
Archived Rule Maps page 376, 382
Assign Schedule To Group page 218
Assign Work Schedule page 631
attendance
  programs 298
  setting up in rules 299
  tracking 356
  tracking methods 299
Attendance Actions page 301, 302
Attendance Program page 301
attendance tracking
  rules and 298
AUDIT_TL_PAY_TM table
  PeopleSoft Query 14
auditing time 491
Automatic Joins page 286, 293

B

Badge Detail page 207
basic tables, setting up 15
batch processing 315
  adjusting time and 362
  compensatory time balances and 357
  concurrent processing 19
  exceptions and 362
  launching 371
  overview 315
  post rules and 356

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restarting 374
rules and 228
time reporters and 335
tracking attendance and 356
using, tips 383
borrowing taskgroups, groups and 190
Build Time Period Calendar 23
Build Time Period Calendar page 59
business processes 1

C

Calendar View Options page 62
calendar views, *See* manager calendar views
calendars
Build Time Period Calendar 23
building 23, 54
building rules 56
defining 59
schedules and 163
calendars and periods
determining rule application 21
types 20
using 20
ChartFields
using 132
Check Reversals
PNA 537
Comments page 475
comments, submitting xxx
Commitment Accounting 540
See Also integrating with Commitment Accounting
distributing actuals 542
distributing costs 543
setting up the integration 542
understanding 540
common elements xxx
communication settings
time collection devices and 436
compensation controls
defining 80
compensation plans 216
enrolling time reporters 205
TL installation page and 205
Compensatory Plan Enrollment page 216
compensatory time balances
batch processing and 357
Compensatory Time Off Plan page 66
Compensatory Time page 563, 574, 603
compensatory time plans
establishing 66
time reporting codes and 68
Complex Time Period page 44, 47
component
SQL object 285
Condition Detail page 274
configurable manager views
overview 12
Configurations page 27, 36
contact information xxx
Copy Action page 274, 279
copy actions
rules and 279
Copy Condition page 282
Copy Conditions page 274
copy rules 310
Copy Rules page 305, 310
Copy Schedules page 638
Copy SQL Object page 297
Copy SQL Objects page 287
Copy TRC Program page 117, 118
correcting errors
during Load and Extract Processes 515
Create Time Reporter Data page 207
cross-references xxix
currency codes 398
Customer Connection website xxvi
Customer page 146

D

Daily Schedule Detail 643
Daily Time Calendar page 610
Daily Time Period page 44
data archive templates 12
data stores, intermediate payable time and 349
data, refreshing 514
Dates Table Load page 27, 38
day breaker
example of 92
understanding 90
default reporting
task reporting and 126
Define Condition Detail page 281
Define Condition Header page 274, 280
Define Exception page 25
Define Rule Header page 305
Define Rule Steps - Description page 308
Define Rule Steps page 305, 307
Details page 551, 553

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diluting labor 503
distributing labor 503
rules for generating 505
documentation
printed xxvi
related xxvi
updates xxvi
Dynamic Group - Current Group Members page 198, 201
Dynamic Group - Potential Group Members page 198, 200
Dynamic Group - Security by Group page 198
Dynamic Group - Selection Criteria page 198
dynamic groups 189
See Also groups
creating 198
refreshing 201
setting up security 201
updating 198
viewing 200
viewing refreshed 201

E

earliest change date
determining period of interest 334
elapsed shifts 162
elapsed templates 409
Elapsed Time Attributes page 451, 454
elapsed time reporters
establishing 209
Elapsed Time Summary page (mobile) 655
ELM data display 650
email notification 40
Email Notification page 27, 40
Employee Selection Criteria grid
manager self service pages 587
Employee Self-Service Time and Labor
navigations 548
enabling absence prerequisites
Timesheet page 460
enrolling time reporters 203
compensation plans and 205
schedules and 205
Enterprise Performance Management
integration with 546
EPM, *See* Enterprise Performance Management
estimated costs 398
estimated gross
calculating with rules and 360
exception conditions 481
Exception Definition page 68
exception history
understanding 481
exception processing 362
exception reporting, workgroups and 80
exception resolution 480
exceptions 480, 481
See Also managing exceptions
Define Exception page 25
reporting 80
severities 69
understanding 25
validating time and 482
validations and 25
Exceptions Grid
Manage Exceptions page 485
Expression Text Sec Panel page 286
expressions
using in where clauses 296
extracting costs
after a pay run 512

F

flex shifts 162, 167
Forecasted Payable Time Summary page 579
Forecasted Time Detail page 603
Forecasted Time Details page 576
Forecasted Time Summary page 576, 603, 605
frozen date 388
frozen flag 388

G

Generating a Time Card report 753
Global Payroll 516
See Also integrating with Global Payroll
bundling payable time 519
effects from cancelling a pay run 519
integrating with 516
retroactive processing 519
selecting payable time 518
updating payable status 518
updating payable time after a pay run 520

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glossary 755
Group Creation Security page 191
Group Membership page 207, 215
group security 189
creating 190
row security permission lists and 191
groups 189
assigning schedules and 218
finding valid values 196
forming static 193
security and 225
time reporters and 215
understanding 189
viewing refreshed dynamic 201

H

HR tables
setting up for Time and Labor 17

I

implementing 3
PeopleSoft Mobile Agent 652
preparation 652
initializing
mobile time management 653
Insert Fields page 286, 289
integrate
Learning Management 649
integrating
steps to prepare data 508
steps to prepare for payroll 506
with Payroll for North America 508
integrating with Commitment Accounting
task data 542
integrating with Enterprise Performance Management 546
integrating with Global Payroll 516
analyzing your needs 517
preparing to run a payroll 516
work schedules and 175, 521
integrating with Mobile Time and Expense 543
enrolling time reporters 545
publishing TRCs 545
reporting time 544
retrieving time 546
setting up 545
synchronizing data 546
time collection devices 544
integrating with PeopleSoft Expenses
integration points 530
integrating with PeopleSoft Financials 527
integration points 527
overview 527
integrating with PeopleSoft Mobile Time and Expense
integration points 530
integrating with Performance Management
integration points 530
integrating with Project Costing 530
data published 532
estimated costs 535
Global Payroll 538
integration points 528
publishing estimated and actual costs 535
setting up 533
understanding 531
Integrating with Project Costing
Payroll for North America 537
integration points
PeopleSoft EPM 530
PeopleSoft Financials 527
publishing data to Time and Labor 428
Integration with payroll
Absence Management and Payroll for North America 522
integrations 2
configuring
Payroll for North America 507
Global Payroll 516
understanding flat file 428
interfacing
time reporting codes and 119
intermediate payable time 348
data stores and 349
loading tables 350
payable time and 365
structure 351
task profiles and 359
invalid punch order
creating exceptions using templates 257

L

labor distribution and dilution 503
pay runs and 503
Launch Pad page 551, 590

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Launch Pad pages 551, 590
overview 550, 589
Time and Labor Launch Pad - Details page 553
Time and Labor Launch Pad Select Employee page 589
Legend page – View Time, Daily, Weekly or Monthly Time Calendar 610
Load and Extract Processes
correcting errors 515
Load in Preliminary Calc
Installation table 508

M

Maintain Time Reporter Data page 207, 212
Manage Exceptions page 483, 485
manage schedule
copying 647
Scheduling replacements 646
swapping 648
Manage Schedule Display Options 637
Manage Schedule Display Options page 639
Manage Schedules – Daily Schedule Details page 638
Manage Schedules pages 638
manager calendar views
prerequisites 62
understanding 62
manager calendars
setting up 61
manager search defaults 40
Manager Search Defaults page 27
persistence of selection criteria 39
manager search options 39
Manager Search Options - Select Default Criteria and Options page 628
Manager Search Options page 628, 637
Manager Self Service
components 585
overview 585
Payable Time Summary page 603
Timesheet page 599
Manager Self-Service Time and Labor
navigations 588
managing exceptions
defining conditions 481
understanding the status 481
Managing Schedules page 640
managing time
overview 459
processing diagram 459
mass time reporting
Mass Time Reporting - Report Time page 572
Mass Time Reporting - Select Group Page 600
Mass Time Reporting - Select Time Reporting Method page 570
Mass Time Reporting - Report Time page 563, 572
Mass Time Reporting - Select Time Reporters page 596, 600
Mass Time Reporting - Select Time Reporting Method page 563, 570
Meta-SQL
using for rules 237
missing out punch
creating exceptions using templates 257
mobile time management
accessing from a laptop 653
accessing from a pocket PC 654
implementation 652
initialization 653
prerequisites 651
mobile time reporting
report elapsed time entries 655, 656
update elapsed time entries 655, 656
view elapsed time entries 655
view schedules 657
Monthly Schedule - Daily Detail page 551, 555
Monthly Schedule page 551, 554
Monthly Time Calendar page 610
Monthly Time Period page 44, 46

N

NA earnings codes
time reporting codes and 104
nested effective dates
changing 737
deleting rows 737
inactivating rows 737
understanding 737
notes xxix

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O

offsets
  rules and 363
online processing 229
  concurrent processes 19
  steps to process 229
online tools
  rules and 11, 228
Online Validations
  Timesheets 677
Override Reason Code page 74
Override Rules page 499
overtime
  balances and limits, viewing (managers) 619
  entering and viewing requests 579
  limits
    assigning to workgroups 52
    creating 49
    defining, example 51
  limits, viewing (managers) 619
  managing requests 616
  requests
    approving and denying multiple 620
    approving single 624
    entering (employees) 582
    viewing 617
    viewing (employees) 580
    viewing details (employees) 581
    viewing details (managers) 618
  transactions, understanding 580, 616
Overtime Limit page 49
Overtime Request Details (add) page
  Select Job Title page 580
Overtime Request Details (view) page
  Select Job Title page 580
Overtime Request Details page (view) 617
Overtime Requests page 580
Overtime TRC Value List page 49, 51

P

page
  employee 548
  time reporting 549, 588
paid time
  adjusting 487
pay system
  selecting 42
Pay System page 43
payable status 387
Payable Status page 403
Payable Status report 753
payable time
  actual costs and 398
  adjusting 513
  determining 341
  estimated payable time 398
  exception reporters and 342
  fields 399
  forecasted, viewing 579, 605
  formatting 365
  integrating with other applications 387
  intermediate payable time and 365
  overview 387
  periods and calendars and 57
  sources 344
  statuses 389
  updating 365
Payable Time Detail page 604
Payable Time Details page 576, 577, 603
Payable Time Status
  system settings as determinants 397
Payable Time Summary page 576, 603
paycheck reversal
  paycheck adjustment 512
payroll applications
  integrating with Time and Labor 501
Payroll for North America
  integrating with 507
payroll integration
  overview 501
payroll process
  running 511
payroll systems
  running with payable time 501
PC Business Unit page 149
PC Project Descr page 149, 150
PeopleBooks
  ordering xxvi
PeopleCode, typographical conventions xxviii
PeopleSoft Financials , *See* integrating with PeopleSoft Financials
PeopleSoft Human Resources
  configuring with Time and Labor 517
PeopleSoft Mobile Agent
  installation 652

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PeopleSoft Mobile Time and Expense, *See* integrating with Mobile Time and Expense
PeopleSoft Mobile Time Management
navigation 654
Performing Rounding, Task Distribution and Estimated Gross 356
period of interest 334
determining final 337
how used 339
pyramiding and 338
periods and calendars
building 53
creating payable time 57
defining instances 22
determining rule application 21
overview 44
types 20
using 20
permission lists 191
See Also row security permission lists, group security and
Personal Schedule Definition page 631
PNA check reversals
unconfirm and unsheet a payrun 538
positive reporting
workgroups and 80
post rules processing
rounding and 360
time validation and 361
prerequisites xxv
mobile time management 651
Preview Legend page 62, 65
printed documentation xxvi
prior periods
determining 21
processing
behind the scenes 735
referential integrity and 735
processing rules 356
Product page 146
Production Environment check box
Time and Labor Installation and 28
Program Detail page 311, 312
Program page 311
project codes
creating 146
task values and 146
Project Costing 530
See Also integrating with Project Costing
task reporting and 135
Project page 146
Publish Actual Payable Time page 539
Publish Estimated Payable Time page 539
Punch Pattern page 410, 413
punch shifts 162
punch templates 409
punch time reporters
establishing 209
Punched Time Error Attributes page 451, 456
punches, single, entering through the Web clock 568

R

rapid reporting templates
creating 415
field values 415
overrides and 418
Rapid Template page 416
rapid time reporting
overview 420
submitting data 420
validating data 420
Rapid Time Template page 416
reason code
payable time 387
reason codes 389
record-only adjustment 487
See Also adjusting time
referential integrity
and TRCs 741
areas it validates 735
changing effective dates and 736
example 739
nested effective dates and 737
task reporting and 743
task templates and 144
TCD interface and 748
time administration and 740
time reporter data and 213, 214
triggering 739
workgroups and 76
referential integrity check box 735
Refresh Dynamic Groups page 198, 201
regeneration of reported time
Mass Time Reporting 570
Rejected Payable Time status
Close check box 488
related documentation xxvi
relationship definitions

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rules and 244
Relationship Definitions page 245
Repeating Time Period page 44, 47
Report Rapid Time page 421
Report Time — Timesheet Summary page 596
Report Time page (mobile) 655, 656
Reported Time Audit - History page 493, 495
Reported Time Audit page 493
reporting time
overview 407, 561, 595
understanding 407
using rapid time entry 420
reports
Generating a Time Card report 753
overview 753
Payable Status report 753
Scheduled Hours Rpt 754
TCD Usage report 754
Request Batch Approval Process page 475, 479
request overtime
workflow 751
Request Overtime component
Select Job Title page 580
Submit Confirmation page 580
Request Time Administration page 371
resolving exceptions
Time Administration
understanding 482
retroactive processing
Global Payroll 519
Review Attendance Actions page 301, 304
Review Attendance History page 301, 304
Review Exceptions History page 483, 486
Review TCD Errors page 451
rounding options
understanding 83
workgroups and 81
Row Security Permission List page 223
row security permission lists
creating user access 221
group security and 191
setting up 222
understanding 221
Row Security Users page 226
Rule Element 1 through Rule Element 5 page 241
rule elements 230, 412
defining 237
using 237
rule maps 336
building 336
rule program
changing 99
creating with rules 311
modifying 231
prioritizing 239
rule steps
defining 307
rule templates
modifying 246
template descriptions 248
using to create rules 266
using to design rules 232
rules
actions and conditions and 228, 230
analyzing business rules 232
analyzing tips 232
copying 310
creating 227, 228
creating with templates 246
designing methodology 231
designing rule steps 232
Meta-SQL and 237
online tools 228
setting up 230
SQL and 229
steps to create 230
testing 240
translating business rules into SQL 232, 233
value lists and 235
working tables and 233
See Also working tables, rules and
rules processing 356
runtime statistics 374

S

Save Confirmation page 563
schedule
calendars 635
Schedule Calendar page 164, 631
schedule calendars
rotations 636

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Schedule Definition – Schedule Shifts page 164
Schedule Definition — Shifts page 172
Schedule Definition page 164, 169
Schedule Group page 164, 168
Schedule Preferences page 557, 559, 638
Schedule Replacement page 638
Schedule Shifts
  Schedule Shifts page 631
schedule, validating 175
Scheduled Hours page 638
Scheduled Hours Rpt 754
scheduled time sync message 650
schedules
  assigning to groups 218
  assigning to time reporter 205
  assigning, group 217
  importing third-party 176
  Manager Self Service, managing 630, 637
Schedules to be Validated page 175
scheduling 161
  definitions 163
  overview 9, 161
  shifts and 162
  understanding work schedules 161
  workdays and 163
security
  groups and 189
  row permission lists and 221
  Self Service, understanding 587
  setting up for static group 197
  setting up row permission security lists 222
  time managers and 221
security considerations
  Absence Management integration 522
Select Fields page 287, 294
Select Job Title page 563
Select Job Title page – Request Overtime 580
Select Tables - Expression Text page 287
Self Service
  Accumulators page 606
  components 547
  Details page 553
  Launch Pad page 551, 590
  mass time reporting 569, 600
  Mass Time Reporting - Select Group page 600
  Mass Time Reporting page 570
  overview 547
  Payable Time Summary page 576
  Report Time page 572
  roles, understanding 548, 587
  security, understanding 587
  setting up, user preferences 556
  Time and Labor Launch Pad Select Employee page 589
  time reporting, overview 561, 595
  Timesheet page 563
  user preferences page 557
  user preferences, schedule preferences page 559
  user preferences, send notification page 561
  user preferences, time reporting preferences page 557
Send Notification page 557, 561
Send Setup to TCD page 447
Shift Details 173
Shift page 164
shifts
  elapsed 162
  flex 162, 167
    See Also flex shifts
  punch 162
    See Also punch shifts
  scheduling and 162
SQL
  rules and methodology 231
SQL Bind Mapping page 287, 297
SQL Object page 287
SQL objects
  assembling to create rules 305
  components 285
  copying 297
  expression text and 289
  rules and 283, 284
  updating fields 290
SQL Objects - Expression Text page 286, 289
SQL Objects page 285
SQL statements
  user exits and 298
Static Group - Current Group Members page 193, 196
Static Group - Security by Group page 193, 197
Static Group - Selection Criteria page 193

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static groups 189
See Also groups
forming 193
setting up security 197
viewing members 196
Submit Confirmation page – Request Overtime 580
suggestions, submitting xxx
Swap Schedules page 638
synchronizing data
synchronization modes 657
synchronization process 658

T

TA Run-Time Stats: AE Sections page 376, 379
TA Run-Time Stats: Batches page 376, 379
Tables - Expression Text page 286
Tables page 286
Task page 146
Task Profile page 154
task profiles
allocating tasks 155
intermediate payable time and 359
overview 153
task reporting
defaults and 126
elements 569
interfacing with Project Costing 135
overview 123
referential integrity and 743
steps to create 137
types 125
understanding 123
Task Template page 140
task templates
modifying 144
overview 139
task values
creating activity codes 147
creating project codes 146
creating user fields 147
defining 128, 145
project codes and 146
prompt tables and 126, 148
understanding 126
viewing 145
where stored 128
Taskgroup 166
taskgroup borrowing
groups and 190
Taskgroup page 157
taskgroups
modifying 157
non-task reporting and 156
overview 156
TCD 425
See Also time collection devices
setting up 431
TCD Elapsed Time Errors page 451, 452
TCD Group page 432, 443
TCD Punched Time Errors page 451, 455
TCD Restriction Profile page 432, 441
TCD Setup page 432, 436
TCD Supervisor page 432, 441
TCD Taskgroup page 432, 439
TCD Type Definition page 432
TCD Usage report 754
Team Members page 149, 151
Template Header page 266
templates 246, 407
See Also reporting templates, overview; rules templates
rules and 246
terms 755
time
auditing 491
reporting 166
Timesheet page 563, 599
time administration 315
See Also batch processing
referential integrity and 740
rules and 227
understanding 227
Time Administration
control table 328
Time Administration Options page 376, 377
Time Administration Statistics page 376, 378
Time and Labor
configuring with PeopleSoft Human Resources 517
implementing 16
loading data into Payroll for North America 509
navigating 7
using workflow 751

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Time and Labor Launch Pad - Select Employee page 589
Time and Labor Launch Pad page 551, 589, 590
Time and Labor Launch Pad pages
overview 550, 589
time approval 462, 474
time calendars
daily, viewing 612
reported/payable time viewing options, defining 62
understanding 607
view criteria, selecting 610
viewing 608
weekly, viewing 614
Time Card Report page 421, 424
time collection devices
collecting data 450
communication settings 436
inactivating effective-dated rows 748
interfacing setup criteria 426
Mobile Time and Expense 544
publish and subscribe and 444, 449
referential integrity checks 748
reporting time and 407
tables of input data and 445
understanding 425
time history
auditing 492
time management
time, forecasted 605
time management features
overview 11
time period calendars
overview 53
time periods 45
See Also periods and calendars, overview
assigning to time reporter 210
offset days and 45
workgroups and 87
time plans
compensatory 24, 66
time reporter data
referential integrity and 213, 214
Time Reporter Status page 370
time reporter types 209
time reporters
assigning features 203
defining initial period of interest 333
enrolling 203, 205
enrolling in Time and Labor 203
payable time for positive 339
profiles, building 346
status 369
steps to process 329, 335, 336, 346, 347, 348, 356, 362, 365, 369
time reporting template and 210
using status in the selection process 330
viewing row security permission lists 226
time reporting
Accumulators page 606
managing time 575, 602
mass time reporting 569, 600
Mass Time Reporting - Select Group page 600
Mass Time Reporting page 570
Payable Time Summary page 576, 603
payable time, forecasted 579
Report Time page 572
self service, overview 561, 595
Timesheet page 563, 599
Timesheet Summary page 596
time reporting codes
in value list, viewing 51
rules and 235
time reporting codes (TRCs)
combining with earnings types 109
comp/leave time and 116
deleting a mapping 106
inactivating a mapping 106
mapping to earnings codes 104, 113
overview 101
PS Projects and 119
setting up examples 120
synchronizing with earnings codes 104
unsynchronizing from earnings code 106
time reporting elements
selecting on template 411
time reporting methods
overview 10
Time Reporting Preferences page 557
time reporting templates
assigning predefined 409
assigning to taskgroup 409
assigning to time reporter 210
assigning to time reporters 409
creating 409
overview 407

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task data and 409
time reporting, approving
Timesheet Summary page 462
Time Rptg Template page 410
time types
workgroups and 80
time zones
creating offsets 18
Timesheet page 462, 464, 563, 596
Apply Rules button 599
Timesheet Summary page 462, 596
TL Installation page 27
TL SQL Insert SecPNL page 286, 290
TL Template page 269
TL_TR_STATUS 328
TLX0010 validation
Submit Time process 73, 420
TLX00830 validation
Time Administration Referential Integrity 748
tracking methods for attendance 299
TRC, *See* time reporting codes
TRC 1 page 106, 107
TRC 2 page 106, 114
TRC Categories
defining 102
TRC Category page 102
TRC List page 62
TRC program
defining 117
TRC Program page 117
TRCs 101
See Also time reporting codes, overview
typographical conventions xxviii

U

understanding 480
Unit of Measure page 119
Unprocessed Payable Time 493
Unprocessed Reported Time 493
Update Fields page 286
updating payable time
after a pay run, Global Payroll 520
user exits 298
User Field 1 page 146
user fields
creating 147
task values and 147
user preferences
overview 12, 556
user preferences page 557
user preferences, schedule preferences page 559
user preferences, send notification page 561
user preferences, time reporting preferences page 557

V

validating time
post rules and 361
Validation Definition page 72
Validation Set Definition page 72, 73
validations
AE engine and 26
defining 26
Validations
weekly elapsed Timesheet 677
Value List page 240
View Business Unit PC page 149
View Business Unit PF page 149, 152
View Criteria page – View Time, Daily, Weekly or Monthly Time Calendar 609
View Details for All Employees link
Employees with Unprocessed Payable Time page 497
View Employee Overtime Requests page 617
View FS Activity page 149
View Overtime Balances page 617
View Project Activity page 149
View Project Resource Category page 149, 152
View Project Resource Sub Catg page 149
View Project Resource Type page 149, 151
View Schedule page (mobile) 657
View Time Period Calendar page 59, 61
View Time Reporter Comp Plans page 216, 217
View Time, Daily, Weekly or Monthly Time Calendar component
Legend page 610
View Criteria page 609
viewing refreshed dynamic groups 201
viewing schedules 657
visual cues xxix

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W

warnings xxix
Web Clock - Enter Punch page 563, 568
Web clock, single punches, entering 568
Weekly Time Calendar page 610
Weekly Time Period page 44, 46
Where Expressions page 287, 296
work schedules 161
Workday page 164, 169
workdays
  schedules and 163
workflow
  delivered with Time and Labor 751
  enabling 52
  request overtime 751
Workgroup page 49, 52, 78
workgroups
  changing a rule program 99
  day breaker options and 89
  example rounding options 83
  making transfers 97
  overtime limits, assigning 52
  overview 75
  rounding intervals 82
  rounding markers 82
  setting up 77
  time types 80
  understanding rounding options 81
working tables
  rules and 232
  understanding 242
Working Tables page 242

Z

zero hours
  exception time reporting 80

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