



PeopleSoft v9.2 HCM Time & Labor Implementation Day 1

Presented by:
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Class Agenda Day 1

1. Course Overview
 - Agenda
2. Business Process Overview (Lesson 1)
 - Describing PeopleSoft Time & Labor as an Enterprise Wide Solution
 - Describing the PeopleSoft Time & Labor Application
 - Describing PeopleSoft Time & Labor Navigation
 - Describing Referential Integrity
 - Describing Sources of Information about PeopleSoft Time & Labor
3. Setting Up PeopleSoft Human Resources, Benefits, and Payroll for North America Tables (Lesson 2)
 - Identifying Prerequisite HCM Tables for Time & Labor
 - Defining Prerequisite Human Resources Tables
 - Defining Prerequisite Benefits Tables
 - Defining Prerequisite Payroll for North America Tables
 - Setting up Holiday Schedules
 - Setting up Earnings Codes and Program
 - Setting up Pay Groups and Pay Calendars

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4. Setting Up Basic Time & Labor Tables (Lesson 3)
 - Describing Time & Labor Setup Tables
 - Setting up Time Zone Offsets
 - Setting Up the Time & Labor Installation Table
 - Setting up Manager Time Calendar View Options
 - Selecting the Labor Distribution and Labor Dilution Options
5. Establishing Time Reporting Codes (Lesson 4)
 - Describing Time Reporting Codes
 - Defining Time Reporting Code Categories
 - Establishing Time Reporting Codes
 - Defining TRC Programs
 - Defining Compensatory Time Off Plans
 - Defining Override Reason Codes
6. Establishing Time Periods (Lesson 5)
 - Describing Time Periods
 - Establishing Time Periods
7. Establishing Planned Overtime (Lesson 6)
 - Describing Planned Overtime Features
 - Establishing Planned Overtime

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- 8. Creating Workgroups (Lesson 7)
 - Describing Key Workgroup Concepts
 - Creating Workgroups
- 9. Defining Template Built Rules (Lesson 8)
 - Identifying Online Rule Definition Tools
 - Identifying Steps to Define Rules
 - Defining Rule Programs
 - Exporting and Importing Rules

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10. Creating Task Groups (Lesson 9)

- Identifying Task Functionality Concepts
- Creating Task Templates
- Creating Task Profiles
- Creating Taskgroups
- Describing Task Profile Reporting Procedure

11. Building Schedules (Lesson 10)

- Identify Scheduling Concepts
- Describing Scheduling Integrations
- Identifying the Steps to Create a Schedule
- Setting Up Schedules
- Validating Schedules

12. Setting Up Time Reporters (Lesson 11)

- Creating Time Reporter Data
- Maintaining Time Reporter Data
- Assigning Time Reporters to a Schedule
- Assigning and Viewing Compensatory Time Off Plans

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- 13. Setting Up Groups and Security (Lesson 12)
 - Describing PeopleSoft Time & Labor Groups & Security
 - Setting Up Group Creation Security
 - Setting Up Dynamic Groups
 - Setting Up Static Groups
 - Viewing Time Reporters in Groups
 - Setting Up Group Security
- 14. Reporting Time Using Rapid Entry (Lesson 13)
 - Describing Time Reporting
 - Establishing Rapid Time Templates
 - Perform Rapid Entry
- 15. Running the Time Administration Process (Lesson 14)
 - Describing the Time Administration Process
 - Describing Time Reporter and Payable Time Status

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16. Reporting Time Using Self Service (Lesson 15)

- Identify Time Reporting
- Defining Time Reporting Templates
- Defining User Preferences
- Reporting Time using Timesheets
- Reporting Time using the Web Clock
- Reporting Time using Mass Time Reporting
- Request Overtime
- Request an Absence

17. Managing Exceptions (Lesson 16)

- Defining Exceptions
- Managing Exceptions



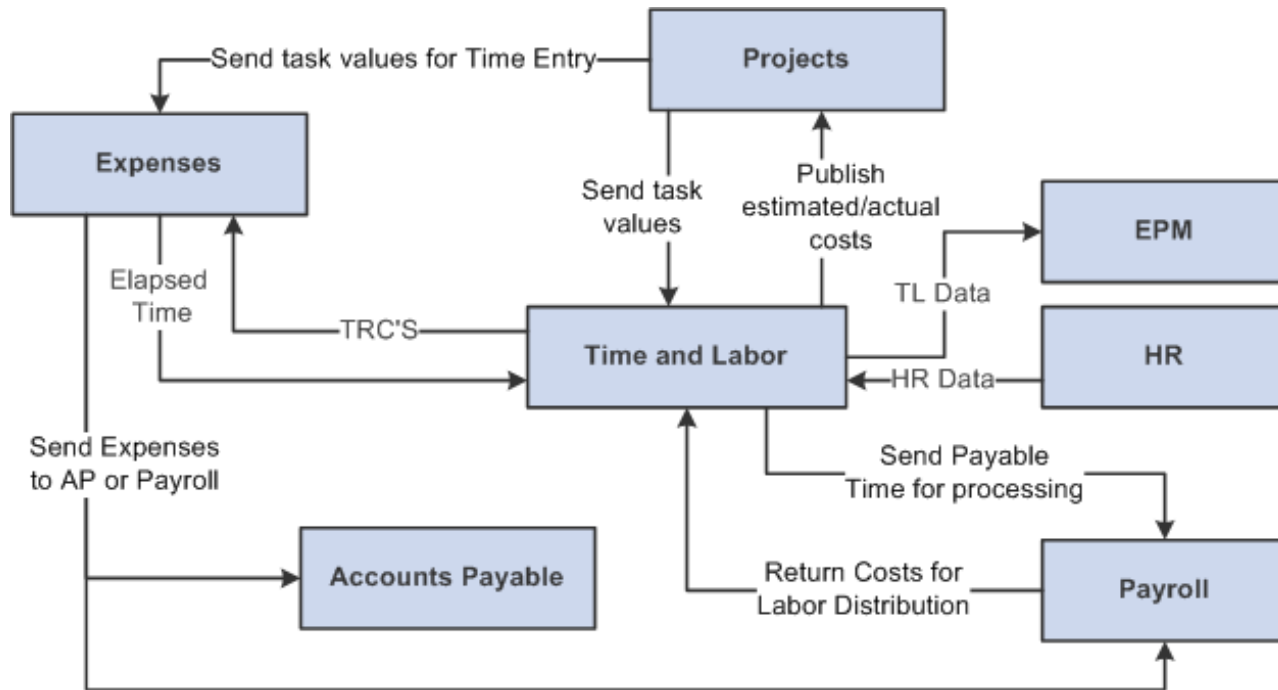
Business Process Overview (Lesson 1)

Business Process Definition

- A business process is a group of related tasks that serve a specific service or a particular goal
- Business processes can be modeled through a large number of methods and techniques. Business processes often can be visualized with a flowchart as a sequence of activities with intersecting decision points
- PeopleSoft Menu Groups define the boundaries of each major business process

PeopleSoft Time & Labor as an Enterprise Wide Solution

- PeopleSoft is an Enterprise Wide Solution, that integrates seamlessly with other PeopleSoft applications

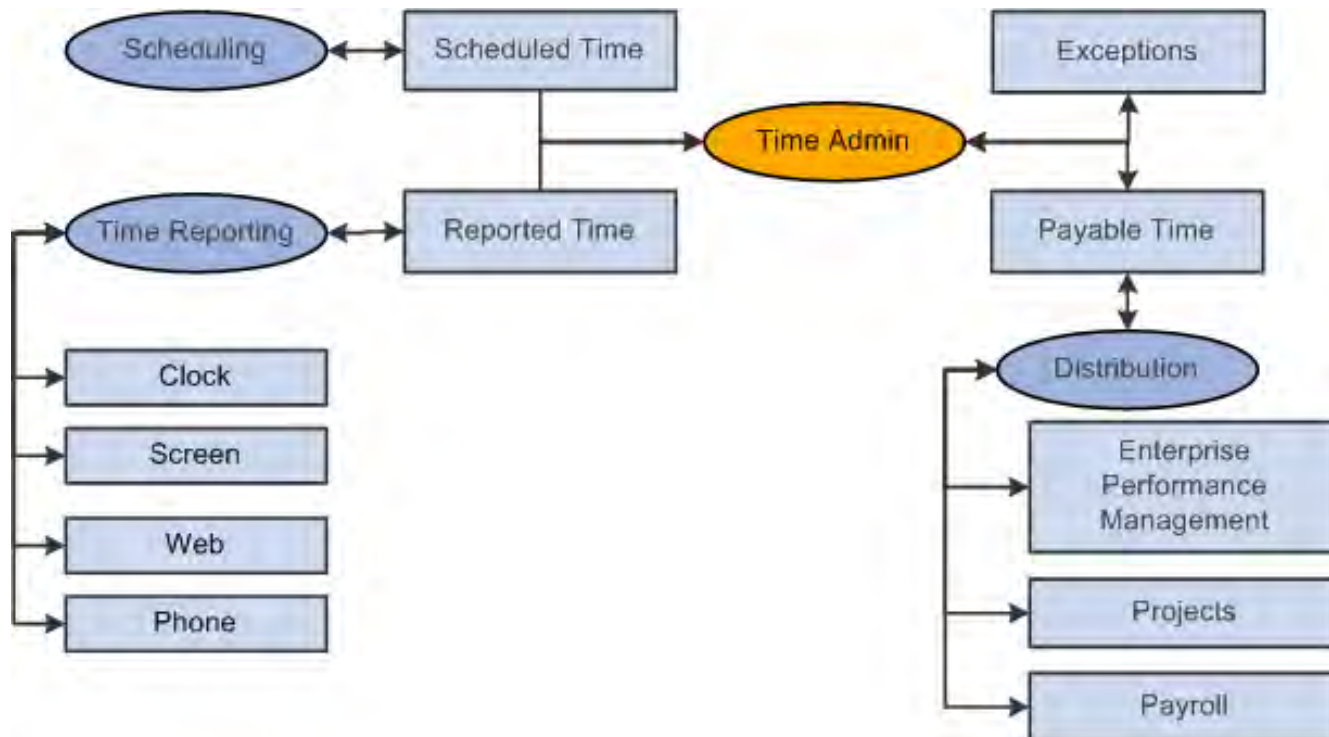


PeopleSoft Time & Labor as an Enterprise Wide Solution, continued

- The following integrations occur between Time & Labor and other PeopleSoft modules
 - Time & Labor information can be assigned through the hire process
 - PeopleSoft Expenses (Financials) integrates with Time & Labor to transmit reported time
 - Time & Labor data can be loaded into PeopleSoft Payroll for North America
 - Labor Distribution data is transmitted from PeopleSoft Payroll for North America back to Time & Labor
 - Shared tables in PeopleSoft Projects and Enterprise Performance Management are kept in sync through application messaging

PeopleSoft Time & Labor

- The diagram below explains the major business processes and functionality of Time & Labor



PeopleSoft Time & Labor, continued

- Scheduling

- All Exception time reporters must have a schedule assigned. The system uses these schedules to generate their time. S
- Schedules are not required for positive time reporters, but are useful for schedule balancing and manager visibility reasons

- Time Reporting

- Positive time reporters must report ALL of their time to be paid
- Exception time reporters users only need to report exceptions to their schedule, such as vacation, sick, and overtime

PeopleSoft Time & Labor, continued

- Time Administration

- Applies all rules and validates reported time
- Reported and scheduled time create payable time
- Exceptions are created – some may be resolved while others serve as a warning/alert

- Distribution

- Distribution is where payable time is sent to payroll for processing and then sent back to Time & Labor to be distributed to Projects and EPM

PeopleSoft Time & Labor Navigation

Key Time & Labor navigation paths include:

Path	Function
Home > Setup HRMS > Product Related > Time & Labor	Time & Labor setup pages
Home > Setup HRMS > Install > Product & Country Specific	Time & Labor Installation Table
Home > Setup HRMS > Security > Time & Labor Security	Time & Labor specific security setup
Home > Time & Labor	Report and manage time and schedules
Home > Self Service > Time Reporting	Employees can view and report time, schedules, and balance information
Home > Manager Self Service > Time Management	Managers can view and manage schedules, view and approved time, absences, overtime requests, exceptions, and more

Referential Integrity

- PeopleSoft Time & Labor contains a process called Referential Integrity (RI). It can be activated by selecting the 'In Production' check box on the TL Installation Options page. The RI process:
 - Checks for retroactive changes to effective-dated setup data or employee-related data and determines the effect on reported or payable time for affected employees
 - Validates time during Time Administration
 - Creates or resolves exceptions during the Time Administration process
 - Updates TR status records to reevaluate payable time
 - When you are processing data through PeopleSoft Enterprise Time and Labor, RI evaluates changes and reevaluates affected time.
 - Does not allow the inactivation or deletion of certain records or the change of effective-dated rows

Sources of Information – Time & Labor


- You can use the PeopleSoft Time & Labor PeopleBooks as a resource for implementation and business process information. Key sections include:

Location/Chapter	Description
Getting Started	The "Getting Started" chapters contain: <ul style="list-style-type: none">• General information about PeopleSoft Setup Manager• A list of component interface exists that can be used with the Excel to Component Interface utility
Navigation	These chapters discusses the custom navigation pages that are delivered with PeopleSoft Time and Labor
Implementation	These chapters discuss implementation concepts and tasks such as Setting up Basic Tables, Establishing Workgroups, Establishing Time Reporting Codes, Defining Task Reporting Requirements, Defining Work Schedules, Establishing Static and Dynamic Groups, Setting Up Time Reporters, Establishing Time and Labor Security, and Creating Rules in Time Administration

Sources of Information – Time & Labor, continued

- You can use the PeopleSoft Time & Labor PeopleBooks as a resource for implementation and business process information. Key sections include:

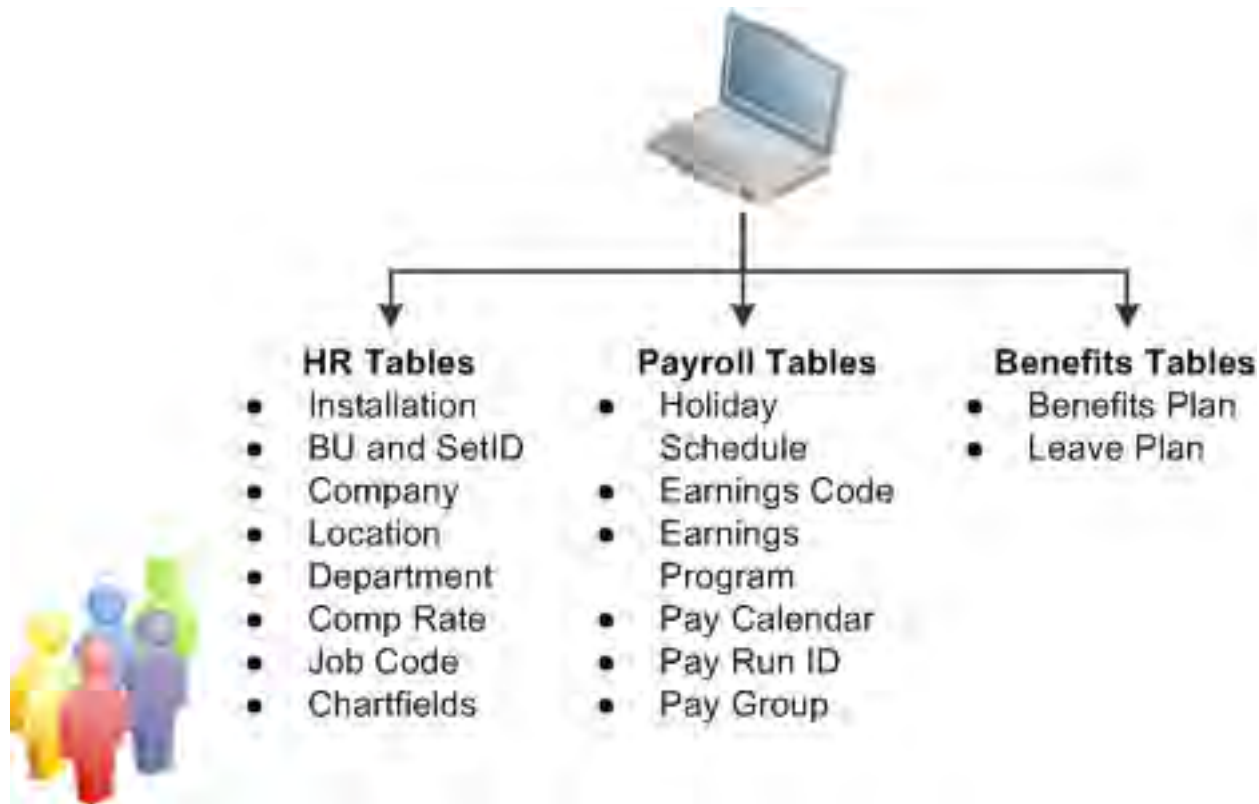
Location/Chapter	Description
Business Process	The chapters that follow the implementation chapters discuss business process considerations that are helpful to both implementers and power users
Appendix/Reports Samples	The appendixes provide reference information about the reports and workflows that are delivered with the system. Samples of reports appear at the end of the appendixes



Setting Up PeopleSoft Human Resources, Benefits, and Payroll for North America (Lesson 2)

Prerequisite HCM Tables for Time & Labor

- Specific core HR tables must be populated before you can begin setting up Time & Labor



Prerequisite HCM Tables for Time & Labor, continued

- Core HCM Tables and how Time & Labor uses them:

Table	Purpose
HR Installation Table	Used to enable products, and set options that are used across the HRMS product line
Business Unit	Cost allocation and as search criteria for the creation of groups
SetID, Company, Location, Department	Cost allocation and as search criteria for the creation of groups
Compensation Rate	Used for elapsed time reporting with time reporting codes (TRCs)
Job Code	Used by Time and Labor for cost allocation and as search criteria for the creation of groups
Chartfields	Used to integrate with PeopleSoft Enterprise Financials



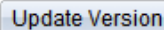
Prerequisite Human Resources Tables

- Installation Table

- The Product Specific tab on the Installation Table defines options specific to a product

- Navigation: Home > Install > Installation Table > Product Specific

Products HRMS Options **Product Specific** Country Specific Last ID Assigned Third Party/System Alternate Character

Benefits Functions <ul style="list-style-type: none"><input type="checkbox"/> FMLA Administration<input type="checkbox"/> COBRA Administration<input type="checkbox"/> Benefits Billing<input checked="" type="checkbox"/> Retroactive Benefits/Deduction<input checked="" type="checkbox"/> FSA Claims Administration Start Date for BenAdmin: 01/01/1999  Benefits Deduction Class Order <ul style="list-style-type: none"><input checked="" type="radio"/> EE After Tax Then PTax Benefit<input type="radio"/> PTax Benefit Then EE After Tax	NA Payroll / Payroll Interface <ul style="list-style-type: none"><input type="checkbox"/> Concurrent Calc/Confirm<input checked="" type="checkbox"/> Automatic Employee Tax Data<input checked="" type="checkbox"/> Use State Residence for Local T&L / NA Payroll Paysheet Opt <ul style="list-style-type: none"><input type="checkbox"/> Change Final Check<input type="checkbox"/> Change Online Check<input type="checkbox"/> Change Reversal Adjustments<input checked="" type="checkbox"/> Load in Preliminary Calc	Human Resources <ul style="list-style-type: none"><input checked="" type="checkbox"/> Multi-Company Organization<input type="checkbox"/> Automatic Job Termination<input type="checkbox"/> Automatic Job Suspension 'Temporary SSN' Mask: 999 Empl ID Field Length: 4
Federal Functionality <ul style="list-style-type: none">*Default Pay Basis: Per Annum <input type="checkbox"/> NFC Indicator	AP Invoice Number Prefix AP Inv Prefix: H	General Ledger GL Version: N/A 
	Commitment Accounting <ul style="list-style-type: none"><input checked="" type="checkbox"/> Encumbrance Trigger<input type="checkbox"/> Comm Control Budget Processor<input type="checkbox"/> Enforce Real Time Budget Check	Combination Editing Caching <ul style="list-style-type: none"><input type="checkbox"/> Cache ValidationsCache Retention Days: 0

Prerequisite Human Resources Tables

- Installation Table, continued

- To implement Time & Labor, you will need to make sure you address the following settings:

- On the Products Tab, ensure that the Time & Labor checkbox is selected
 - On the Product Specific Tab, the only setting specific to Time & Labor is the “Load in Preliminary Calc”. Selecting this setting allows the Pre-Calculation Process in Payroll to load any payable time from Time & Labor that has been approved, instead of using the “Load Time & Labor” process

Prerequisite Human Resources Tables

- TableSet Control

- The system uses setIDs to resolve job code, location, and department values in Time & Labor

- Navigation: Home > PeopleTools > Utilities > Administration > TableSet IDs, TableSet Control

TableSet ID

Set ID:	SHARE
Description:	<input type="text" value="Table Set shared across Corp"/>
Short Description:	<input type="text" value="Share"/>
Comments:	<input type="text"/>

When you set up a task template, you must select a business unit if the job code, location, or department has been selected. If you are using a task template that includes a business unit and department, the system enables you to only select departments that have the same SetID as the business unit.

Prerequisite Human Resources Tables

- Business Unit

- The system uses the Business Unit as a distributed task field that allows you to allocate costs across different divisions, report time to different divisions for any given day, allocate individual rows of time to the appropriate divisions, and establish Time & Labor groups

- Navigation: Home > Setup HRMS > Foundation Tables > Organization > Business Unit > Business Unit

Business Unit Business Unit Reference

Business Unit: US006

***Status:**

***Description:**

Short Description:

Default Record Group Set IDs

Set ID:	<input type="text" value="SHARE"/>	Table Set shared across Corp
OR		
Clone from Existing Business Unit:	<input type="text"/>	

Prerequisite Human Resources Tables

- Company
 - The company table stores information about each company within your organization – from the corporate address to general ledger account and processing information
 - Navigation: Home > Setup HRMS > Foundation Tables > Organization > Company

Prerequisite Human Resources Tables

- Company, continued

Company Location Default Settings Phones Rules Definition

Company: GBI

Location Find First 1 of 1 Last

*Effective Date: 01/01/2006 *Status: Active Go To Row

*Description: Global Business Institute 9999

Short Descr: GBI

Location Set ID: SHARE Table Set shared across Corp

Location: KUNY00 Corporation Headquarters

*Default Set ID: SHARE Table Set shared across Corp

Legal Entity:

Country: USA United States

Address: 500 George Washington Pkway Edit Address
New York, NY 07666

Email Addresses Customize | Find | View All | First 1 of 1 Last

*Address Type	*Email Address		
1	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Belgium

Japan

Prerequisite Human Resources Tables

- Location

- Time & Labor uses the values contained in the Location table for building groups and task reporting
 - Navigation: Home > Setup HRMS > Foundation Tables > Organization > Location

Location Address Location Profile

Set ID: SHARE Location Code: KUOH00 [Business Units that use this Set ID](#)

Location Address Find | View All First 1 of 1 Last

*Effective Date:	01/01/1980	*Status:	Active
*Description:	Ohio Operations	Short Description:	OH Oper
Building:	3000	Floor Nbr:	
Country:	USA United States	Language Code:	English
Address:	500 Buckeye Plaza Drive Columbus, OH 67889		

[Phone](#) [Edit Address](#)

Prerequisite Human Resources Tables

- Departments
 - Time & Labor uses departments as cost centers, you can also use departments for labor cost allocation
 - Departments can also be used in Time and Labor group creation. They also become the default security in Time and Labor if group security is not selected
 - Navigation: Home > Setup HRMS > Foundation Tables > Organization > Department

Prerequisite Human Resources Tables

- Departments

Department Profile **Comm. Acctg. and EG**

Set ID: SHARE Department: 60000 [Business Units that use this Set ID](#)

Department Profile Find | View All First 1 of 1 Last

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

*Description: Quality Assurance Short Description: QA

Location Set ID: SHARE Table Set shared across Corp

Location: KUOH00 Ohio Operations

Company: GBI Global Business Institute 9999

Manager Type

None

EmpID Manager ID:

Position Manager Position:

Empl ID:

Budget Year End Date: *Budget Level: Department

Payroll for North America

Tax Location:

▾ Belgium

▾ Canada

▾ Germany

▾ France

▾ USA

▾ New Zealand

▾ Australia

▾ Mexico

▾ Argentina