PeopleSoft Enterprise v9.1 Time and Labor

End User Training Guide

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Course Overview

Course Objectives
By the end of this course, you will be able to describe:
- Describe PeopleSoft Enterprise Time and Labor.
- Set up core human resources tables.
- Set up Time and Labor tables.

Agenda: Day 1
On day one, we will provide an overview of Time and Labor and discuss these topics:
- Business Process Overview
- Setting Up Basic Tables
- Creating Workgroups
- Building Schedules

Agenda: Day 2
On day two, we will provide an overview of Time and Labor and discuss these topics:
- Understanding Time Administration
- Managing Time
- Integrating with Payroll
- Using Self-Service
Chapter 1 - Business Process Overview

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

Time and Labor integrates with these PeopleSoft applications:

![Diagram showing integration between different PeopleSoft applications](image)

Time and Labor integrations with PeopleSoft applications

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

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.
**Understanding Time and Labor**

**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.

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.
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.
**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.
**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.

- **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.**
Chapter 2 - Setting Up Basic Tables

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

![Time and Labor Implementation Flow Diagram](image_url)
**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.

<table>
<thead>
<tr>
<th>Business Units</th>
<th>Used for task reporting in Time and Labor and to resolve Set ID for other fields.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set IDs</td>
<td>Used to resolve values for reporting on job code, location, and department by using the business unit.</td>
</tr>
<tr>
<td>Company</td>
<td>Used for task reporting in Time and Labor.</td>
</tr>
<tr>
<td>Location</td>
<td>Used for task reporting in Time and Labor.</td>
</tr>
<tr>
<td>Department</td>
<td>Used for task reporting in Time and Labor.</td>
</tr>
<tr>
<td>Job Code</td>
<td>Used for task reporting in Time and Labor.</td>
</tr>
<tr>
<td>Pay Group</td>
<td>Used in distribution to define parameters for payment of payable time.</td>
</tr>
<tr>
<td>Comp Rate Code Table</td>
<td>Used for elapsed time reporting with time reporting codes (TRCs).</td>
</tr>
<tr>
<td>Holiday Schedule</td>
<td>Used for scheduling and rule processing.</td>
</tr>
</tbody>
</table>

**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.

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:

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.
**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.

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.**
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.

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.
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:

<table>
<thead>
<tr>
<th>Begin Date</th>
<th>End Date</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1July</td>
<td>1July</td>
<td>Daily</td>
</tr>
<tr>
<td>1July</td>
<td>7July</td>
<td>Weekly</td>
</tr>
<tr>
<td>1July</td>
<td>30July</td>
<td>Monthly</td>
</tr>
<tr>
<td>1July</td>
<td>15July</td>
<td>Semi-Monthly</td>
</tr>
<tr>
<td>1July</td>
<td>31September</td>
<td>Quarterly</td>
</tr>
</tbody>
</table>

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, 1February2000 to 1February2001).

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

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

3. Define additional components.
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.
- 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.
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.
Setting Up System Defaults and Loading Dates

NAVIGATION: SET UP HRMS, INSTALL, PRODUCT AND COUNTRY SPECIFIC, TIME AND LABOR INSTALLATION, TIME AND LABOR INSTALLATION

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.

**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.

**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.
- 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 No Pay 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.
**TL/NA Payroll Options**

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

**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 an 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 Pay group Time with Current Pay group**

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

**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 checkbox if the Time and Labor Load process is never run concurrently.

**Concurrent Load Time and Labor Clean Up**

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 pay line has the OK to Paycheck 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.
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 process. The system delivered validation sets are ST_ALL, ST_TA and ST_SUBMIT.

Chartfield Validation

Select *Table Validation* for the system to validate Chart fields against the VALID_COMBO_TBL directly within HRMS.
Select *Sync Message* for the system to validate Chart fields by messaging the FMS database.

Select *None* for the system not to validate Chart fields.
**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.

**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.

**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.
- 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 work group’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.

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.
NAVIGATION: SET UP HRMS, INSTALL, PRODUCT AND COUNTRY SPECIFIC, TIME AND LABOR INSTALLATION, CONFIGURATIONS

Load Dates

Select Load Dates to enter years to populate a range of dates used for daily processing.

'Schedule Total Options:

- Include Breaks

'Schedule Resolution Options:

- Take Last Schedule Update

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

This field specifies how to resolve schedule changes. If the Take Last
**Options**

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 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

NAVIGATION: CLICK THE LOAD DATES LINK ON THE CONFIGURATIONS PAGE.

The Years field below will determine the range of dates populated into the Dates Table. The Dates Table is used by many functional areas including Scheduling and Time Reporting. The recommended value for the Years field below is 2. The value of 2 years will load the dates table from 2 years before the current date and 2 years after the current date, resulting in 4 total years.

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

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.

The Purpose of Load Dates

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

The first table is TLDATES_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.

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

NAVIGATION: SET UP HRMS, INSTALL, PRODUCT AND COUNTRY SPECIFIC, TIME AND LABOR INSTALLATION, MANAGER SEARCH DEFAULTS.

<table>
<thead>
<tr>
<th>Employee Selection Criteria</th>
<th>Include in Criteria</th>
<th>Include in List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group ID</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>EmpID</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Emp ID</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Last Name</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Business Unit</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Job Code</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Job Description</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Supervisor ID</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Reports To Position Number</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Location Code</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>North American Paygroup</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Global Payroll Paygroup</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Workgroup</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Taskgroup</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Position Number</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

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.
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.

Email Notification

NAVIGATION: SET UP HRMS, INSTALL, PRODUCT AND COUNTRY SPECIFIC, TIME AND LABOR INSTALLATION, EMAIL NOTIFICATION

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

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.)

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.

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.
Payroll System Options

NAVIGATION: SET UP HRMS, PRODUCT RELATED, TIME AND LABOR, TIME REPORTING, PAY SYSTEM, PAY SYSTEM

### Pay System

<table>
<thead>
<tr>
<th>Pay System:</th>
<th>NA</th>
</tr>
</thead>
</table>

### Payroll System Definition

- **Description:** North American
- **Short Description:** NA Pay
- **Labor Distribution Used**
- **Labor Dilution Used**

---

**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.
Chapter 3 - Establishing Time Periods and Plans

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

- Daily
- Weekly
- Monthly
- Complex
- Repeating

Establishing a Daily Time Period

NAVIGATION: SET UP HRMS, PRODUCT RELATED, TIME AND LABOR, TIME PERIODS, DAILY, DAILY TIME PERIOD

<table>
<thead>
<tr>
<th>Daily Time Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Period ID:</td>
</tr>
<tr>
<td>Period Definition</td>
</tr>
<tr>
<td>Description:</td>
</tr>
<tr>
<td>Short Description:</td>
</tr>
<tr>
<td>Period length in Days:</td>
</tr>
<tr>
<td>Days Offset from Period End:</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Offset Days Number</th>
<th>Original End Date of the First Period</th>
<th>New Instance Start Date for Next Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>January 24, 2006</td>
<td>January 25, 2006</td>
</tr>
<tr>
<td>2</td>
<td>January 24, 2006</td>
<td>January 26, 2006</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Offset Days Number</th>
<th>Begin and End Dates of the First Period</th>
<th>Begin and End Dates of the Next Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>−6</td>
<td>January 3-January 9, 2006</td>
<td>January 3-January 9, 2006</td>
</tr>
<tr>
<td>−5</td>
<td>January 3-January 9, 2006</td>
<td>January 4-January 10, 2006</td>
</tr>
<tr>
<td>−4</td>
<td>January 3-January 9, 2006</td>
<td>January 5-January 11, 2006</td>
</tr>
<tr>
<td>−3</td>
<td>January 3-January 9, 2006</td>
<td>January 6-January 12, 2006</td>
</tr>
</tbody>
</table>