State Of Oklahoma CORE Project

Course P106

Time and Labor Training Manual

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MAXIMUS ERP Solutions

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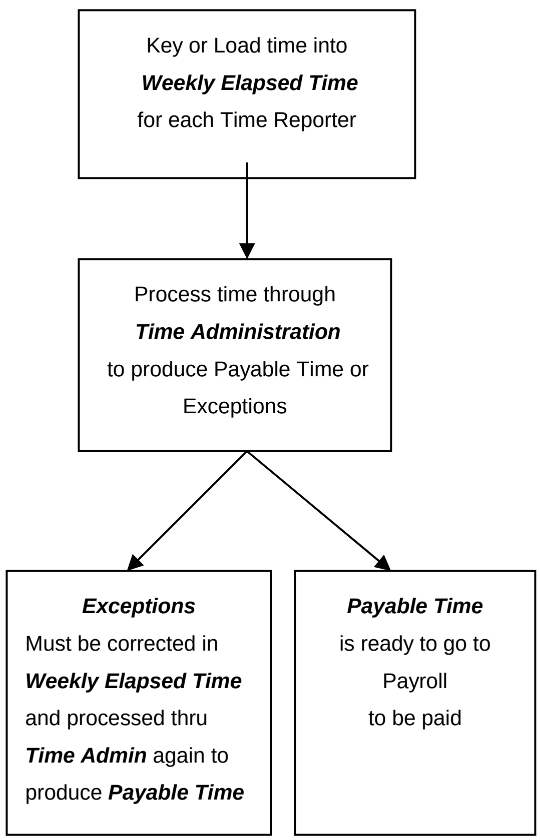
TIME AND LABOR TRAINING MANUAL

TIME AND LABOR

BUSINESS PROCESS FLOW

Self Service > Manager > Tasks > Weekly Elapsed Time

All Employees are Time Reporters.



Administer Workforce > Capture Time and Labor > Process > Time Administration

Time Admin takes in Weekly Elapsed Time, validates it and produces either Payable Time or Exceptions.

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Self Service > Manager > View > Manage Group Exceptions

Self Service > Manager > View > Payable Time Detail

Only Payable Time can be sent to Payroll.

Exceptions must be cleared.

TIME AND LABOR CONCEPTS

PeopleSoft Time and Labor is a software application with many features and functions that are integrated with the other PeopleSoft application (Human Resources, Base Benefits and North American Payroll) being implemented at the State of Oklahoma. This training documentation will cover only those functions currently implemented.

This training manual does not cover all possible scenarios you may encounter while using PeopleSoft Time & Labor. However, it does cover the most frequently encountered scenarios.

TERMINOLOGY

You will encounter several new terms as you work with PeopleSoft Time and Labor and the PeopleSoft system. Below are the terms and their definitions:

Weekly Elapsed Time – is an input screen into which you key or load time worked and/or time taken off for each employee.

For people on Salary, you would enter only the exceptions because the system automatically generates the entry to pay these employees for the whole month's work.

An example of exception time would be employee Joe Blow took off 8 hours sick on February 3. You must enter the correct ***TRC*** for sick time (***SCKTK***) and the number of hours taken on this page so that the system will move the 8 hours from the Regular Earnings category to the Sick Time category and reduce the employee's sick time balance available.

For hourly and temporary employees, you must key or load in the hours worked into Weekly Elapsed Time in order for them to get a paycheck. The system does not enter anything automatically for these types of employees.

NOTE: This page is always ***LIVE*** and can be changed at any time in the future.
The entries in it always stay there and the system knows which ones have already been paid and which ones are new entries that need to be paid.

Time Administration – The batch program that takes time entered into Weekly Elapsed Time and validates it against pre-established rules and produces Payable Time if the time does not violate any of these rules. If the time entered violates a rule, the ***system will not produce payable time for that time entry***. It also puts the time in violation of the rules into the Exceptions File and will not allow that entry to go any further until the exception has been cleared up. ***The employee will not be paid for this time until the exception on it is cleared.***

Payable Time – Time that has been processed through the Time Administration batch program. Payable Time can be pulled into Payroll for processing. ***Only payable time can be sent over to payroll.***

Time & Labor Exceptions – an unusual condition. It could be an error and must be checked out because the time that has the exception is hung up until the exception is cleared. The employee cannot be paid for time that is flagged as an exception until that exception is cleared.

Time Reporter – Any employee that has time processed through Time and Labor. Every employee must be a time reporter to have time processed by Time Administration.

Time Reporting Code (TRC) – A code that designates the type of work performed, leave time or other type of time that needs to be processed through Time and Labor. Each agency will have several (usually 100+) TRCs for entering time. Examples are: LWOPS (Leave without Pay Scheduled), OTSTR (Overtime Straight), JURY (Jury Duty), SCKTK (Sick Time Taken), and ANNLV (Annual Leave Taken).

Time Reporting Code Program (TRC Program) – Time Reporting Codes are grouped together into Time Reporting Code Programs so agencies will only see TRCs relevant to them when entering time for an employee. The naming convention for TRC Programs has been defined as: 3 character agency + 01. Therefore, the TRC Program for Department of Mental Health is 45201. All agencies that have hourly/temp employees will use the TRC Program of HRLY.

Workgroup – A group of employees that use similar data within the Time and Labor application. Most agencies will have two Workgroups – one for salaried employees and one for hourly/temporary employees.

For example, all salaried employees for Office of State Finance will use the same set of Time Reporting Codes. These may be different than the Time Reporting Codes for another agency. The naming convention for workgroups is: 3 character agency + “00” + “-01” (for salaried) or “-02” (for hourly). Therefore, the Workgroup for Office of State Finance for Salaried employees is 09000-01 and the Hourly employees workgroup is 09000-02.

SCOPE

Now that we have some of the terminology down, let's discuss what will be in scope for this phase of the implementation.

- Ability to enter and report on time that is entered by type of work performed. Meaningful reports can be generated for an agency to report across their employee base and get an understanding of how much Leave Without Pay is taken or how much Overtime is worked for example.

- Various leave plans like Organizational and Military Leave, in addition to Compensatory Time Off plans have been established. The plans have been created to automatically have time expire when it is supposed to and not allow accumulation of more time than is allowed.

- Seamless integration with PeopleSoft HRMS. Employees are hired in HRMS and are available for enrollment into Time and Labor. There is no need to enter any additional job related information like salary, department or location.

- Seamless integration into PeopleSoft Payroll. Data is entered once and the Payroll processes it as needed.

- Seamless integration with Base Benefits. Time and Labor does a check at time of entry to ensure an employee has enough annual, sick or comp leave before the time entry page can even be saved.

CONFIGURATION

To understand how transactions are processed through Time and Labor, it's important to understand how the system was configured. Each of the following sections indicates a part of the configuration. It will all be tied together at the end of the section.

Time Reporting Code – Time Reporting Codes are the level at which time is recorded. An example of a Time Reporting Code is LWOPS – Leave Without Pay, Scheduled. If an employee takes Scheduled Leave without pay, you will enter the number of hours that should be applied to this Time Reporting Code.

Time Reporting Codes are:

- Mapped to a Payroll Earnings Code to determine how this time will affect an employee's pay, benefit accruals or other accumulators.
- Designated as having an impact on Compensatory Time Plans, if appropriate.
- Used for reporting purposes to determine trends or summary in type of work performed.

The naming convention for Time Reporting Codes is to use up to five characters that describe the code as best as possible (i.e. LWOPS = Leave Without Pay – Scheduled).

Time Reporting Code Programs – Time Reporting Codes are grouped together in Time Reporting Code Programs by agency.

A Time Reporting Code is assigned at the Workgroup level (covered later). This is helpful during time entry. Rather than seeing all the Time Reporting Codes defined for all agencies, only Time Reporting Codes relevant to your agency will be available for entry. An example of a Time Reporting Code Program is 54801.

Each agency will have at least one Time Reporting Code Program for their full-time, salaried employees. If they have part-time, temporary employees they will have a second Time Reporting Code Program (HRLY).

The naming convention for Time Reporting Code Programs is:

- First three characters are the agency number
- The last two characters are either "01" for full-time, salaried employees (80501) or "02" for special processing.
- HRLY for part-time, temporary employees.

Therefore, Rehabilitation services will have two Time Reporting Code Programs (80501 and HRLY).

Compensatory Time Off Plans – There are several Compensatory Time Plans that have been setup in Time and Labor. These plans have balances updated based on Time Reporting Codes entered for an employees time. For example, an employee currently has a Compensatory Time Balance of 20 hours.

This week we enter 8 hours using a Time Reporting Code that adds to the Compensatory Time Balance. The next time we process that time, the balance will get updated to 28 hours.

Comp Time Data is all handled in Time & Labor – including the comp time balances.

Annual Leave and Sick Leave Plans are accrual-type plans. They are tracked in Base Benefits. The accrual process for these plans is run after all the payrolls for a given month are finished. These plans have to be ***processed through a payroll before they can update the balances in Base Benefits.***

During the conversion process employees were enrolled in the same plans available to them in the legacy system and their balances were converted.

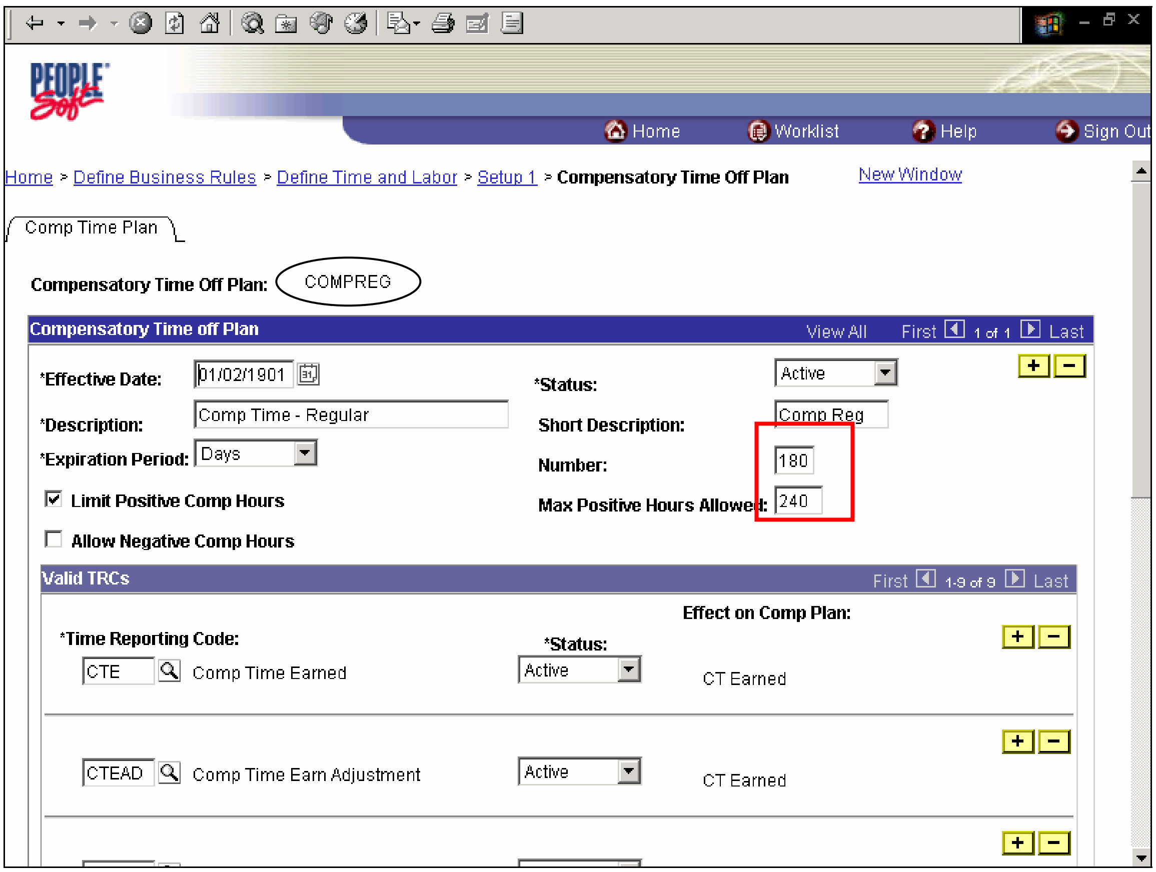
In Time and Labor, the following plans have been established:

- COMPCORE – Comp Core Project
- COMPPUB – Compensatory Time Plan for Public Safety
- COMPREG – Compensatory Time Plan for All others
- COOLOFF – Administrative Leave, Cool Off – (32 hours)
- ENFORCED – Enforced Leave – (80 hours)
- HOLIDAY – Holiday Leave
- MILITARY – Military Leave – (240 hours)
- ORG – Organizational Leave – (24 hours)
- SHARED – Shared Leave
- SHLFTERM – Shared Lifetime Leave for Terminally Ill – (2920 hours which is 365 days)
- SHLFNOTERM – Shared Lifetime Leave for Non-Terminally Ill – (2088 hours which is 261 days)

Defining a Compensatory Time Off Plan

Compensatory Time Plans have been established with limits and expirations as defined in the merit rules.

Define Business Rules > Define Time and Labor > Setup 1 > Compensatory Time Off Plan

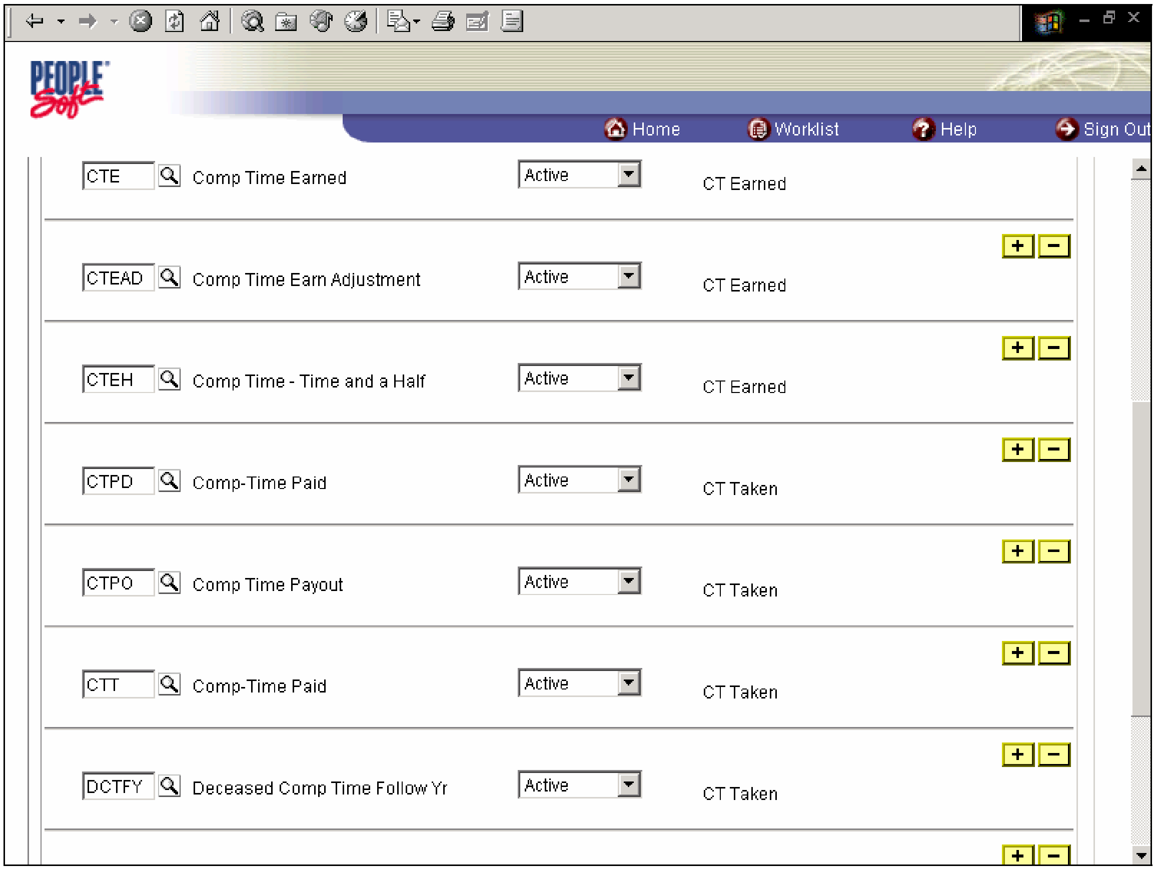


In the screen print above, notice that a Compensatory Time Plan has been established called – COMPREG. It says that Comp Time will expire in 180 days if not taken. It also indicates that a person can only accumulate a maximum of 240 hours.

Note: Time is accumulated and taken on a first in, first out basis.

The Time reporting Codes (TRCs) that update the Comp Plan Balance Record are shown on the next page.

The bottom portion of the page shows the Time Reporting Codes that affect the balance.

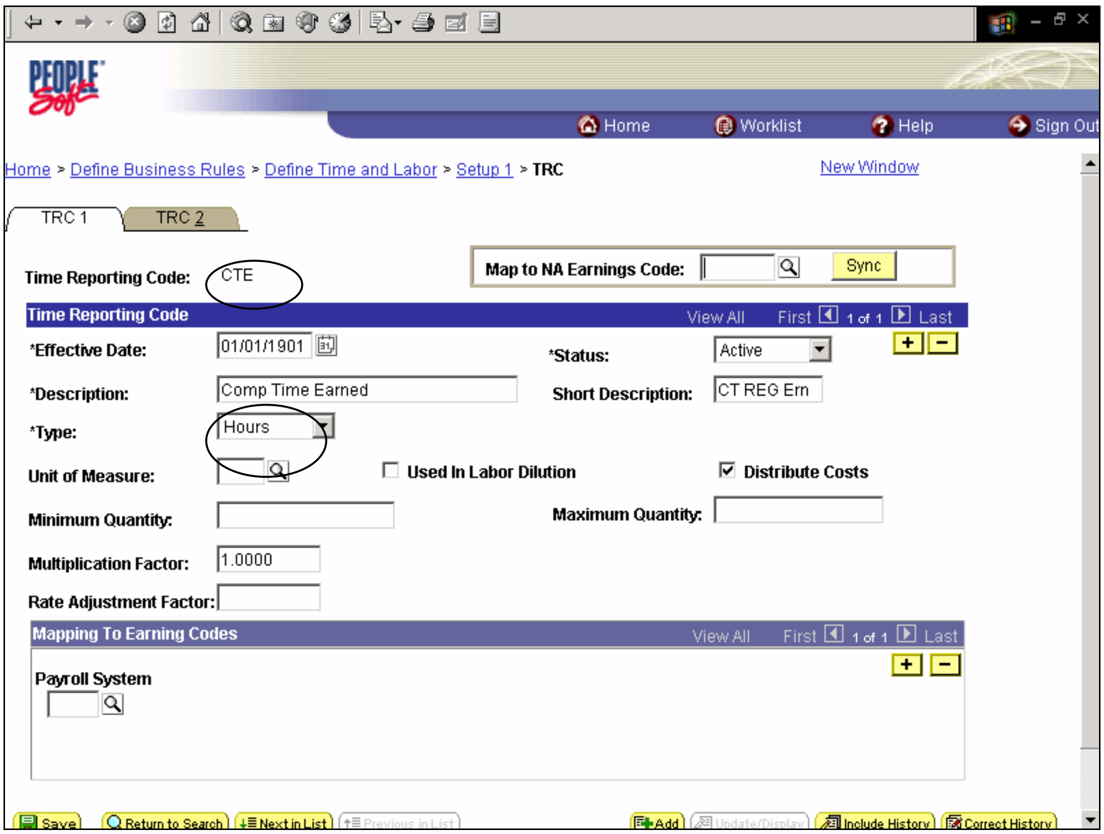


Defining a Time Reporting Code (TRC)

The time reporting code for Comp Time Earned is CTE. The definition pages are shown below.

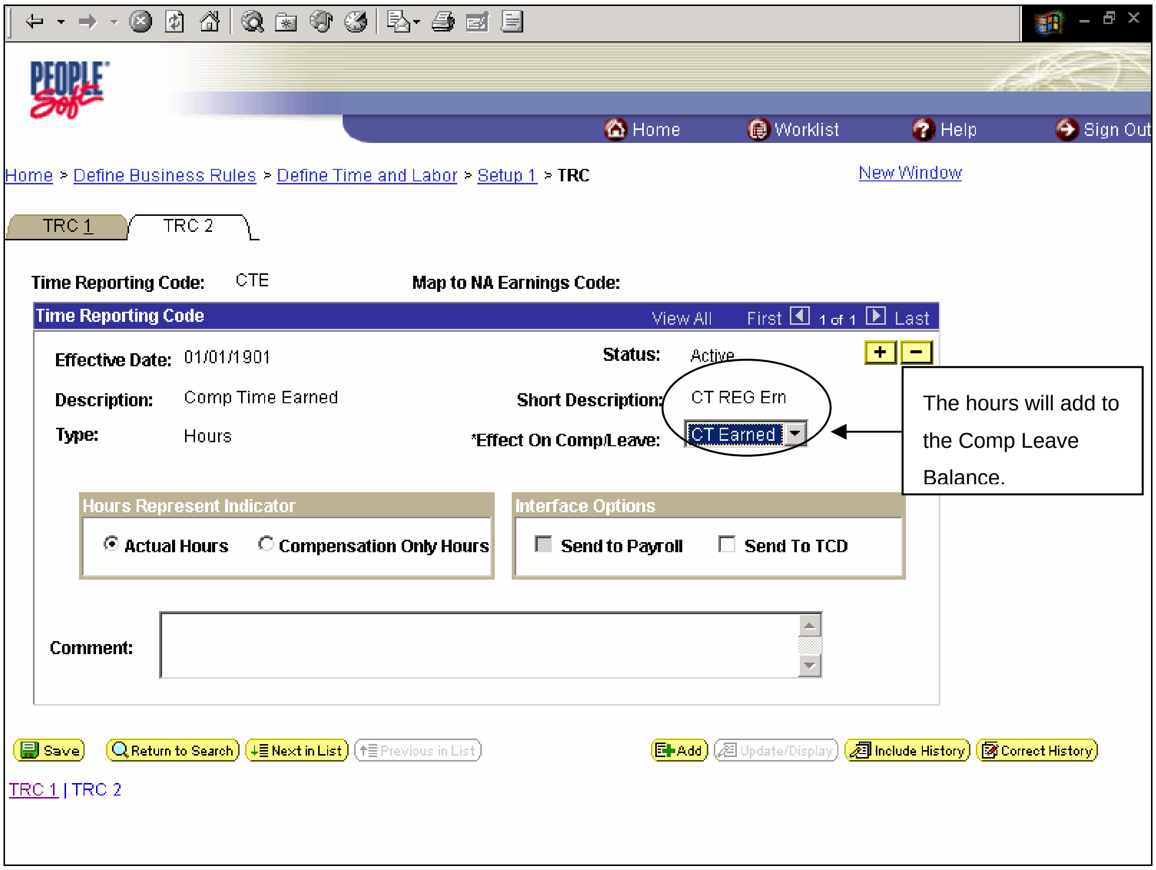
Define Business Rules > Define Time and Labor > Setup 1 > TRC

CTE Definition - TRC1



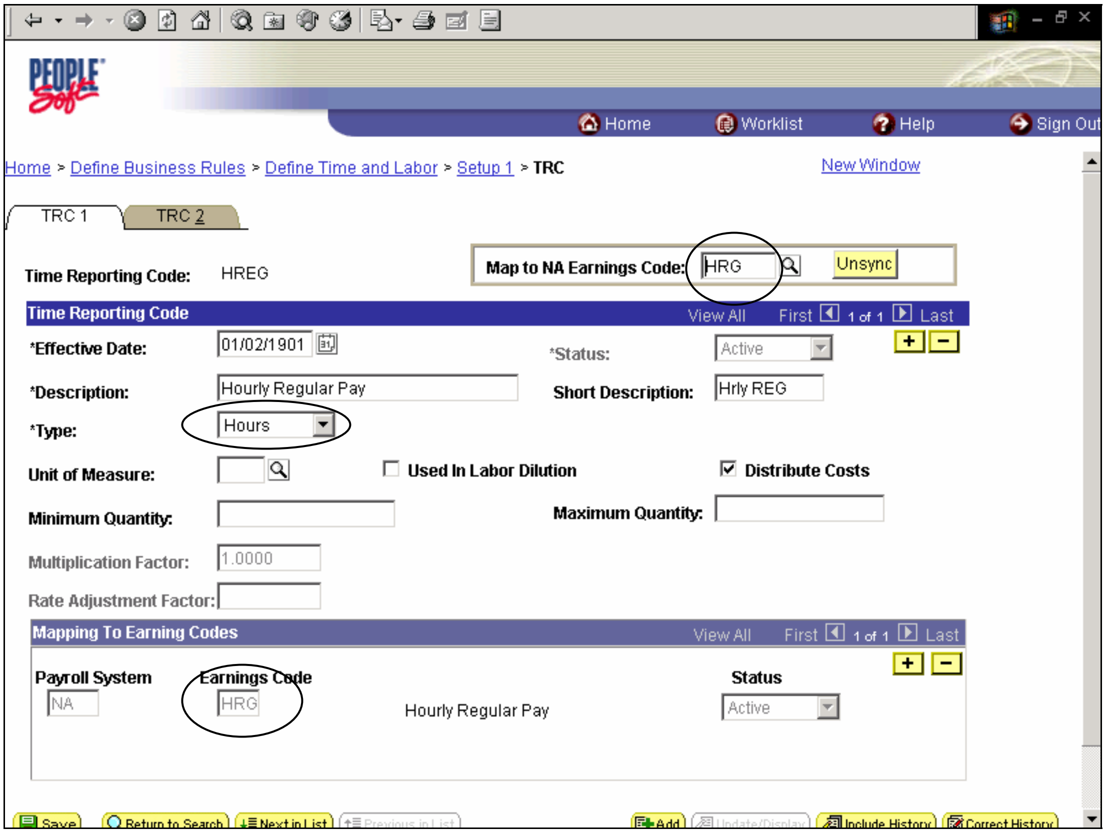
The second tab of the definition of the CTE Time Reporting Code - TRC2 is shown below. As it is defined, it adds to the Comp Time Balance.

CTE Definition - TRC2

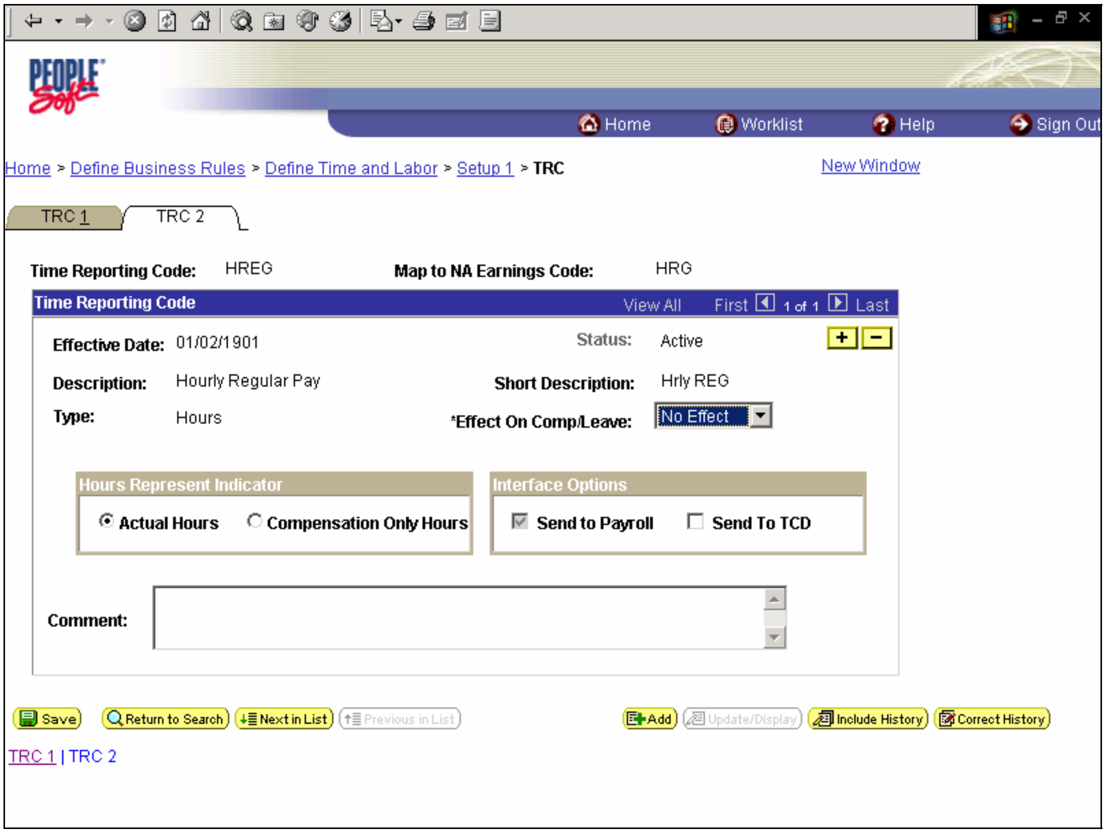


Therefore, by including this Time Reporting Code in this plan it will add hours to an employees balance when time is entered against this Time Reporting Code.

TRC Definition of Hourly (HREG)



HREG Definition – tab TRC2



Time Reporting Codes for Agency 805

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
ADJ	Earnings Adjustments	H	ADJ	NO	Y
ADLAD	Admin Lv Cool Off Adjustment	H		CERN	Y
ADLCO	Salary Admin Cool Off	H	ADL	CERN	Y
ADMLV	Salary Administrative Leave	H	ADM	NO	Y
ANNAD	Annual Leave Adjustment	H	ANA	NO	N
ANNLV	Annual Leave Salaried	H	ANL	LTKN	N
ANREC	Annual Leave Received	H	ANR	NO	N
BOARD	Board Members and Commissioner	H	BRD	NO	Y
BONE	Salary Regular Pay	H	SRG	NO	Y
CADJ	Comp Rate Adj (Mid Week)	H	CAJ	NO	Y
CAR	Vehicle Usage	A	CAR	NO	N
CAREE	Career Progression	A	CRP	NO	Y
CHARG	Charge Tips	A	CRT	NO	Y
COMM	Commissions	A	COM	NO	Y
CSI	Continuous Service Incentive	A	CSI	NO	Y
CTE	Comp Time Earned	H		CERN	Y
CTEAD	Comp Time Earn Adjustment	H		CERN	Y
CTEH	Comp Time - Time and a Half	H		CERN	Y
CTPO	Comp Time Payout	H	CTO	CTKN	Y
CTT	Comp-Time Taken	H	CTP	CTKN	Y
DALFY	Deceased Ann LV Follow Year	A	TVC	NO	N
DBD	Refund From Unpurchased Bonds	A	DBD	NO	Y
DBRFY	Deceased Bond Refund Follow Yr	A	TBD	NO	N
DCTFY	Deceased Comp Time Follow Yr	H	TCP	CTKN	N
DDCO	Dependent Care/other Cafe Plan	A	DCO	NO	N
DDCR	Dependant Day Care Adj	A	DDA	NO	N
DDPFY	Deceased Diff Pay Following Yr	A	TSH	NO	N
DHLFY	Deceased Holiday Pay Follow Yr	H	THL	CTKN	N
DISLV	Salary Regular Pay	H	SRG	NO	Y
DLGFY	Deceased Longevity Follow Yr	A	TLG	NO	N
DOTFY	Deceased O/T Follow Year	A	TOV	NO	N
DPINC	Data Processing Signing Incent	A	DPI	NO	Y
DRGFY	Deceased Reg Pay Following Yr	A	TEA	NO	N
DTHCP	Deceased Comp Time	H	DCP	CTKN	Y
DTHEA	Deceased Regular Pay	H	DEA	NO	Y
DTHHL	Deceased Holiday Pay	H	DHL	CTKN	Y
DTHLG	Deceased Longevity Payout	A	DLG	NO	Y
DTHOV	Deceased Overtime	H	DOV	NO	Y

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
DTHSH	Deceased Shift Differential	A	DSH	NO	Y
DTHVC	Deceased Annual Leave	H	DVC	NO	Y
EDUC	Educational Leave	H	LED	NO	Y
EEXPA	Employee Expense Allowance	A	EEA	NO	Y
ENFAD	Enforced Leave Adjustment	H		CERN	Y
ENFLV	Enforced Leave	H	ENF	CERN	N
EQUIT	Equity Based Pay Adjustment	A	EBP	NO	Y
EVA	EVE .12 HR (20.00 MO)	H	EVA	NO	Y
FEEWV	Fee Waiver Tickets Misc	A	FTM	NO	N
FLCT	FMLA Charged to Comp Time	H	FMC	CTKN	Y
FMAL	FMLA Charged to AL	H	FMA	NO	Y
FMDOC	FMLA Leave	H	FML	NO	N
FMHL	FMLA Charged Holiday Pay	H	FMH	CTKN	Y
FMSH	FMLA Charged Shared Leave	H	FMR	CTKN	Y
FMSL	FMLA Charged Sick Leave	H	FMS	NO	Y
FURLO	Furlough	H	FLW	NO	N
GIVAN	Annual Leave Given	H	ANG	LTKN	N
GIVSK	Sick Hours Given	H	SKG	LTKN	N
GRAT	Gratuity Pay	A	GRT	NO	Y
GTL	Group Term Life	A	GTL	NO	N
HECR	Higher Ed Cafe Refund	A	HCF	NO	N
HOLAD	Holiday Leave Adjustment	H		CERN	Y
HOLDY	Holiday - Salary	H	HOL	NO	Y
HOLPO	Holiday Payout	H	HPD	CTKN	Y
HOLT	Holiday - Salary	H	HOL	CTKN	Y
HOLWK	Holiday Worked	H		CERN	N
HOUS	Housing Allowance	A	HOU	NO	Y
HREG	Hourly Regular Pay	H	HRG	NO	Y
INDIN	Individual Incentive	A	IDC	NO	Y
JURY	Salary Regular Pay	H	SRG	NO	Y
LATXF	Lateral Transfer Adjustment	A	LAT	NO	Y
LONGO	Longevity Other-Dec, RIF, Ret	A	RLO	NO	Y
LONGV	Longevity	A	LON	NO	Y
LWOPE	Leave W/O Pay - Educational	H	DOC	NO	Y
LWOPP	Leave Without Pay - Suspended	H	DOC	NO	Y
LWOPS	Leave Without Pay - Scheduled	H	DOC	NO	Y
LWOPU	Leave Without Pay - Unschedule	H	DOC	NO	Y
LWPFW	Leave Without Pay W/C FMLA	H	DOC	NO	Y
LWPMI	Leave Without Pay - Military	H	DOC	NO	Y

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
MDA	MID .12 HR (20.00 MO)	H	MDA	NO	Y
MEDR	Medical Reimbursement	A	MED	NO	N
MILAD	Military Leave Adjustment	H		CERN	Y
MILLV	Military Leave Salary	H	MLS	CERN	Y
MISC	Miscellaneous (Contact OSF)	A	MIS	NO	N
MOVE	Moving Expenses	A	MOV	NO	N
MRKT	Market Adjustment Pay	A	MRK	NO	Y
NATL	Salary Regular Pay	H	SRG	NO	Y
NONDP	Non-DP Incentive	A	SIC	NO	Y
ORGAD	Organizational Leave Adjustmen	H		CERN	Y
ORGD	Salary Regular Pay	H	SRG	NO	Y
ORGLV	Organizational Leave Salary	H	OLS	CERN	Y
OTHPD	Other Paid Leave	H	OTH	NO	Y
OTPAY	Overtime @ 1.5x	H	OVT	NO	Y
OTSTR	Overtime @ 1.0x (Straight)	H	OTS	NO	Y
PERF	Perform Award NonDiscretionary	A	PRF	NO	Y
PERFD	Perform Award Discretionary	A	PRD	NO	Y
PROBA	Probationary Per Complete	A	PRB	NO	Y
RADJ	Retro Pay Adjustment	A	RAJ	NO	Y
RETPY	Retirement Pay	A	RTP	NO	Y
SCKTK	Sick Leave Salaried	H	SKL	LTKN	N
SEVRN	Severance Pay	A	SEV	NO	Y
SHA	SHIFT .12 HR (20.00 MO)	H	SHA	NO	Y
SHLAD	Shared Leave Adjustment	H		CERN	Y
SHLGV	Shared Leave Given Back	H		CTKN	Y
SHLNA	Shared Leave Non-Term Adjust	H		CERN	Y
SHLNT	Shared Leave Non-Terminal	H		CERN	Y
SHLTA	Shared Leave - Term ILL Adjust	H		CERN	Y
SHLTR	Shared Leave - Terminally Ill	H		CERN	Y
SHLVT	Shared Leave Taken	H	LVS	CTKN	Y
SHP	SHIFT 2.00 HR (350.00 MO)	H	SHP	NO	Y
SHREC	Shared Leave Rec	H		CERN	N
SICAD	Sick Hours Adjustment	H	SCA	NO	N
SICRC	Sick Leave Received	H	SKR	NO	N
SLVER	OK Health Program - Silver	A	SLV	NO	Y
STINS	State Insurance Cafe Refund	A	SCF	NO	N
STUFD	Student Fund	A	STF	NO	N
SUSPD	Suspended With Pay	H	SUS	NO	Y
TERM	Annual Leave Payout	H	ALP	NO	Y

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
TIPAD	Tip Adjustments to Minimum	A	TAD	NO	Y
TIPCA	Cash Tips	A	CAT	NO	Y
TIPCR	Tip Credit	A	TRC	NO	N
UNTIN	Unit Incentive	A	GRI	NO	Y
VIS	Visual Care Reimbursement	A	VIS	NO	N
VOLFF	Salary Regular Pay	H	SRG	NO	Y
WCANN	Workers Comp - Annual Leave	H	WCA	NO	Y
WCCMP	Workers Comp - Comp Time	H	WCC	NO	Y
WCSCK	Workers Comp - Sick Leave	H	WCS	NO	Y
WCSH	Sick Leave Hourly	H		NO	Y
WCSHR	Workers Comp - Shared Leave	H	WCH	CTKN	Y
WCSS	Sick Leave Salaried	H	SKL	NO	N
WCWOP	Worker's Comp - Without Pay	H	WCO	NO	N

Defining Workgroups

In PeopleSoft Time and Labor, employees that share similar characteristics can be grouped together in Workgroups. For the State of Oklahoma it was determined to group full-time, salaried employees from the same agency into their own workgroup. If an agency has hourly/temporary employees they have also been grouped together in their own Workgroup.

The naming convention for Workgroups is an eight character value as follows:

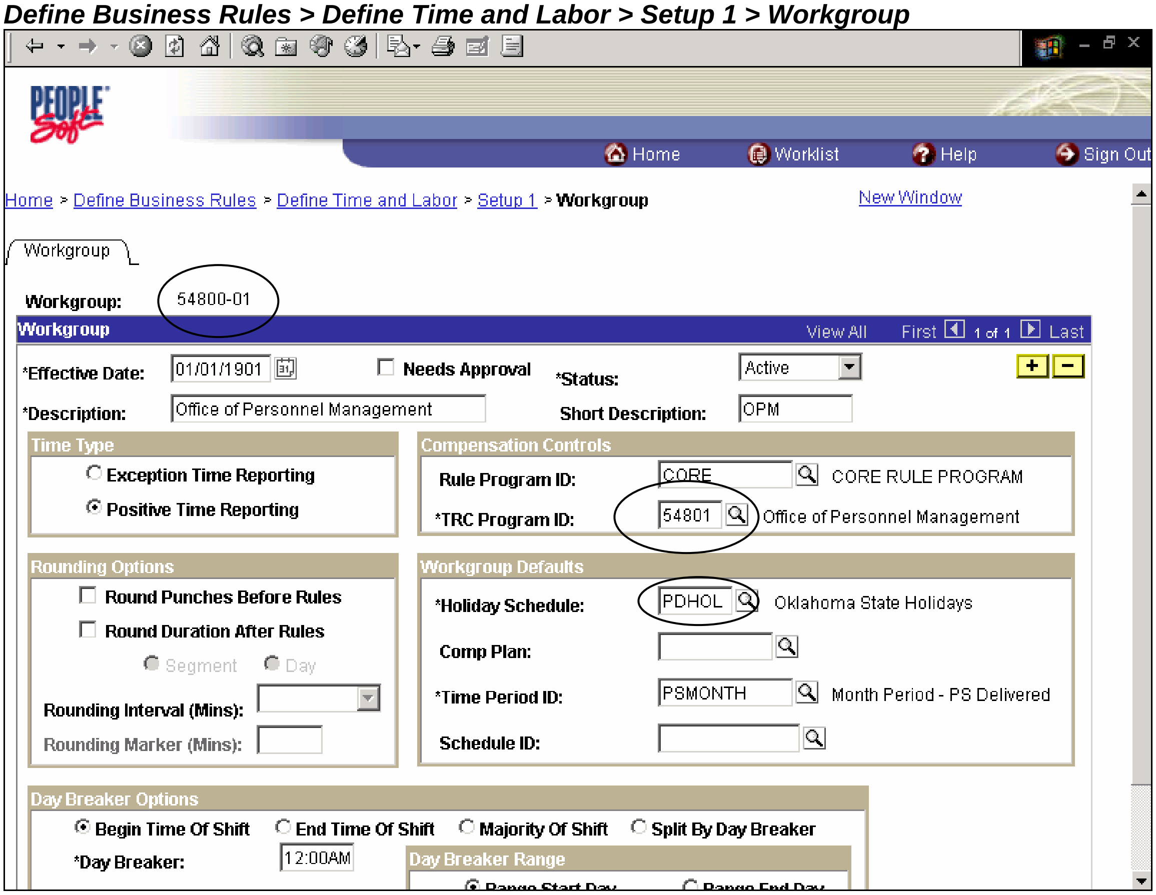
- The first three characters are the agency number.
- The next three characters are "00-"
- The last two characters are either "01" for full-time salaried employees, or "02" for part-time/temporary employees.

Therefore, Rehabilitation Services will have two Workgroups:

- 80500-01 for their Full-time Salaried Employees and
- 80500-02 for their part-time/temporary employees.

Let's take a look at how a Workgroup is defined and see how it relates to the State of Oklahoma.

Define Business Rules > Define Time and Labor > Setup 1 > Workgroup



At the top there is the usual Effective Date, Active and Description fields. There is also a check mark for "Needs Approval". It has been determined that all time entered into Time and Labor will have already gone through an approval process. Therefore, this feature will not be used and no Workgroups should have this checkbox selected.

Time Type – All Workgroups will have the Time Type designated as Positive Time Reporting.

Compensation Controls – One rule has been established regarding Compensatory Time being calculated at time and a half. The Rule Program ID field will have a value of CORE for each Salary related Workgroup. Each Workgroup will have a TRC Program associated with it (see previous section on TRC Program) and should be entered in the TRC Program ID field.

Workgroup Defaults – The Holiday Schedule is maintained in Payroll, but Time and Labor will use it. A Holiday Schedule of ***PDHOL*** has been established for Workgroups that include full-time salaried employees. A Holiday Schedule of ***NONE*** has been established for Workgroups with part-time, temporary
employees. The Time Period ID is not necessary because schedules are not being used at this point and we have Positive Time Reporters.

For the sections shown in this screen print, Rounding Options and Day Break Options are not relevant to the State of Oklahoma. These are for Punch-Time Reporters and the State of Oklahoma does not use Punch-Time Reporting.

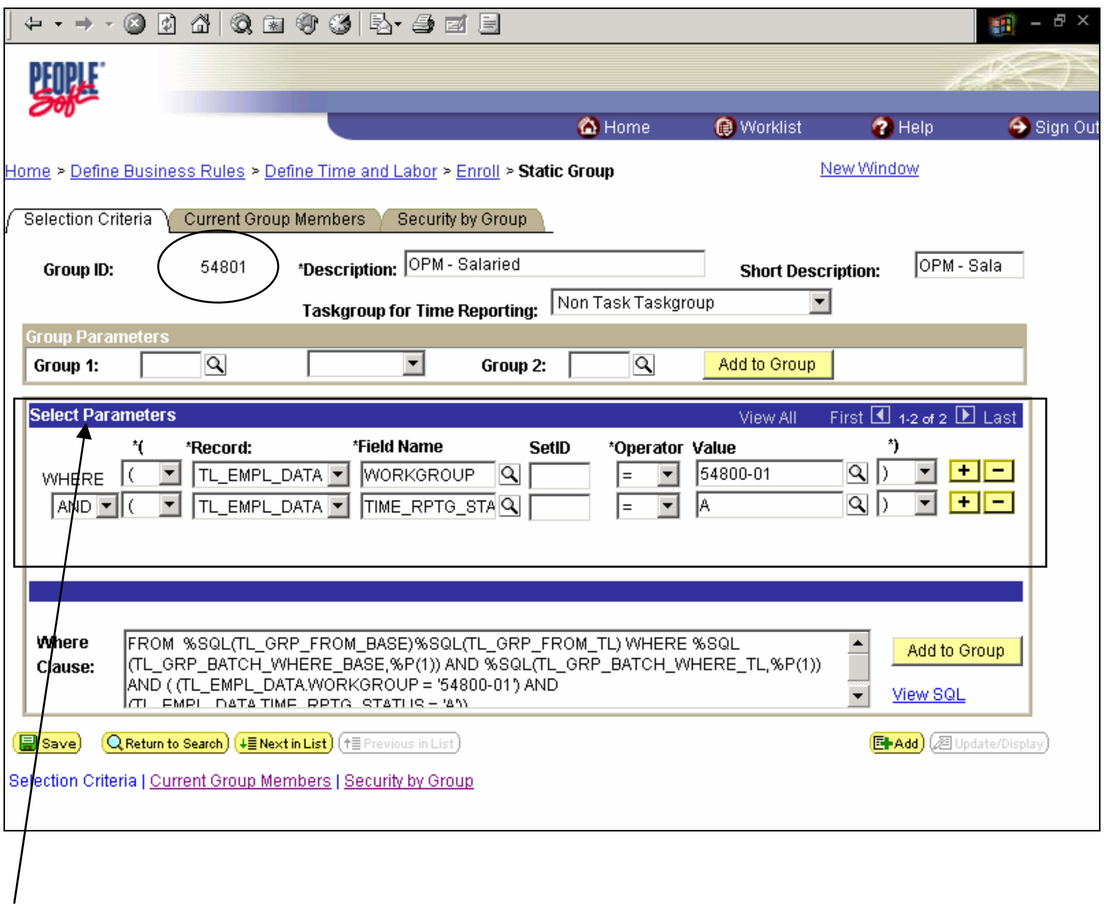
Defining Static Groups

PeopleSoft Time & Labor allows you to set up groups of employees to be used in a variety of on-line and batch functions which are called Static Groups. This is different from Workgroups.

Static Groups are used predominately for batch processing of time and to determine which employees can be viewed when entering time. For example, the Time Administrator for OPM will not be able to enter time for employees of Rehab Services. We will see this in the section regarding processing time.

All the Static Groups for the State of Oklahoma have been established prior to an agency moving into a production environment. You will only have to maintain it as employees come and go from your agency.

In the screen print below, you can see how a Static Group for OPM was established.



In common terms, what the Select Parameters section is saying is: "look at the record TL_EMPL_DATA (***which is where the Time Reporter Page Data is stored***) and the field within that record called WORKGROUP. If the WORKGROUP value in the employee's time reporter page is 54800-01, then add that employee to this Static Group". The second line says to only include the Time Reporters that are

Active in this Static Group. So – these two lines are saying if the time reporter has a workgroup = 54800-01 and the status is Active, add that time reporter to the Static Group.

If the time reporter is not a member of a static group, ***you cannot see the employee*** in the drop down list to enter time into weekly elapsed time for that employee.

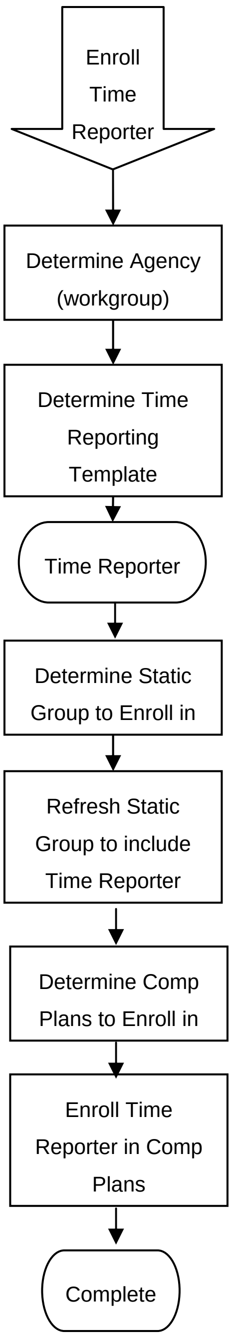
ENROLLING TIME REPORTER

BUSINESS PROCESS FLOW

Define Business Rules > Define Time & Labor > Enroll > Create Time Reporter Data

Define Business Rules > Define Time & Labor > Enroll > Comp Plan Enrollment

Define Business Rules > Define Time & Labor > Enroll > Static Group



An employee must be hired in HRMS before they can be enrolled in Time & Labor. The Enrollment process may be done through a link in HR or directly in Time & Labor.

All Time Reporters are Elapsed Time Reporters.

All Time Reporters will use the Time Reporting Template called REGULAR.

All Time Reporters will have a default Time Period of PSMONTH or BIWEEKLY

No Time Reporters will track tasks. Therefore, all Time Reporters will use the delivered Taskgroup of PSNONTASK.

Employee may be enrolled in multiple Comp Plans.

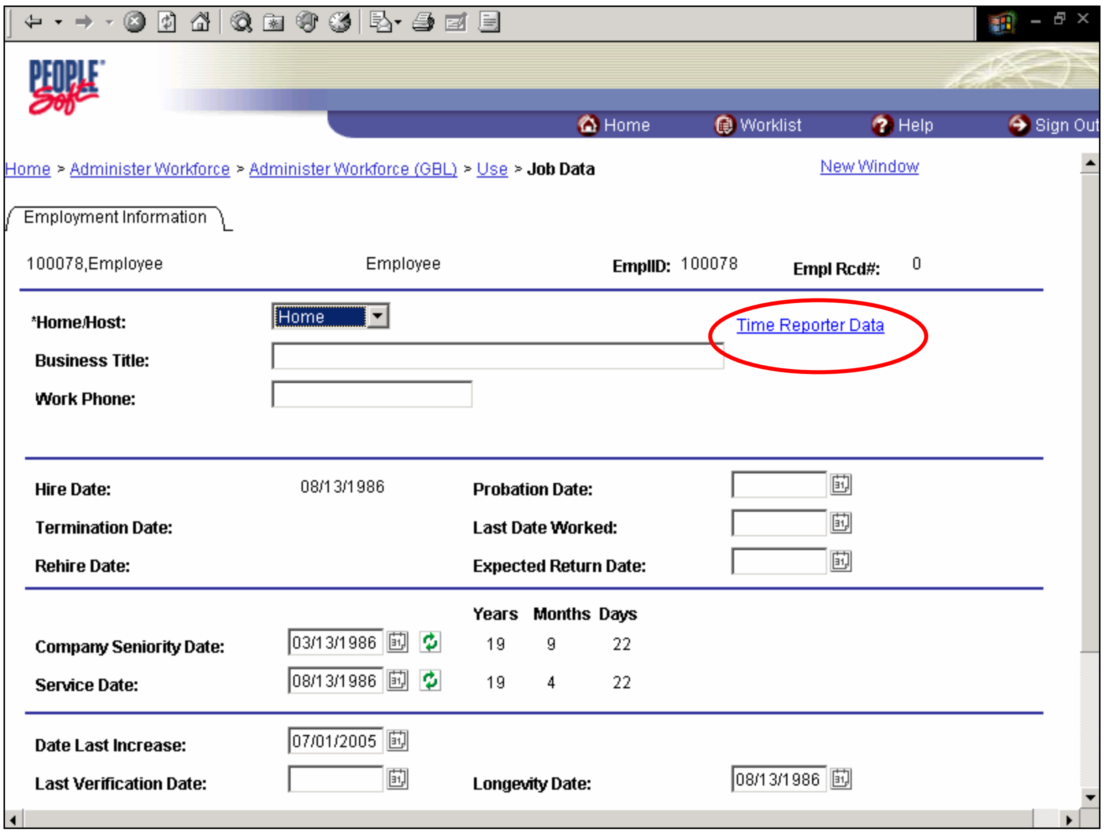
New employee gets enrolled in a Static Group when group is refreshed.

DEFINING TIME REPORTER DATA

Enrolling an employee in Time and Labor can be done through the Employment Information page in the Job Data component. Use this approach if you want to enroll them while hiring them or if they are changing other job data that will change their Time & Labor enrollment information. For example, if they change agencies they will be changing Workgroups.

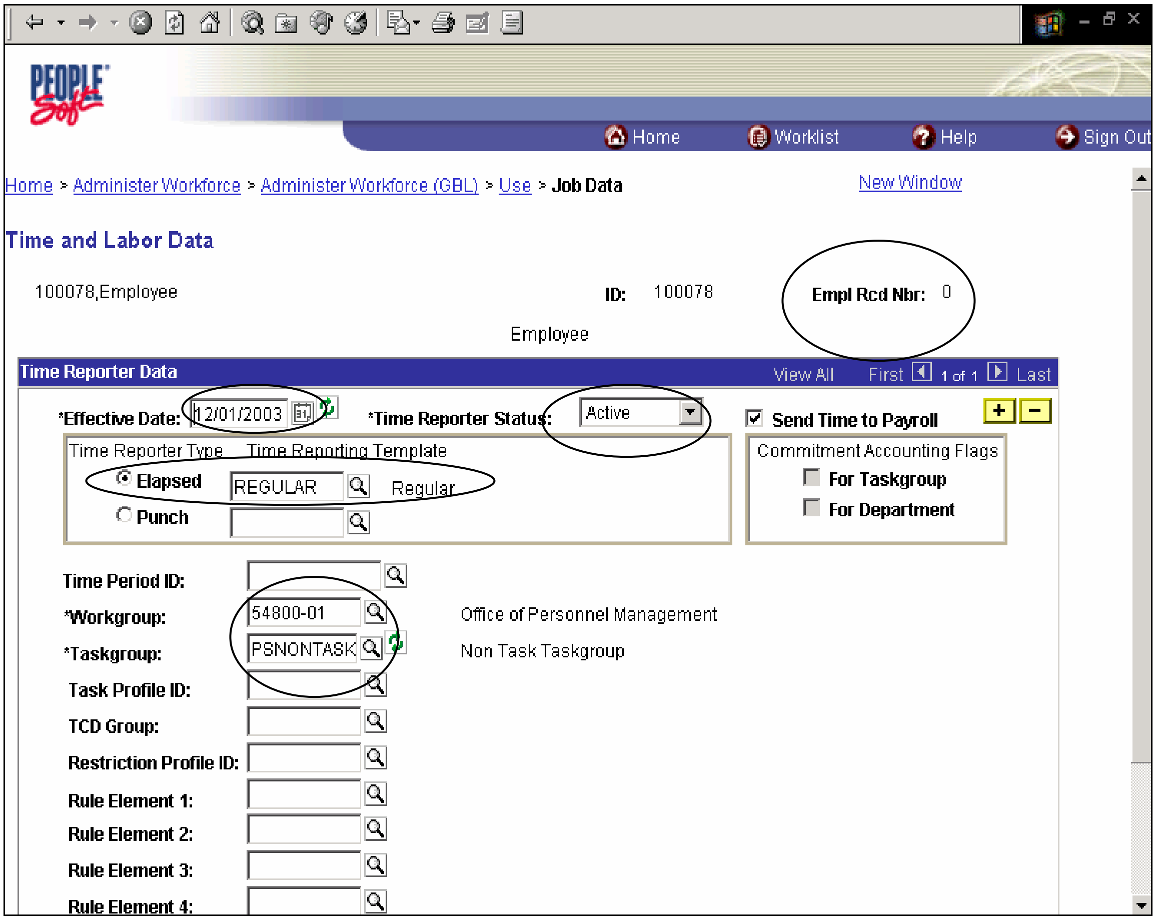
The State of Oklahoma has determined that this page will be maintained by HR.

Administer Workforce > Administer Workforce (GBL) > Use > Job Data > Employment Data Link >



Click on the blue hyperlink ***Time Reporter Data*** to access the page.

Use this page if you want to enroll an employee in Time & Labor at HIRE time, REHIRE time or moving an employee from one agency to another or one workgroup to another.



Populate the relevant fields in the following manner:

Payable Time Start Date – leave blank

Effective Date – ***WATCH THIS DATE***. On a new HIRE or REHIRE, this date must match the HIRE date or the REHIRE date. On other changes, it should be the date that the change becomes effective. It is the date you want to start entering time for.

Time Reporter Status – Active

Send Time to Payroll – Checked – updated by the system when you get out of the record.
Time Reporter Type – ***Elapsed***
Time Reporting Template – ***REGULAR***
Workgroup – Agency Number + 00 + -01 for Salary or -02 for Hourly. Example: 54800-01

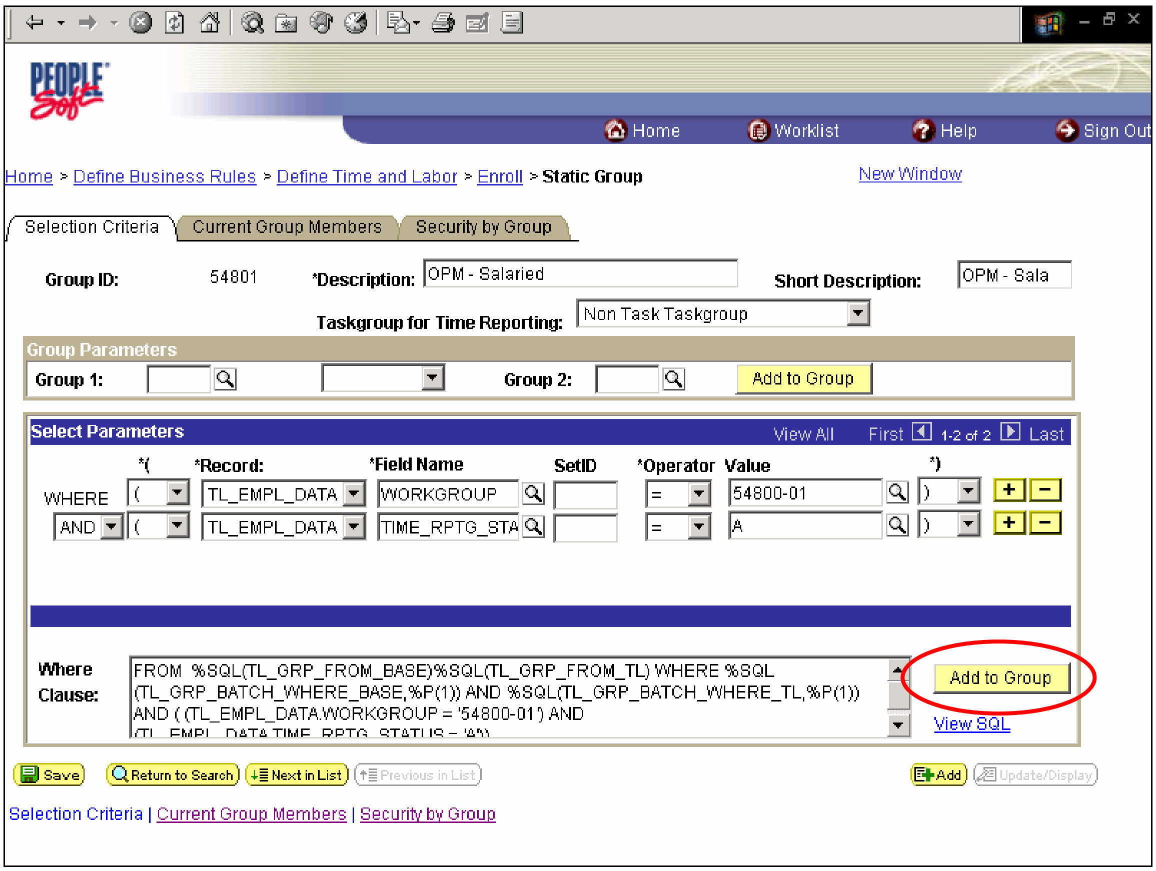
Taskgroup – ***PSNONTASK***
Time Zone – ***CST***

Click **OK** at the bottom of the screen.

UPDATING THE STATIC GROUP

Updating the Static Group is the last step in this business process. This will add or remove Time Reporters from the group as necessary. Static Groups will already be established. Just navigate to the correct Static Group and click the bottom ‘Add to Group’ button.

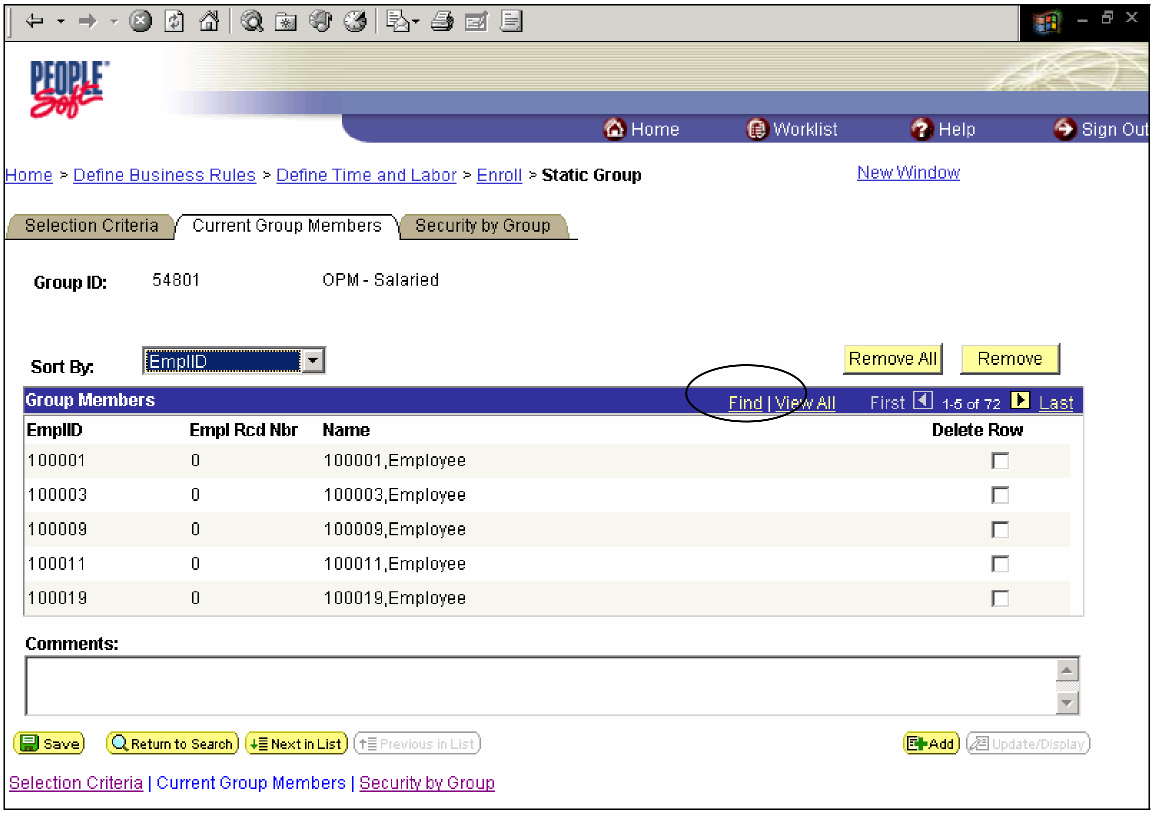
Define Business Rules > Define Time and Labor > Enroll > Static Group > Selection Criteria



A message box will appear indicating how many people were added to the group. To see the members of this group, click on the second tab – Current Group Members.

Always click on ***SAVE*** – after adding the employees to the static group.

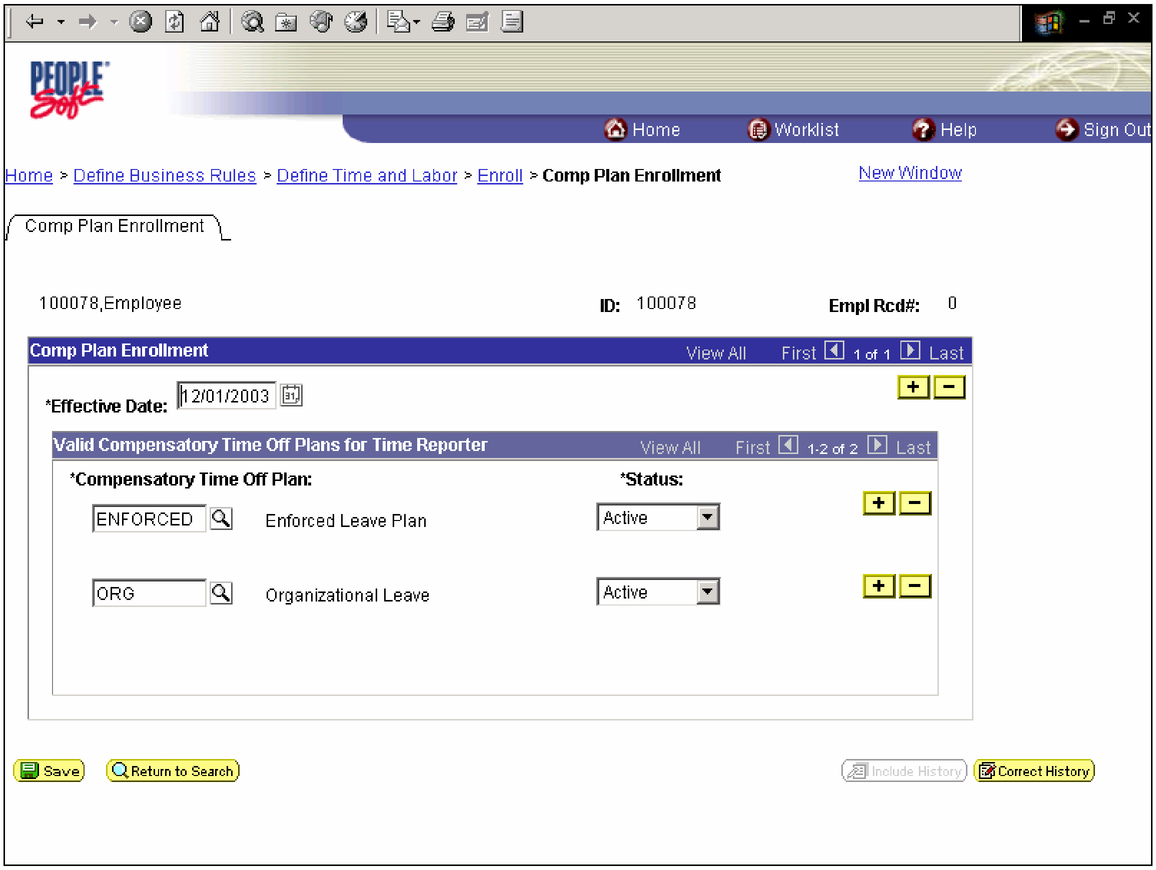
CURRENT GROUP MEMBERS



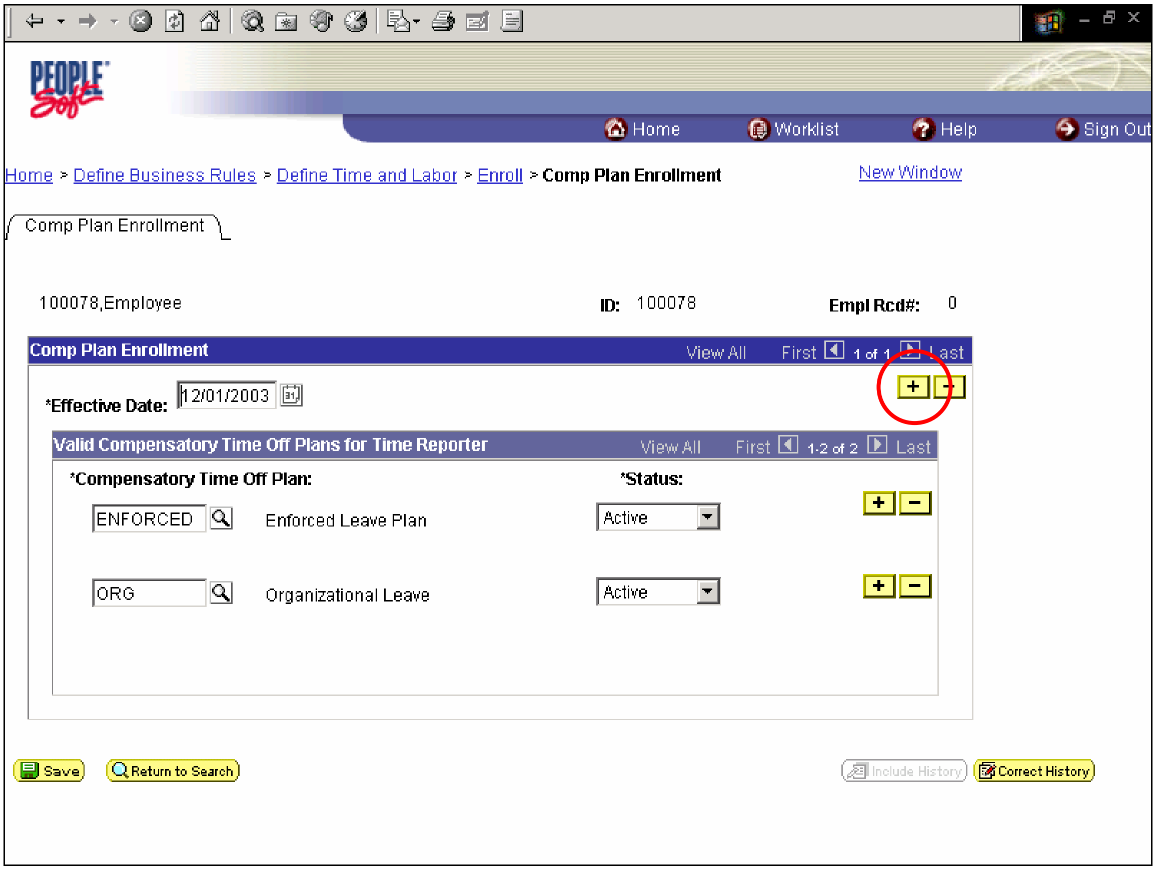
Use ***FIND*** to search for the new employees added to the group.

ENROLL TIME REPORTER IN COMPENSATORY TIME PLAN

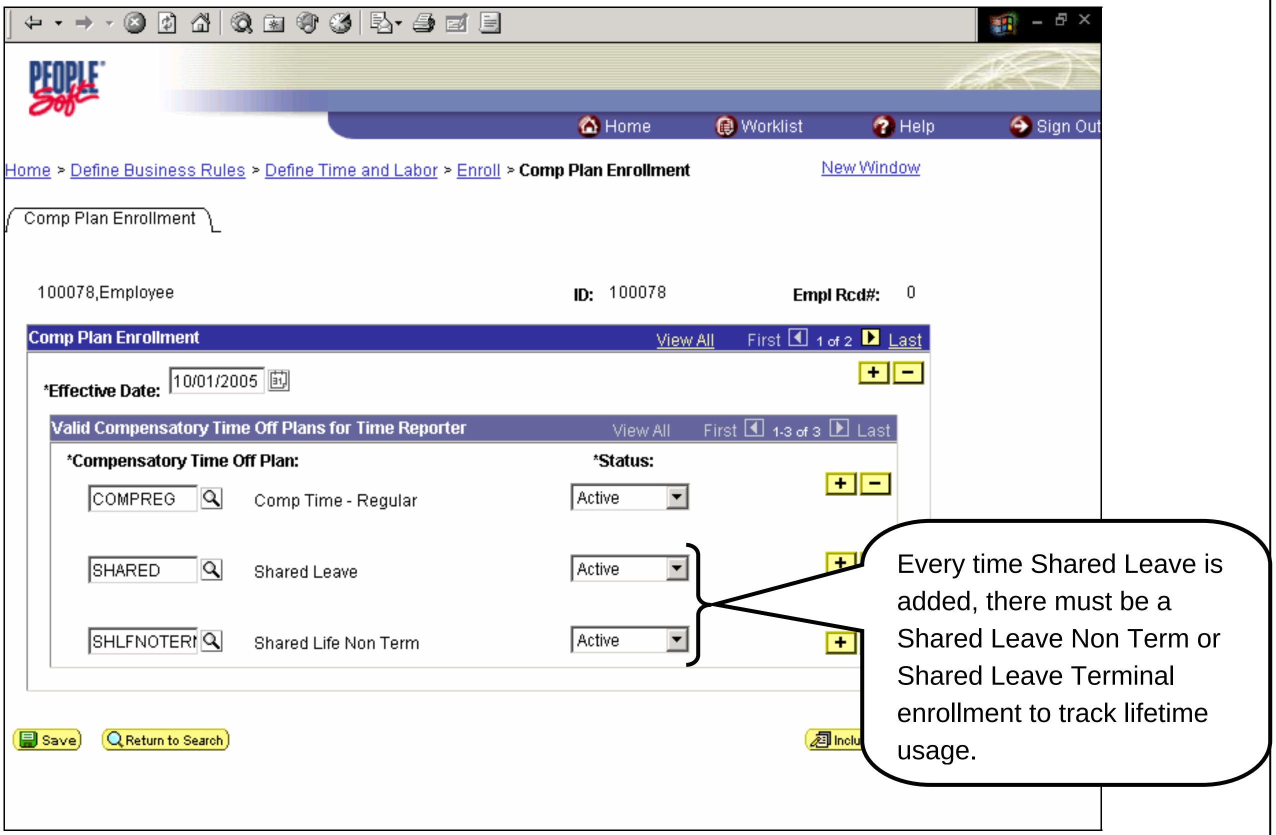
The next step is to enroll the Time Reporter in the Compensatory Time Plans they are eligible for. During the conversion process, employees were enrolled in plans if they currently had a balance in any of the plans. For example, 100078,Employee was enrolled in two different plans.



If you wanted to enroll 100078,Employee in additional plans, you would retrieve his enrollment record as in the previous screen then click the icon on the Effective Date level. This will provide a new field for entering a Compensatory Time Plan. The other plans are not brought forward and displayed here but the employee is still enrolled in them.



Enter the 3 new Compensatory Time Plans in the fields provided and click Save.

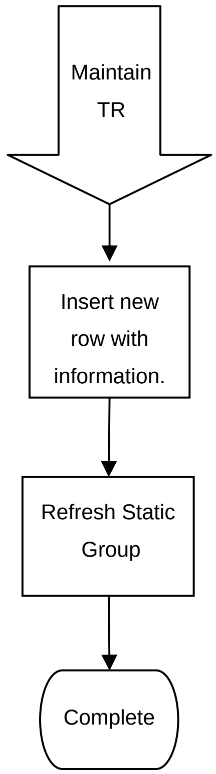


Always ***SAVE*** before you leave the page.

MAINTAIN TIME REPORTER DATA

BUSINESS PROCESS

Define Business Rules > Define Time & Labor > Enroll > Maintain Time Reporter Data



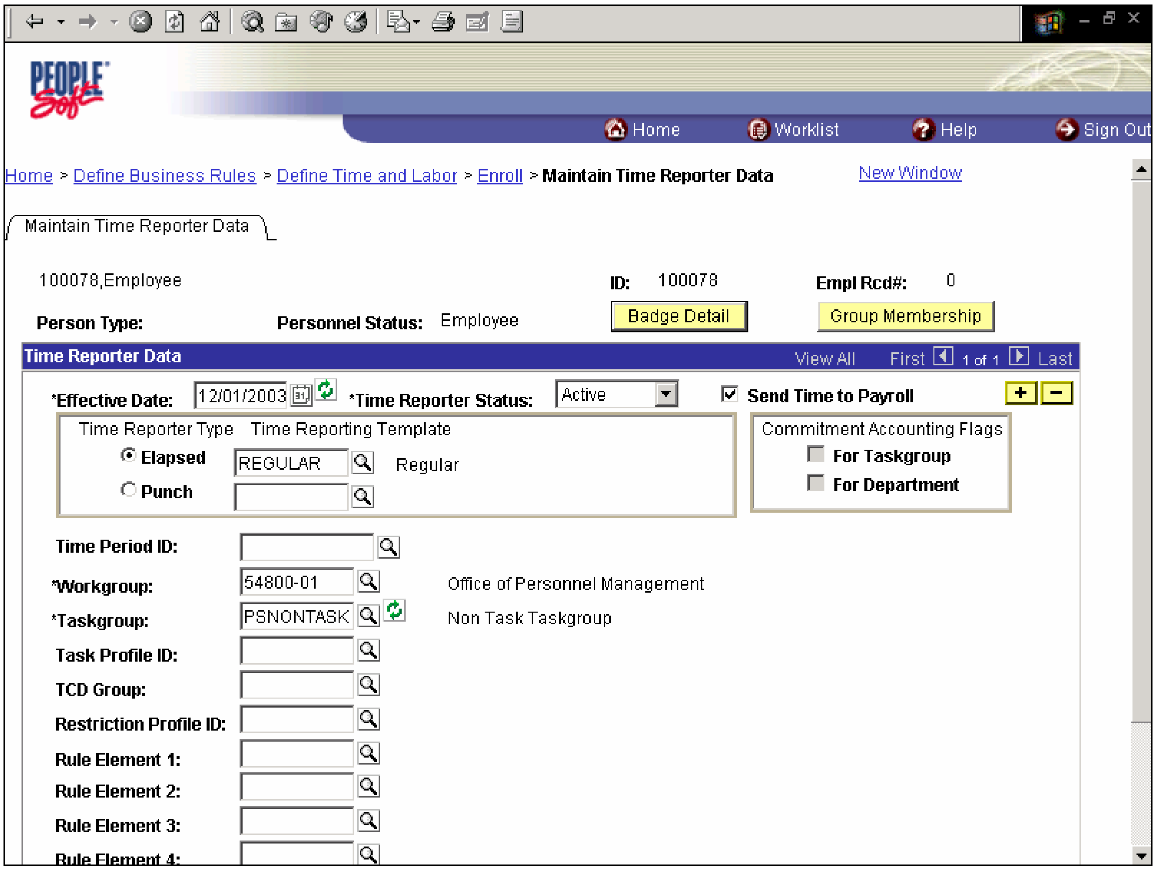
Maintain Time Reporter can be used anytime the Time Reporter Page needs to be updated.

Most all changes to the page requires that a new row be inserted before the data can be entered.
Most of the time, this will only be a workgroup change.

Enroll the Time Reporter in the Static Group that the Time Reporter now belongs to.

MAINTAIN TIME REPORTER DATA PAGE

Notice that the Maintain Time Reporter Data page looks exactly like the Create Time Reporter page.



Make changes as necessary. Insert a new effective dated row when you have to make changes.
For example, if a person switches Workgroups, insert a new row with the date it becomes effective and enter the other appropriate values.

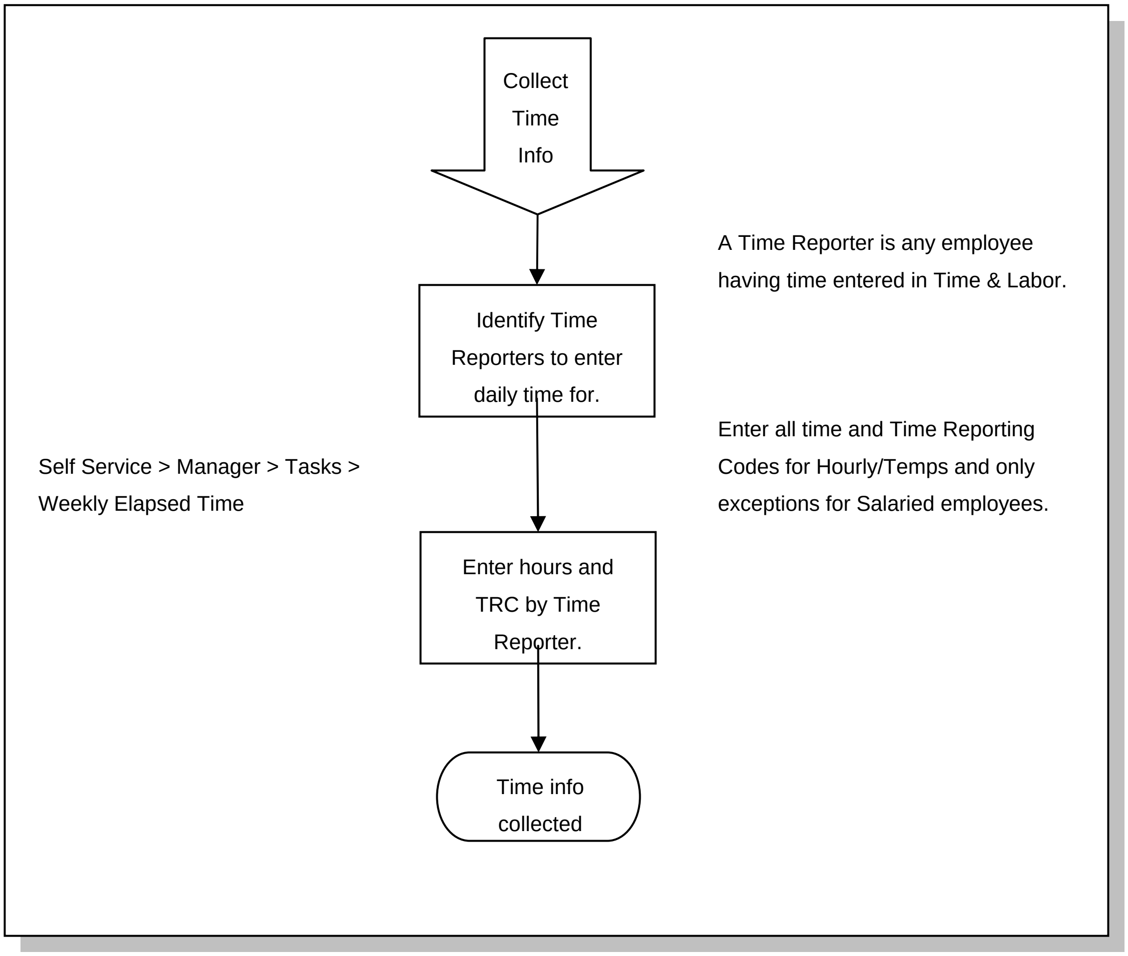
Always ***SAVE*** before you leave the page.

NOTE: The HIRE and Adding A Concurrent Job selections will automatically insert this page for you.
Any other type of action requires you to manually insert a row to make your changes.

NOTE: Remember to update the Static Groups if someone switches Workgroups or Agencies.

ENTERING TIME

BUSINESS PROCESS FLOW



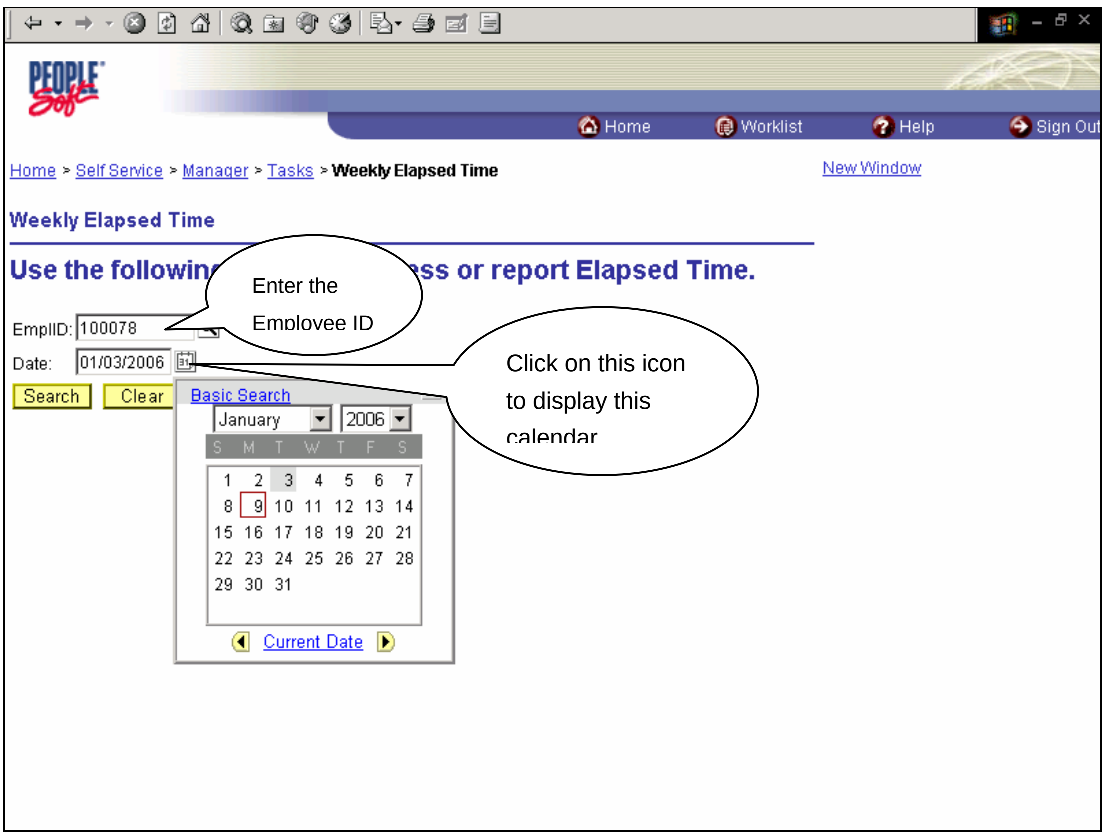
All time that is entered or loaded at the State of Oklahoma will be entered through the ***Weekly Elapsed Time Page.***

WEEKLY ELAPSED TIME

Self Service > Manager > Tasks > Weekly Elapsed Time

To enter time for an employee, navigate to the Weekly Elapsed Time page. At the Search Dialog Box, enter the Employee ID and Date. You can click on the magnifying glass next to the Emplid field to search by name. You can also click on the calendar icon to display the calendar and select a date from there.

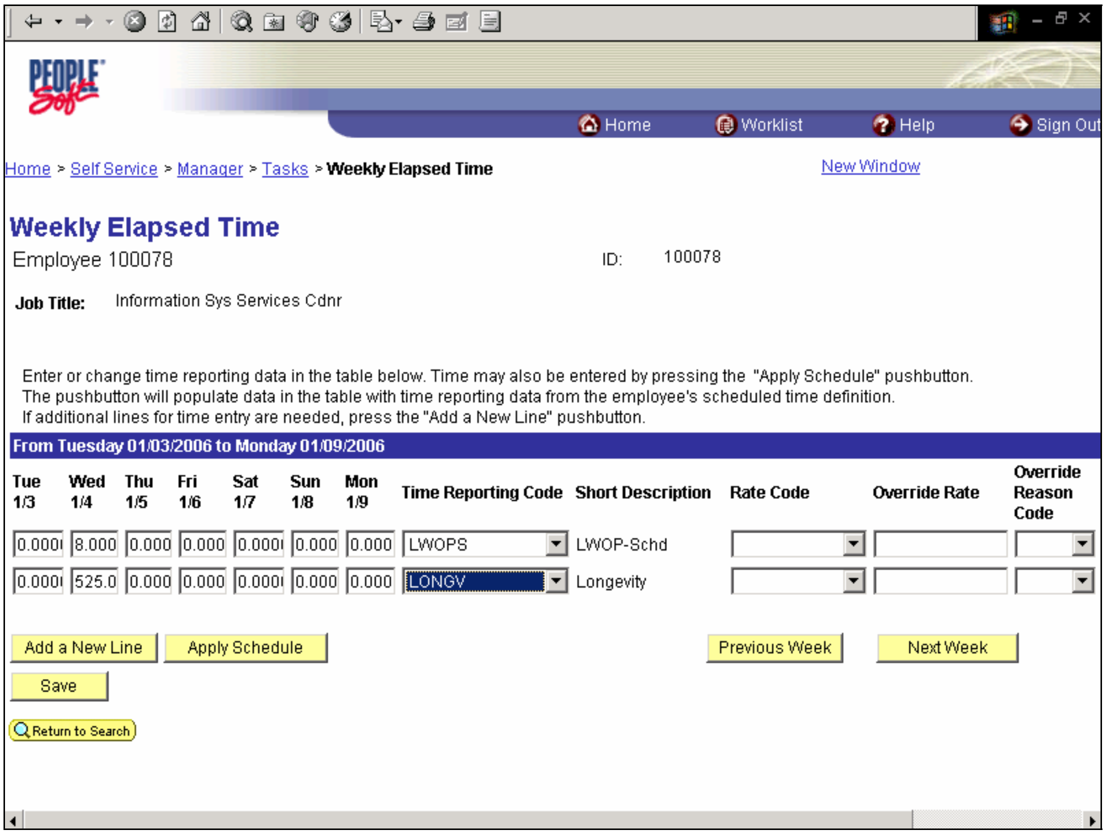
NOTE: The date entered in the date field will be the first day displayed on the Weekly Elapsed Time page. For example, 1/03/06 is a Tuesday. Therefore, the days displayed on the Weekly Elapsed Time page will start with Tuesday and end with Monday. If 1/01/06 were entered, then the days would display Sunday thru Saturday.



For this example, our employee is a full time, salaried employee, so we will only enter their exceptions for this pay period. We will enter 8 hours of Leave without Pay, Scheduled (TRC=LWOPS) on January 4 and $525.00 of Longevity also on the 4th and 8 hours of Comp Time Earned (TRC=CTE) on January 5th.

WEEKLY ELAPSED TIME PAGE

Enter 8 hours Leave without Pay,Scheduled (LWOPS) on January 4th

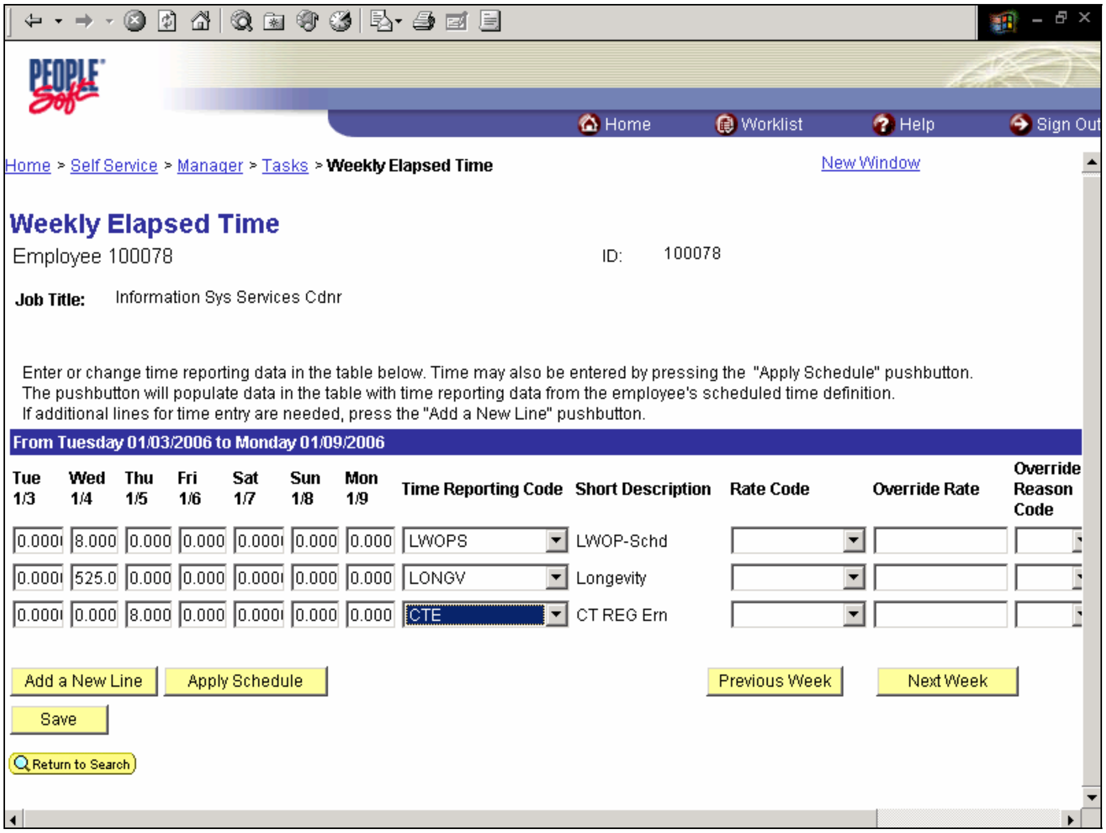


Add another new line

Enter Longevity for $525.00 also on January 4th

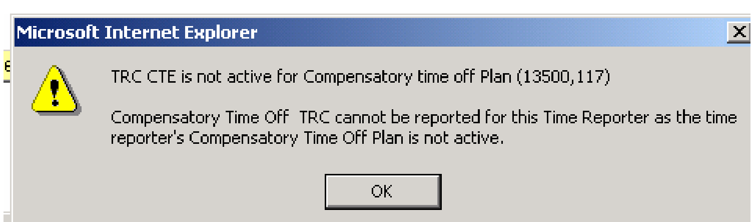
Add another new line.

Key in the Comp Time Earned of 8 hours on January 5th.



Click on ***SAVE.***

When I clicked on SAVE, I got this message



It tells me that I haven't setup the Comp Time Plan for my employee and I cannot save the time I entered for TRC ***CTE***.

I have two choices: I can delete the CTE time and forget it or I can go back and enroll my employee in the Comp Time Plan. I have to delete the CTE row to save my other two rows.

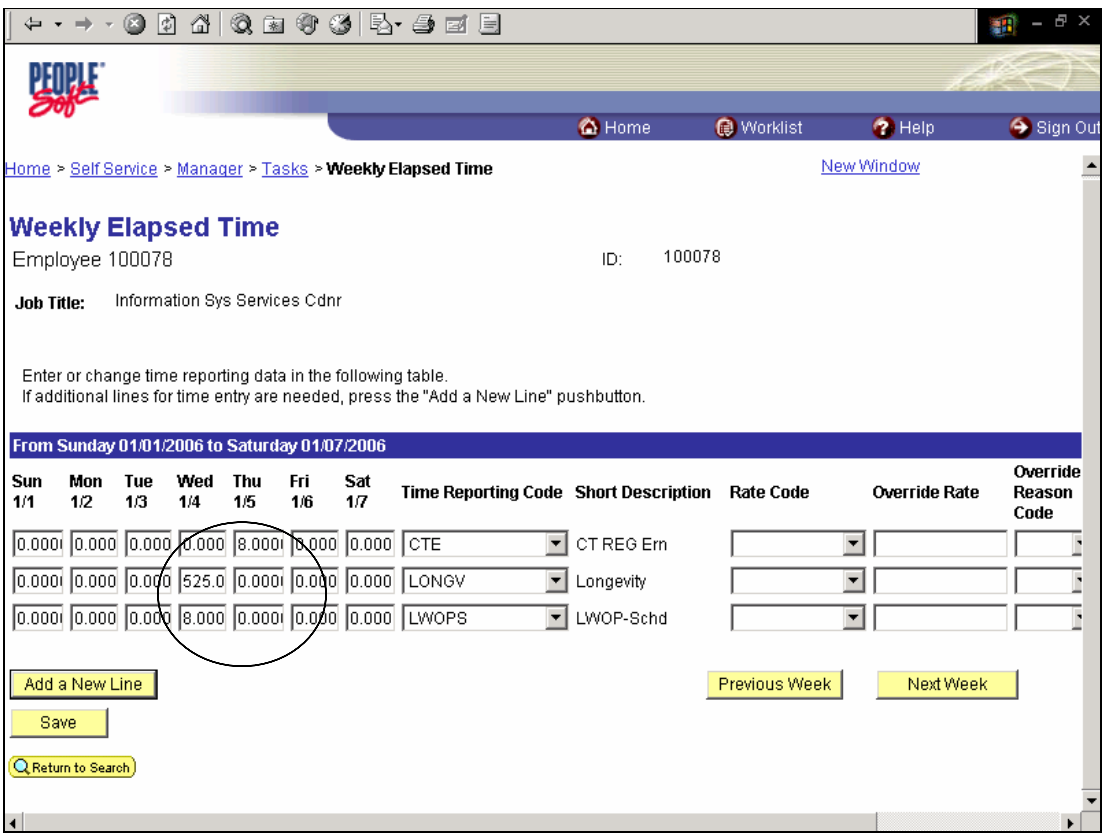
To enroll the employee in the comp time plan, go to

Define Business Rules > Define Time and Labor > Enroll > Comp Plan Enrollment
Select the plan and save.

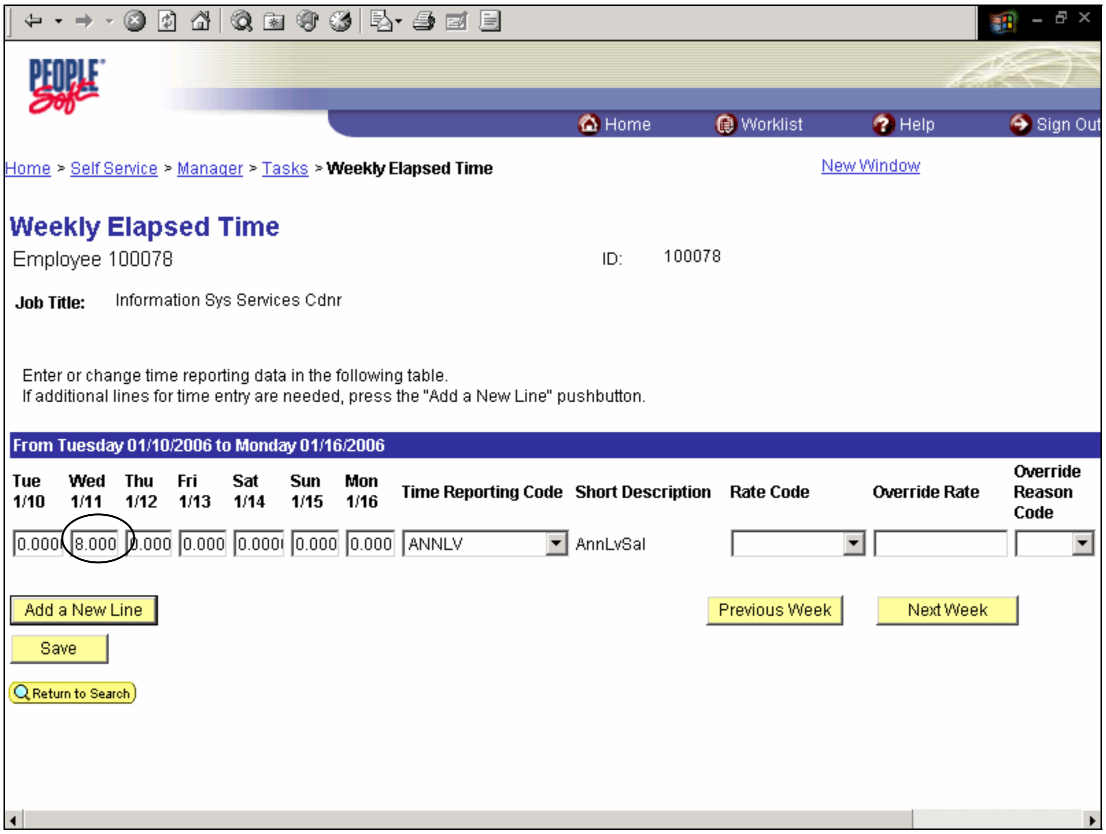
Go back to Weekly Elapsed Time and add the additional row for CTE.
Self Service > Manager > Tasks > Weekly Elapsed Time

You must SAVE on this page before you go to another week. The system will let you change pages without the data being saved.

After you save, the page looks like this one. It sorts the rows based on Time Reporting Code values.



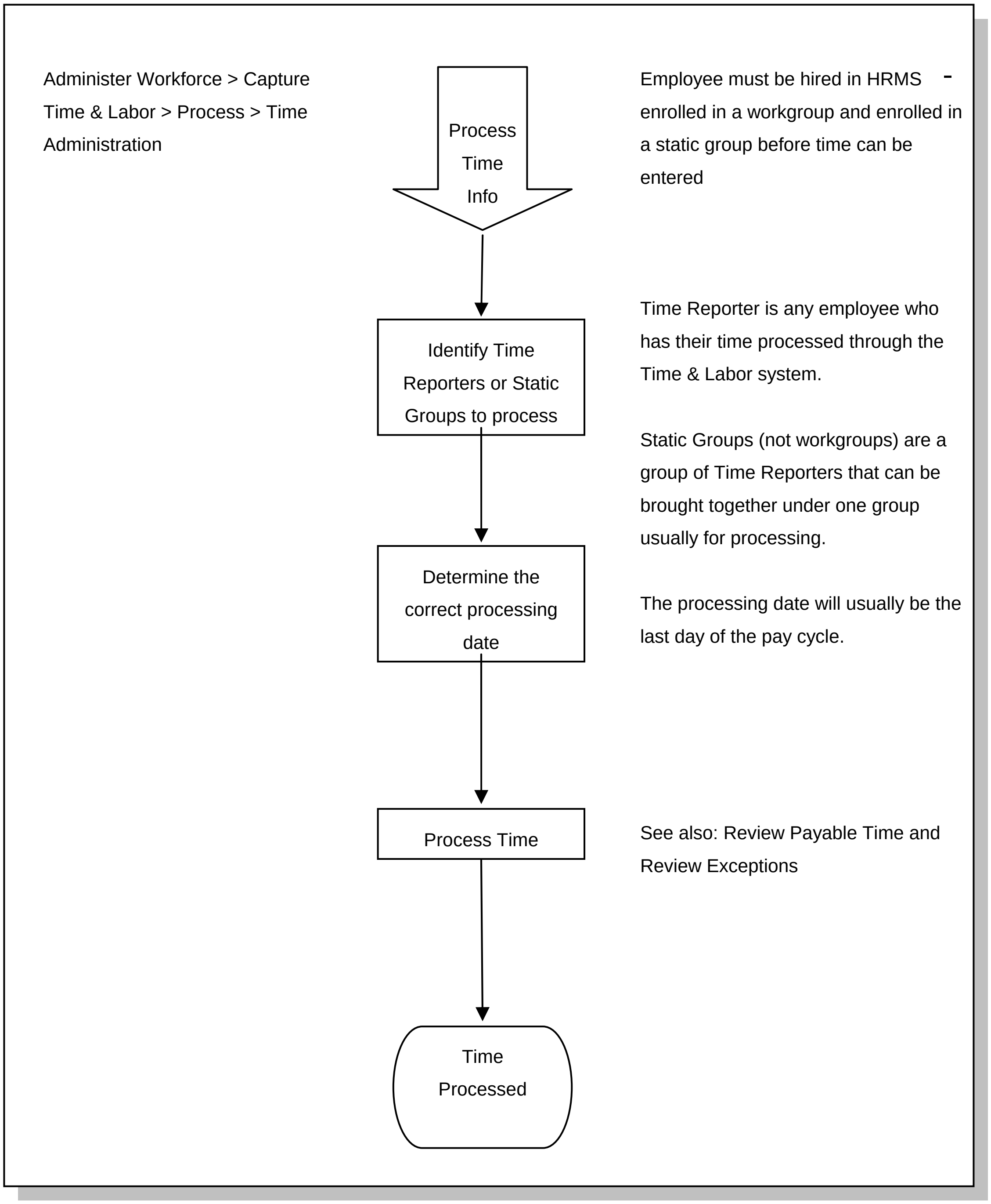
Click on the Next Week icon and enter 8 hours of Annual Leave on January 11th and SAVE the Record.



In production, you will continue this process, entering time for all employees in your Workgroup. You will want to enter time on a daily or weekly basis. You can change data as needed because nothing really happens until you perform the next step – Running Time Administration. You can even change data after that.

Processing Time

Business Process Flow



RUNNING TIME ADMINISTRATION (TIME ADMIN)

Now that time has been entered, it needs to be processed. This is done by running a batch job called Time Administration. Let's take a look at the page and see how it works.

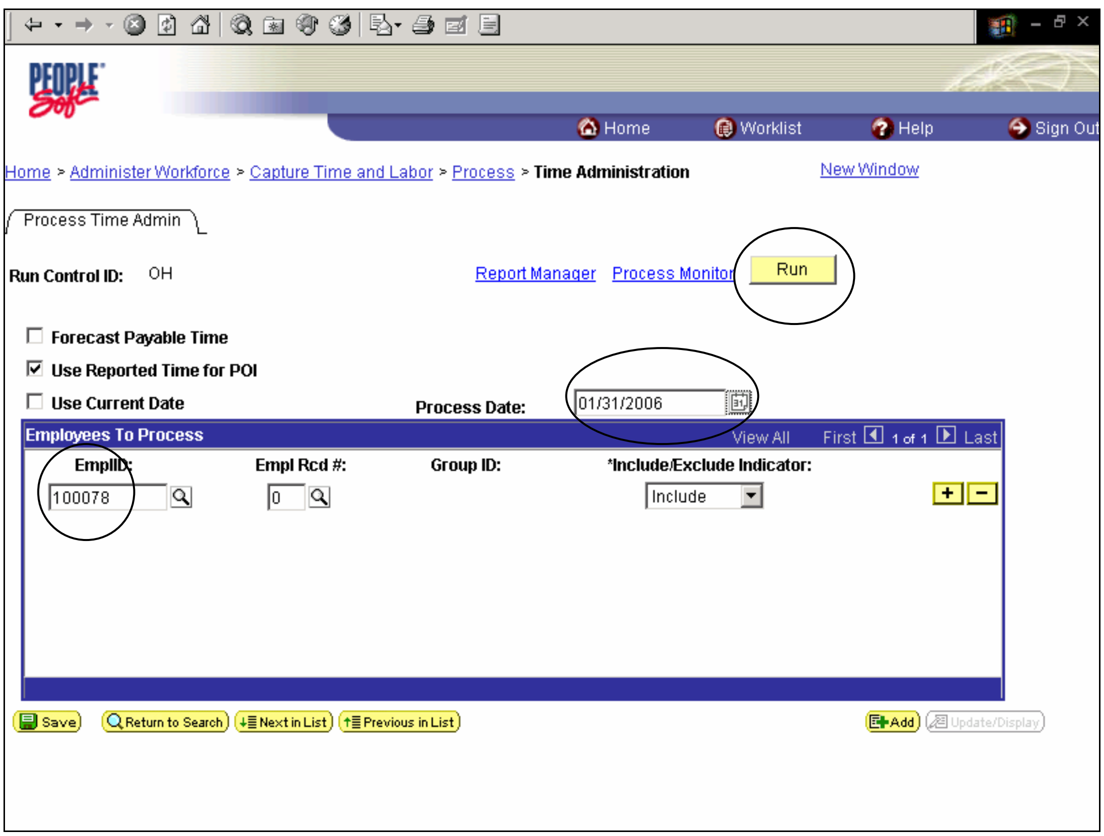
When using this page, leave the checkboxes as is. The Process Date and the Employee(s) or Group(s) to process are the important fields.

Notice the + and − buttons. These work the same way as all other pages in PeopleSoft. This allows you to enter one or more employees and/or groups. If you enter a value in the EmplID field then tab out, the Group ID field disappears. Likewise, if you enter a value in the Group ID field and tab out, the EmplID field disappears.

The Process Date will process all time up to and including that date. You will generally want this to be the last day of your pay period.

After completing the run control fields, click the Run button. It is not necessary to save this page since clicking the Run button also does a Save.

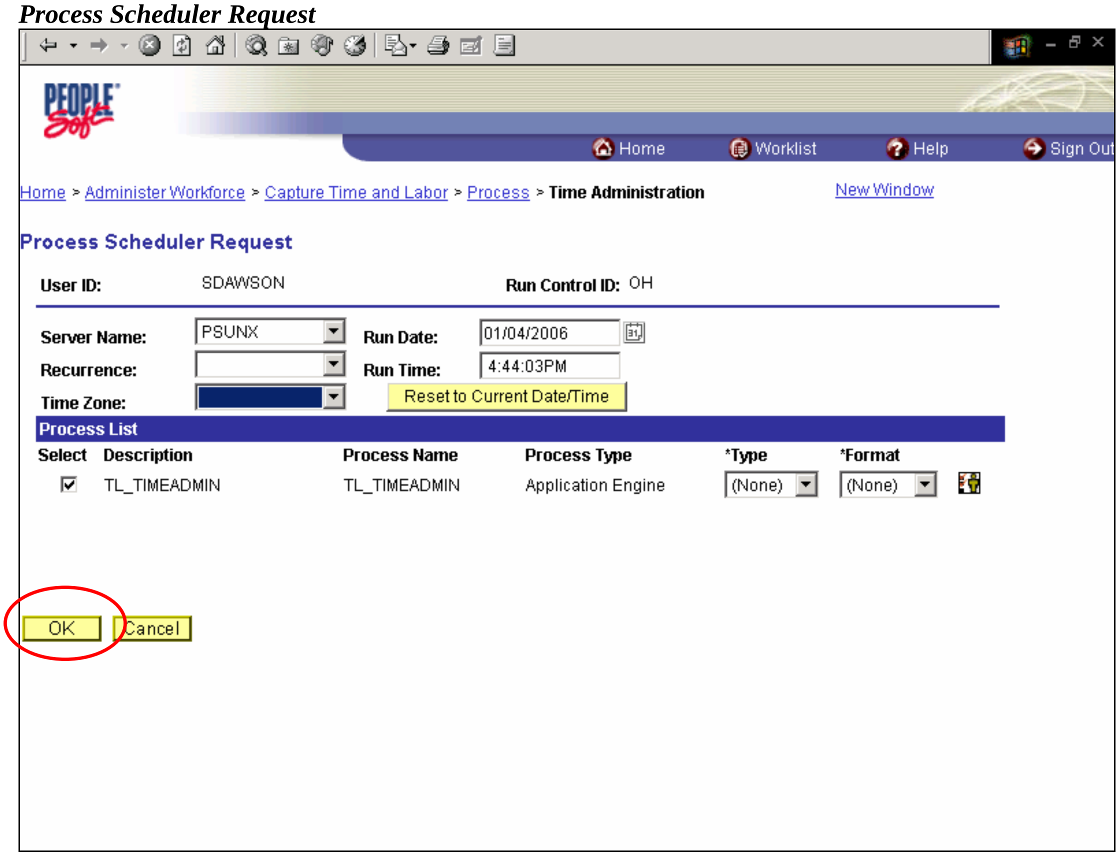
Administer Workforce** > **Capture Time and Labor** > **Process** > **Time Administration** > **Run Control



After clicking the Run button, another page is displayed. You can leave the defaults.

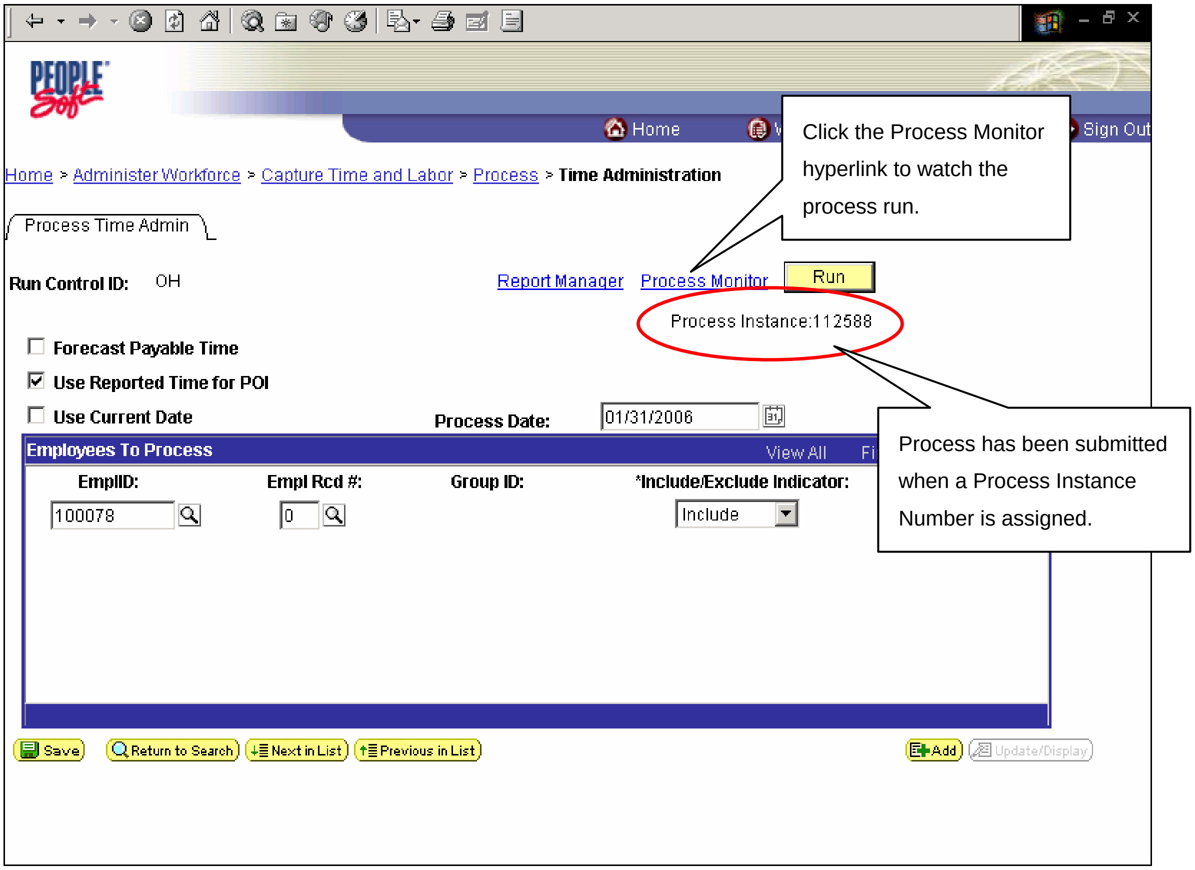
To begin the batch process you would click the 'OK' button.

Administer Workforce > Capture Time and Labor > Process > Time Administration > Process Scheduler Request



All processes will run on ***PSUNX*** with the ***exception of Crystal Reports*** – which run on ***PSNT.***

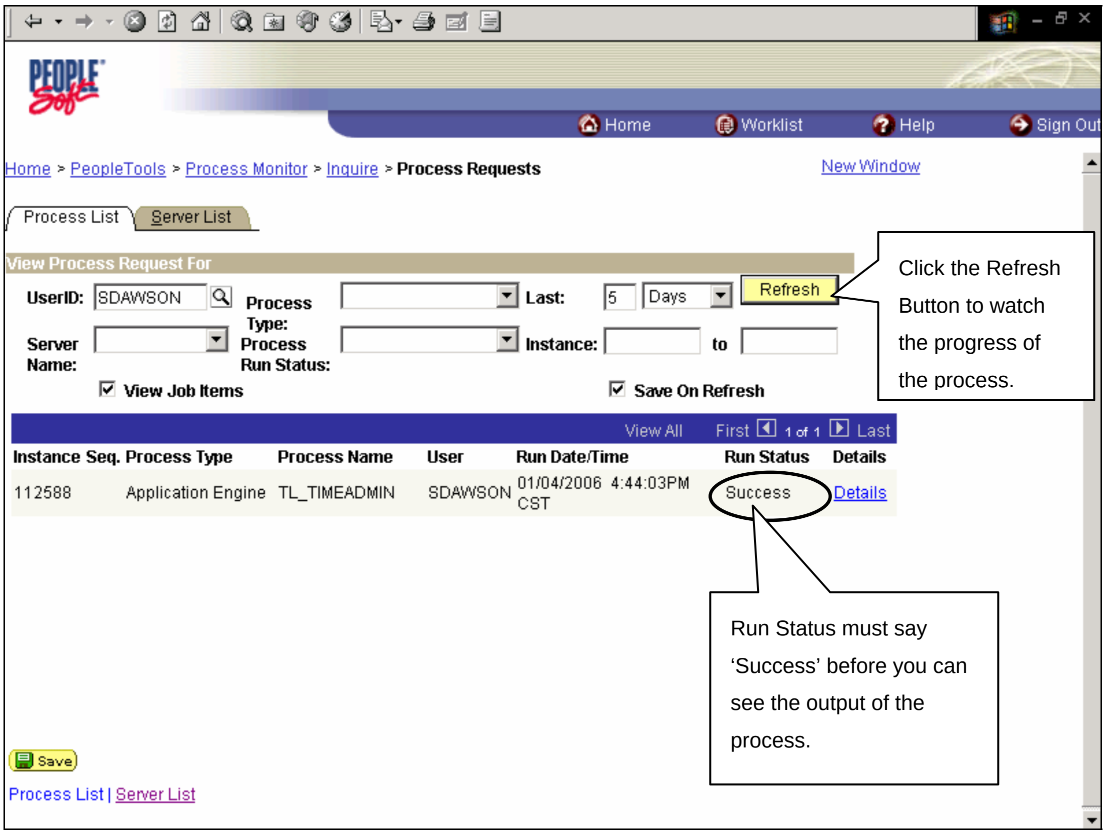
After clicking 'OK', you are taken back to the Time Administration Run Control page. Click the Process Monitor link to see the progress of the job.



The process instance number assigned is very important. If you experience a problem with the process running or dying on Process Monitor and need help from the Help Desk . ***You must give the process instance number to the Help Desk so that your issue can be researched***.

The Process Monitor will show all jobs based on the criteria you have entered at the top of the page (your User Id, Last number of Days, etc…).

The job will have a different status as it progresses. When completed, it will indicate a status of 'Success'. You can click the yellow 'Refresh' button occasionally to get an update on the status. You will get used to how long certain jobs take to run. As you might expect, the time it takes to process Time Administration is heavily dependent on the number of employees being processed.



When the process goes to '***Success***' – click on the blue ***Details hyperlink*** to get to the next page.

Select ***View Log/Trace blue hyperlink*** to get to the Message Log.

Message Log Output of Time Administration Process

```
PeopleTools 8.19.09 - Application Engine
Copyright (c) 1988-2006 PeopleSoft, Inc.
All Rights Reserved


2006-01-05-09.24.36.000000 -- Starting TL_TIMEADMIN (13507,13)

2006-01-05-09.24.40.000000 -- Starting TL_TA000200 (13507,13)

2006-01-05-09.24.41.000000 -- Starting TL_TA000300 (13507,13)

2006-01-05-09.24.43.000000 -- Starting TL_TA000400 (13507,13)

2006-01-05-09.24.43.000000 -- Starting TL_TA000410 (13507,13)

2006-01-05-09.24.43.000000 -- Starting TL_TA000420 (13507,13)

2006-01-05-09.24.44.000000 -- Starting TL_TA000500 (13507,13)

2006-01-05-09.24.45.000000 -- Starting TL_SCHRES_AE (13507,13)

2006-01-05-09.24.46.000000 -- Starting TL_TA000700 (13507,13)
09.24.47 UpdateStats ignored - COMMIT required\n

2006-01-05-09.24.48.000000 -- Starting TL_TA000800 (13507,13)

2006-01-05-09.24.48.000000 -- Starting TL_TA000900 (13507,13)

2006-01-05-09.24.53.000000 -- Starting TL_TA001000 (13507,13)

2006-01-05-09.24.54.000000 -- Starting TL_TA001100 (13507,13)

2006-01-05-09.24.54.000000 -- Starting TL_TA001200 (13507,13)

2006-01-05-09.24.54.000000 -- Starting TL_TA001300 (13507,1

========>                  100% of the job completed. (13507,981)
Application Engine program TL_TIMEADMIN ended normally
3507,981)
Application Engine program TL_TIMEADMIN ended normally
```

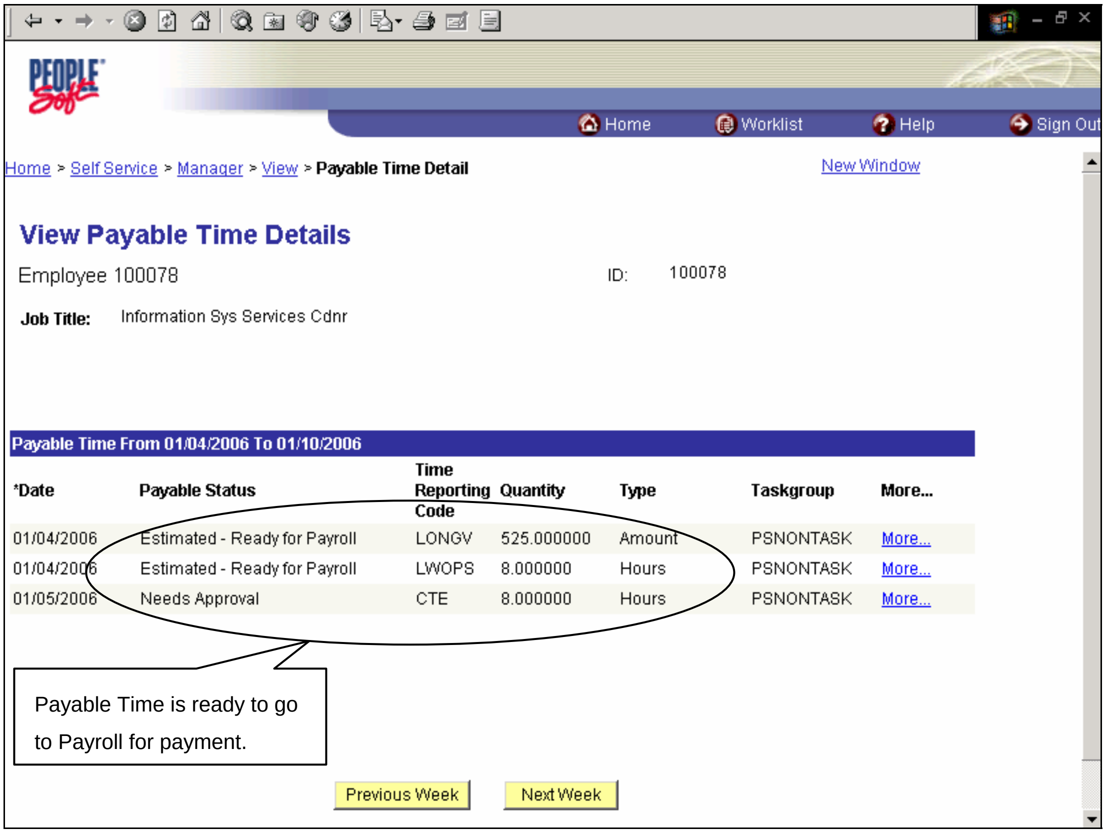
This line should be blank if the employee was processed

If you get the message on the 3rd line from the bottom - 'No Employees Available for Processing', this means you did not process any Weekly Elapsed Time for anyone.

After checking the Message Log, we have to go to check for '***payable time'*** for the time that was entered in Weekly Elapsed Time.

To check for payable time for this employee . . . .

Self Service > Manager > View > Payable Time Detail



Payable Time must be generated for the entries entered in Weekly Elapsed Time because only Payable Time is sent to Payroll.

VIEW PAYABLE TIME

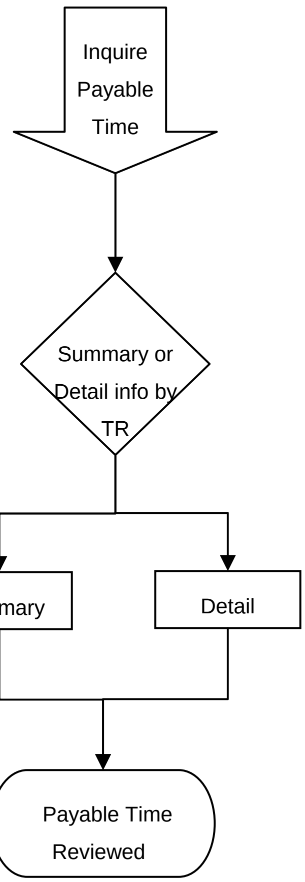
BUSINESS PROCESS FLOW

Payable Time is updated during Time Admin run. If time passes all edits, it becomes Payable Time and can be loaded to Payroll.

Time Reporter is any employee who has their time processed through the Time & Labor system.

Self Service > Manager > View > Payable Time Summary

Self Service > Manager > View > Payable Time Detail



There is also a Payable Time Report that can be run TL001. Refer to PeopleBooks for sample report.

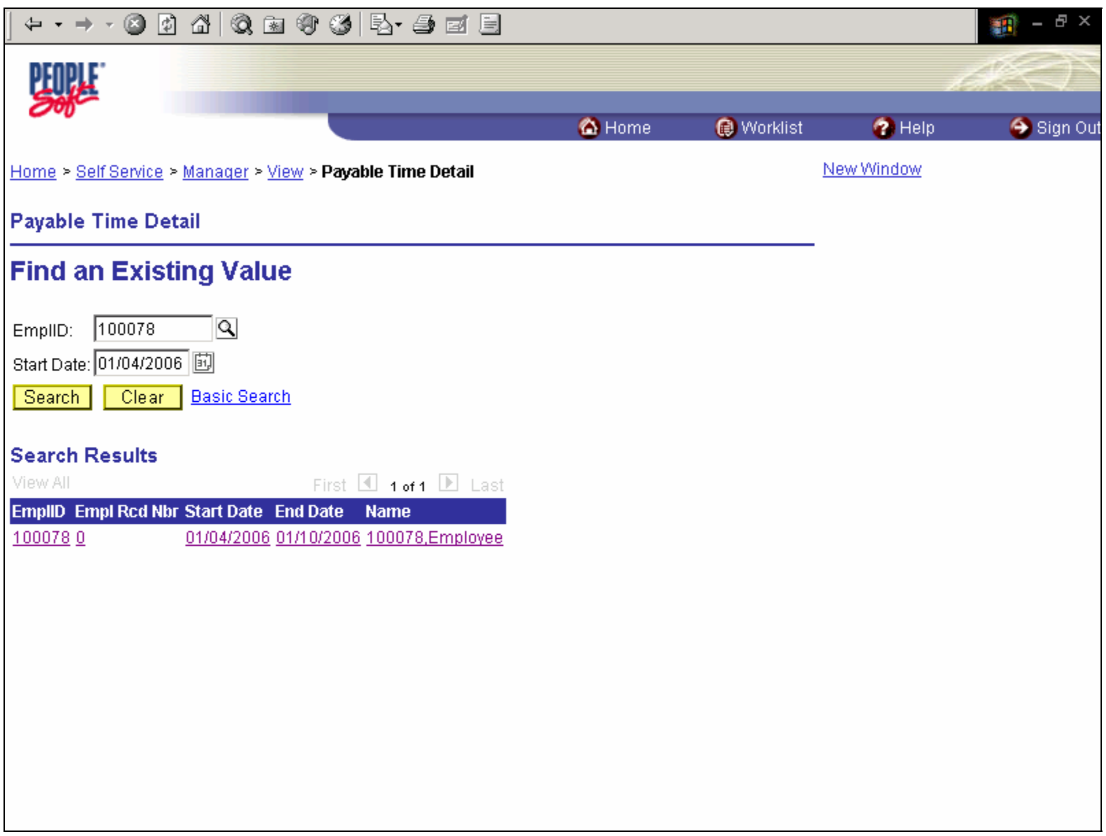
VIEWING PAYABLE TIME

Once the job is complete, Payable Time can be viewed.

To see the Payable Time we navigate to the Payable Time Detail page. You must enter both the EmplId and a Start Date. Note: Another shortcut in PeopleSoft is that you do not have to enter dashes or slashes when entering dates. For example, May 1, 2004 can be entered as 050104 rather than 05/01/2004.

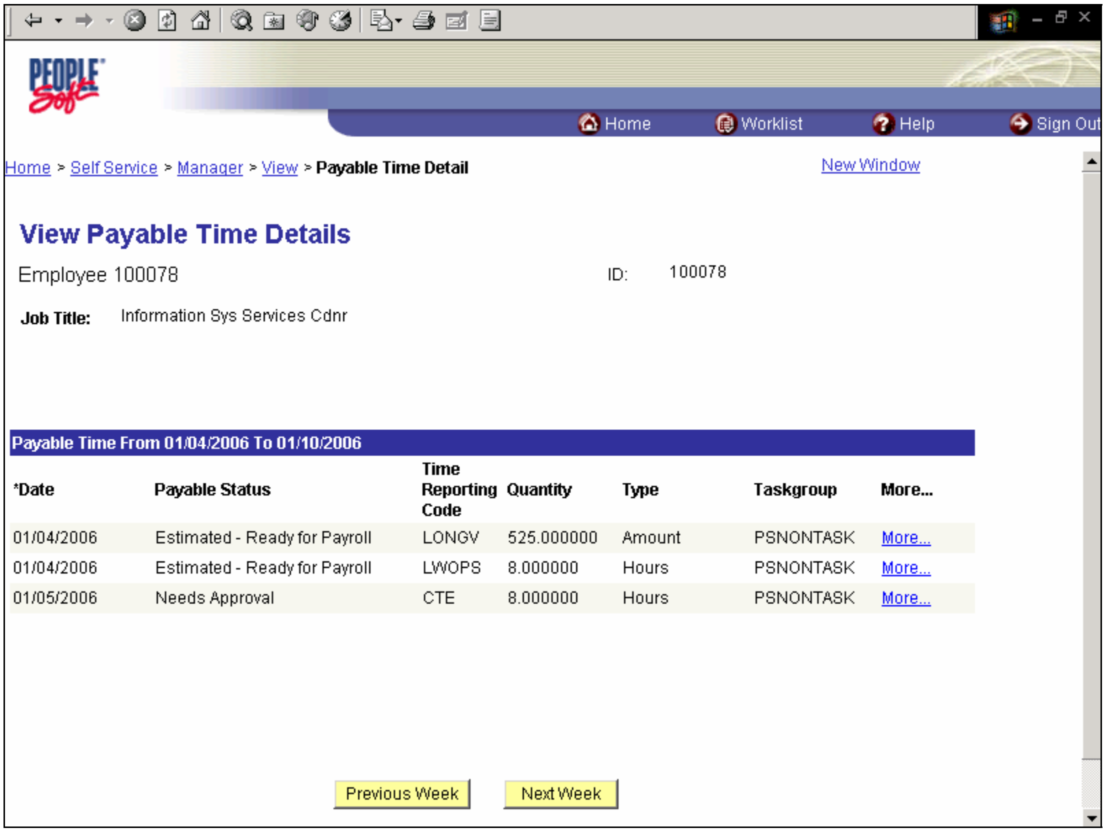
Both the Employee ID and Start Date (the date that the time was posted for) must be entered or you will receive an error. Enter a date of January 4, 2006 to see our time for Longevity, Leave without pay, scheduled and Comp Time Earned. .

Self Service > Manager > View > Payable Time Detail



Click the ***yellow Search button*** to go to the next page

The Payable Time Detail page shows the time per week.


Home | Worklist | Help | Sign Out

Home > Self Service > Manager > View > **Payable Time Detail** New Window

View Payable Time Details

Employee 100078 ID: 100078

Job Title: Information Sys Services Cdnr

Payable Time From 01/04/2006 To 01/10/2006

*Date	Payable Status	Time Reporting Code	Quantity	Type	Taskgroup	More...
01/04/2006	Estimated - Ready for Payroll	LONGV	525.000000	Amount	PSNONTASK	More...
01/04/2006	Estimated - Ready for Payroll	LWOPS	8.000000	Hours	PSNONTASK	More...
01/05/2006	Needs Approval	CTE	8.000000	Hours	PSNONTASK	More...

Previous Week | Next Week

This page shows the data that was entered on the Weekly Elapsed Time page and processed through Time Administration. The only field that is new to us is the Payable Status field. When Time Administration has processed the data, the Payable Status should be Estimated – Ready for Payroll. Once Payroll takes the data and starts processing it the status will change.

We see the results for the Comp Time we entered also. Notice that the Payable Status indicates Needs Approval. The reason this does not show a Payable Status of Estimated – Ready for Payroll is because employees do not get paid when they earn Comp Time. They get paid when they take Comp Time. While this row will remain in this status indefinitely, the employee's Comp Time balance will be updated to reflect the eight hours earned.

This is a good time to talk about the different status that Payable Time can have. The following table is from PeopleBooks and discusses the relevant statuses that will be encountered at the State of Oklahoma.

PAYABLE TIME STATUSES

Status	Description
ES – Estimated, Ready for Payroll	This is the first stage of payable time created by the Time Administration process, unless you've activated the Needs Approval option on the Workgroup page. It includes cost estimates calculated by Time Administration if you've selected the Calculate Estimated Gross option on TL Installation Page. Time Administration updates the original payable time whenever you change reported time that relates to payable time with a payable status of Estimated-Ready for Payroll.
NA - Needs Approval	This stage is like estimated payable time except that the time must be approved before it can be sent to a payroll system. You approve time using the Approve Payable Time page. Time Administration updates the original payable time whenever you change reported time that relates to payable time with a payable status of Needs Approval.
AP – Approved, Goes to Payroll	Approved payable time can be sent to your payroll system. When payable time reaches the approved stage, the system sets the frozen indicator on. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Approved-Goes to Payroll..
CL - Closed	Payable status is set to closed when any of the following conditions are met. (When payable time reaches the closed stage, the system turns on the frozen indicator.) • The Send to Payroll option is not activated for the time reporter (on the Create Time Reporter page). • The Send to Payroll option is not activated for the time reporting code (on the TRC Setup page). • The payable time represents a record adjustment made through the Adjust Paid Time page. • The payable time has been taken by Payroll, but it will not be labor distributed or diluted because you did not select the Labor Distribution and Dilution options on the Pay System page. (In this case, you'll see the Pay

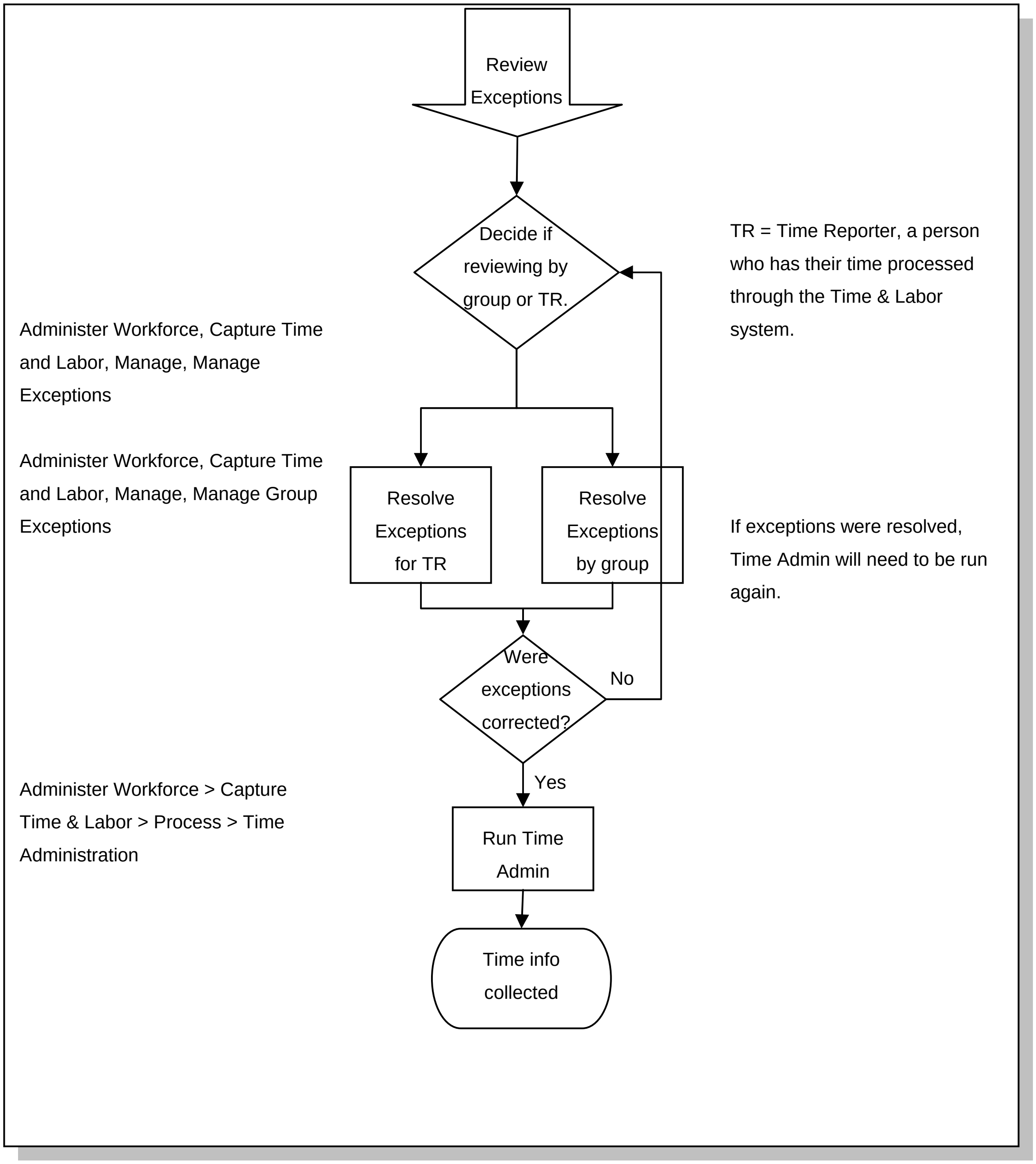
	System code and Pay Request Number on the View Payable Time Details page.) Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Closed.
SP - Sent to Payroll	Payable time is in a Sent to Payroll stage from the moment it's sent to Payroll to the time Payroll either takes or rejects the entry. When payable time reaches the Sent to Payroll stage, the system turns on the frozen indicator. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Sent to Payroll.
RP - Rejected by Payroll	Time that Payroll has refused. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Rejected by Payroll.
TP – Taken, Used by Payroll	Time has been accepted by Payroll. Time Administration creates offsetting entries whenever you change reported time that relates to payable time with a payable status of Taken — Used by Payroll.

As a rule. the State of Oklahoma will not be approving time. Time is considered approved before it is entered into PeopleSoft. However, there are a couple of exceptions to this rule. Time Reporting Codes that are not mapped to a Payroll Earn Code remain in a status of “Needs Approval”. For example Comp Time Earned (CTE) is not mapped to an Earnings Code. The reason is because employees do not get paid for earning Compensatory Time. They get paid when they take the time. ***The Time Reporting Code used when taking Comp Time is mapped to a Payroll Earnings Code.***

Annual Leave and Sick Leave entries that are adding time back to the employee’s respective balances, ***must be approved.*** These entries will have a minus in front of the hours on Payable Time.

Reviewing Exceptions

Business Process Flow

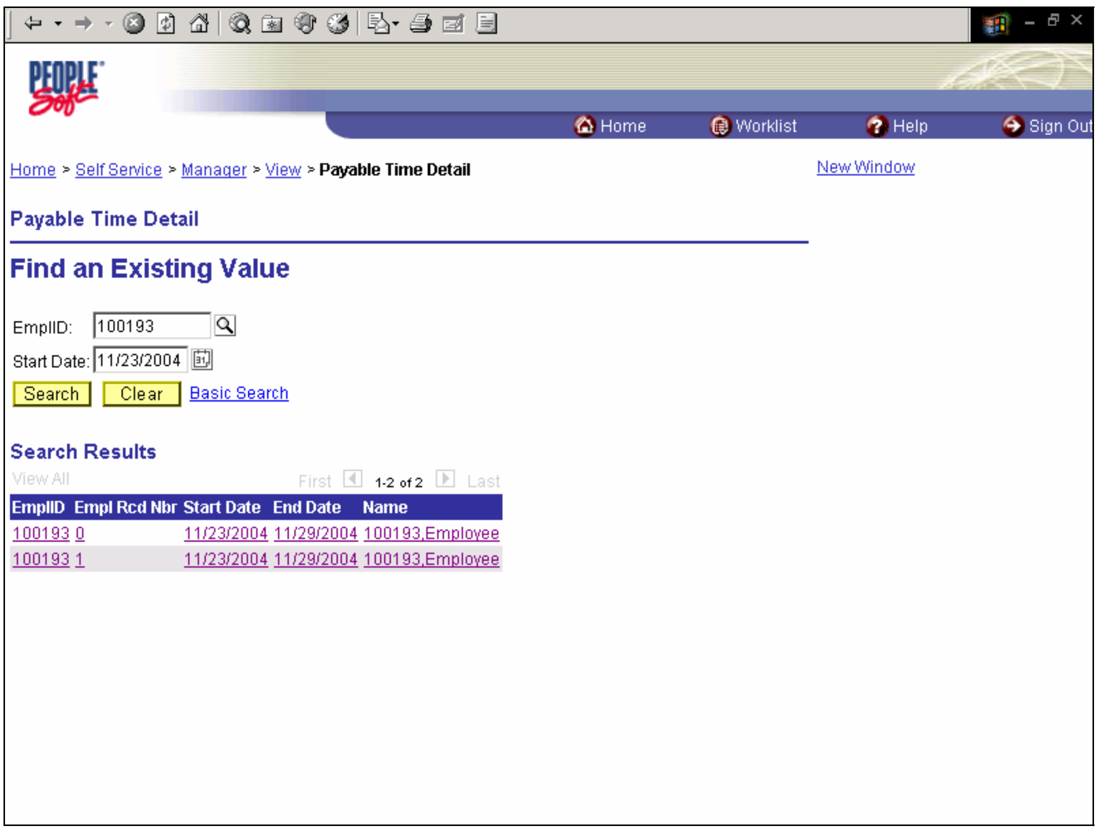


CHECKING FOR EXCEPTIONS

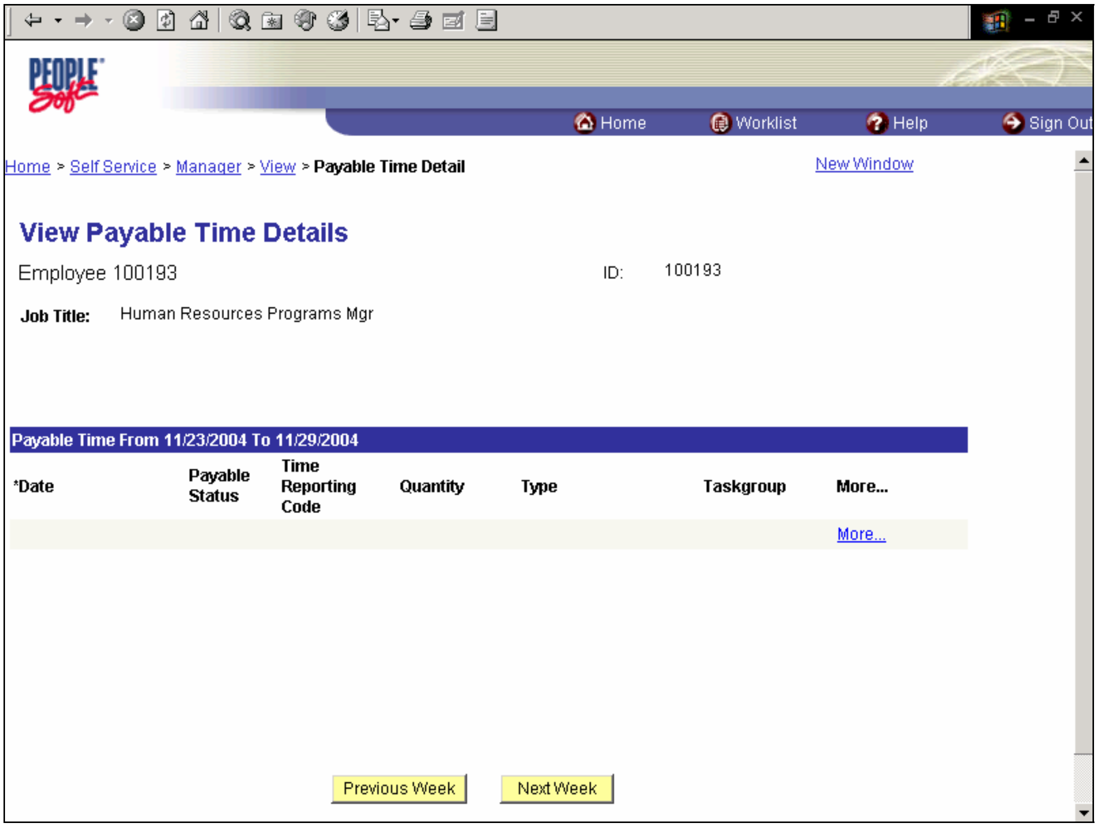
Occasionally, the Time Administration process will generate exceptions to prevent data from being processed incorrectly.   An exception will be generated indicating why the time could not be processed.

Once Time Administration is complete we would normally check the Payable Time page to ensure the time was processed. Since this employee has 2 job records, we will check both of them

Self Service > Manager > View > Payable Time Detail

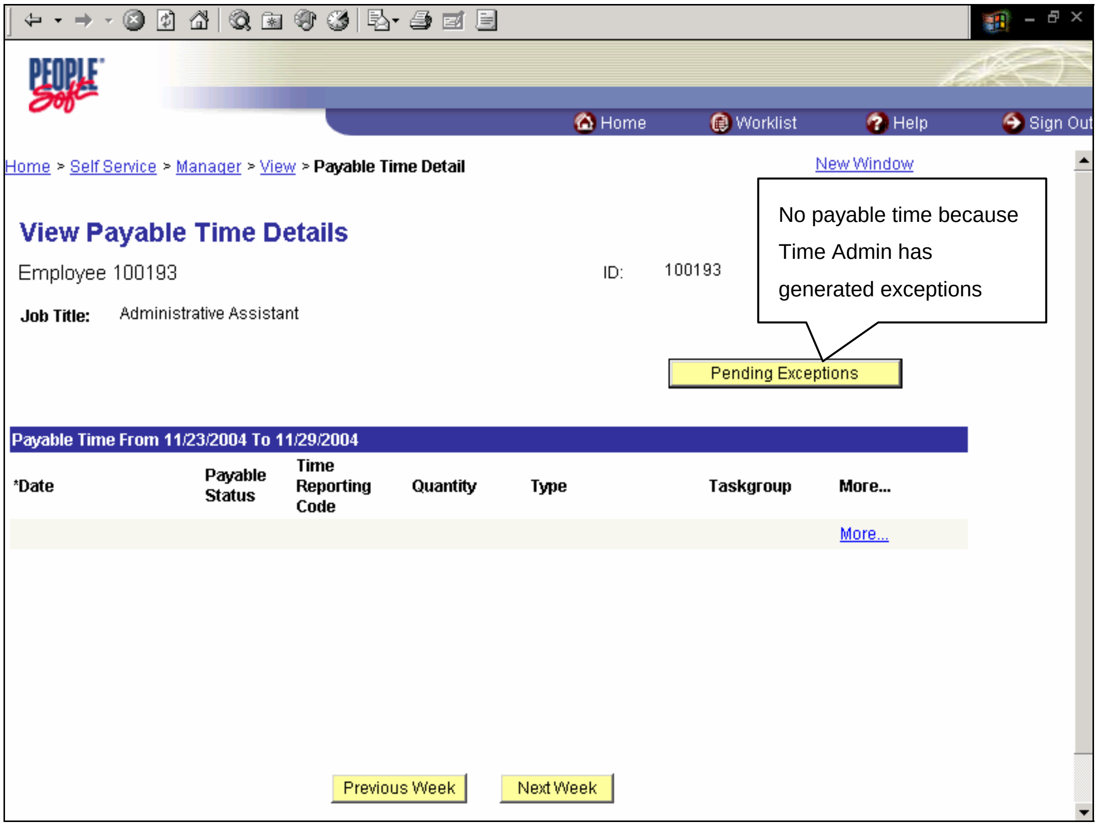


We check ***Record 0*** and it shows us this page.



No payable time shows on this page.

We go back and check ***Record #1*** and it shows us this page.



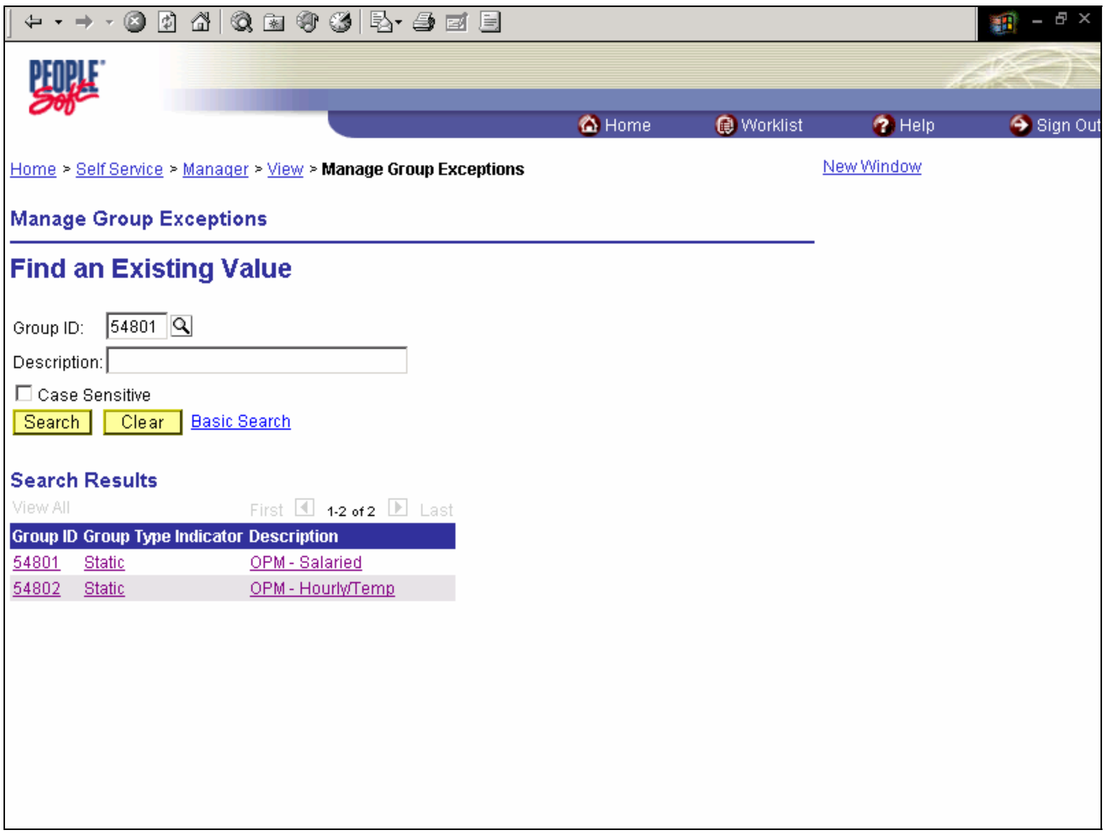
No payable time has been generated for Record #1 but it has flagged some time entered for Record #1 as having Exceptions with the Pending Exceptions bar. You can click on that bar and it will take you directly to the flagged exceptions.

Sometimes this message will be displayed. If you know that you really entered the correct Employee ID and the EXACT date you entered the time for in Weekly Elapsed Time - then you need to check from exceptions because Payable Time was not generated.

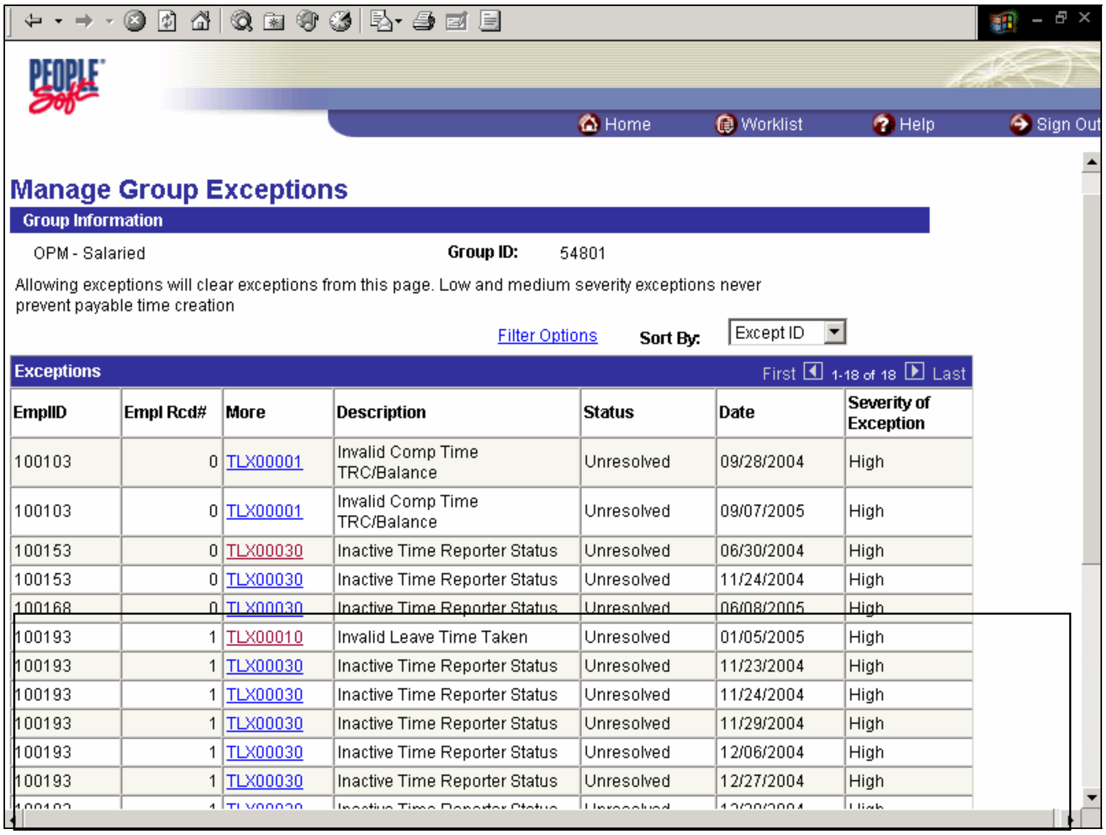
We can check for exceptions by group or employee to see if there are any exceptions. In our example, we'll look by group.

Enter Static Group Number and just click the search button once we navigate to the Manage Exceptions page.

MANAGE GROUP EXCEPTIONS



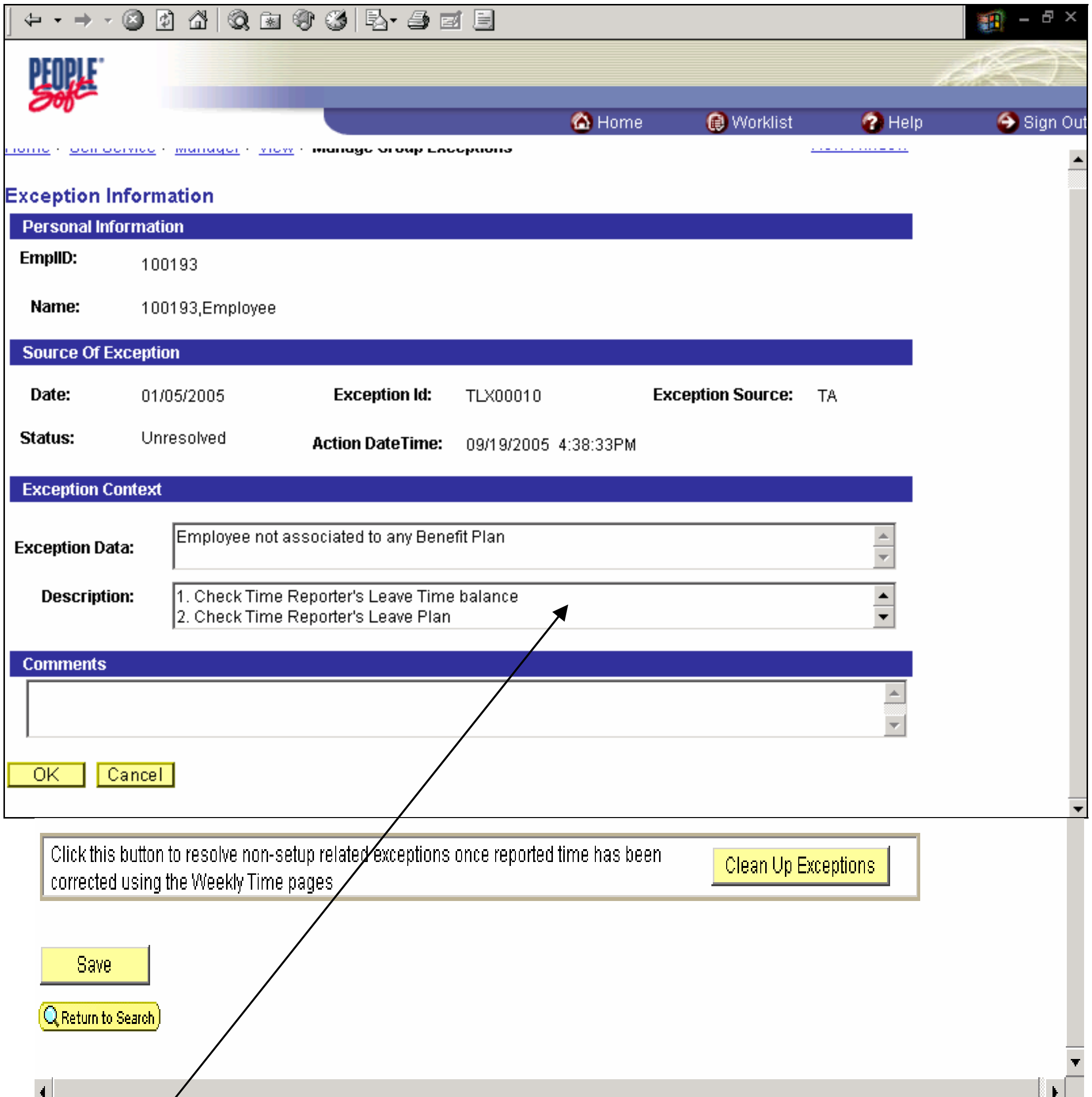
EXCEPTIONS DETAIL INFO



EmplID	Empl Rcd#	More	Description	Status	Date	Severity of Exception
100103	0	TLX00001	Invalid Comp Time TRC/Balance	Unresolved	09/28/2004	High
100103	0	TLX00001	Invalid Comp Time TRC/Balance	Unresolved	09/07/2005	High
100153	0	TLX00030	Inactive Time Reporter Status	Unresolved	06/30/2004	High
100153	0	TLX00030	Inactive Time Reporter Status	Unresolved	11/24/2004	High
100168	0	TLX00030	Inactive Time Reporter Status	Unresolved	06/08/2005	High
100193	1	TLX00010	Invalid Leave Time Taken	Unresolved	01/05/2005	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/23/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/24/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/29/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	12/06/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	12/27/2004	High

Click on the blue hyperlink in the ***More*** column to go to an explanation for that specific exception. ***We will look at TLX00010 – Invalid Leave Time Taken.***

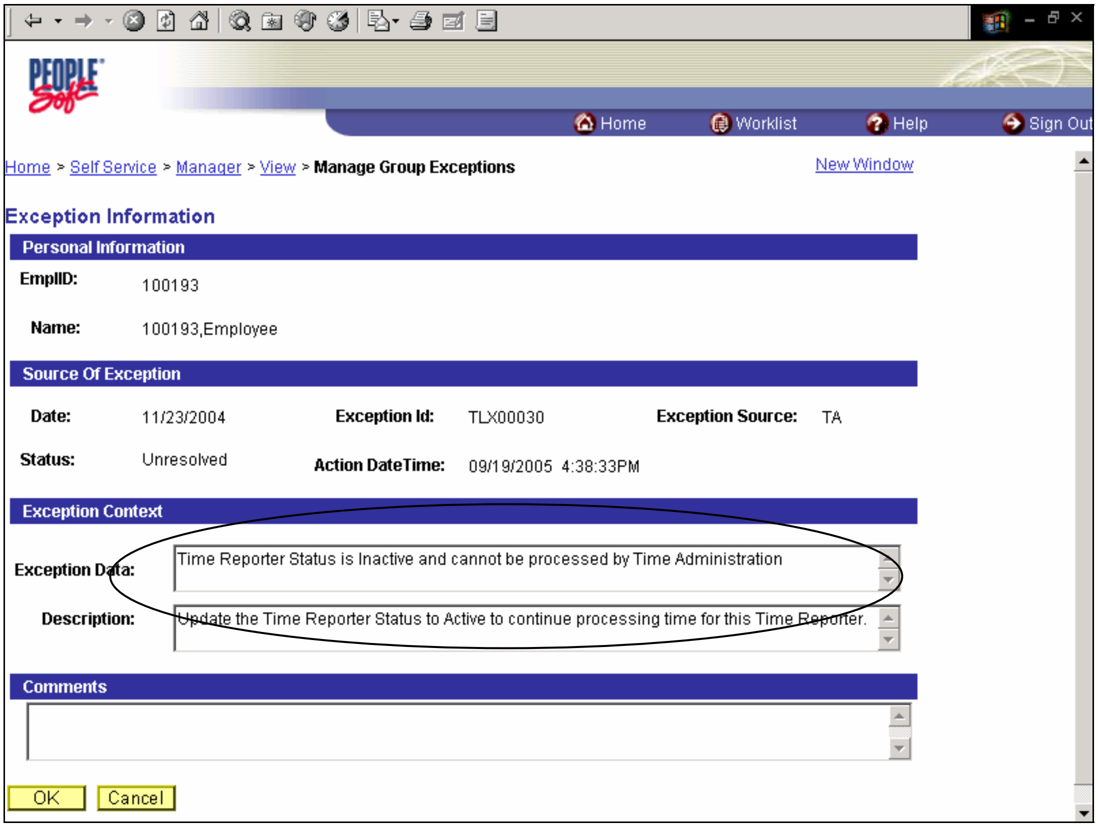
Exception TLX00010 – for employee 100193 is shown below.



Only the first two possible reasons are visible in the box. Use the scroll arrows on the right hand of the box to see the other possible reasons for the error condition. All 6 of them are listed below.

1. Check Time Reporter's Leave Time balance
2. Check Time Reporter's Leave Plan
3. Leave TRC may be mapped to a NA Earnings Code that is not mapped to a Leave Plan Type
4. Time Reporter may not have a Leave Plan
5. A Negative Balance may not be allowed on the Leave Plan
6. Leave Time may exceed Max Negative Hours allowed on Leave Plan

Now – we are looking at the exception ***TLX00030*** – for this same employee



The exception message tells us that the Time Reporter Status is Inactive and Time Admin cannot process time for an Inactive Reporter.

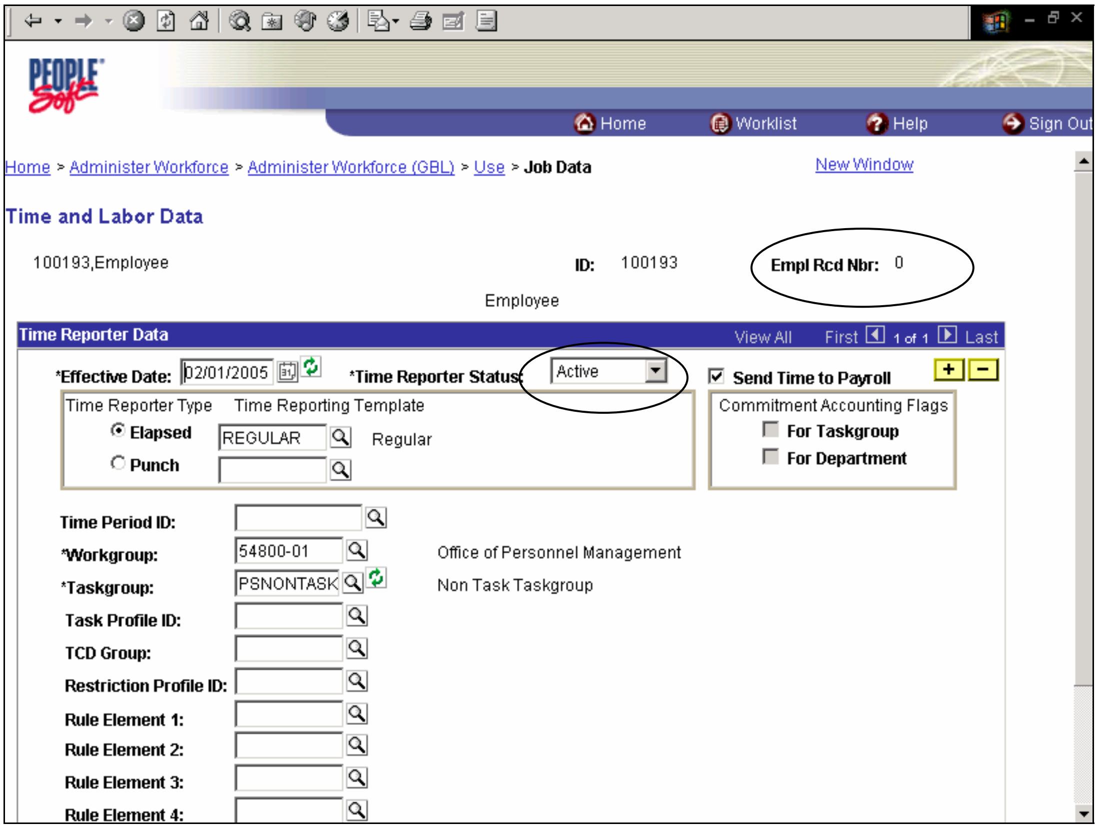
So – we have two choices to pick from.

Choice 1 – We entered the time in error and shouldn't have. In this case, we go back to Weekly Elapsed Time and delete out the time for this employee on the specific days, Save the Page and run Time Admin again to clear up this exception.

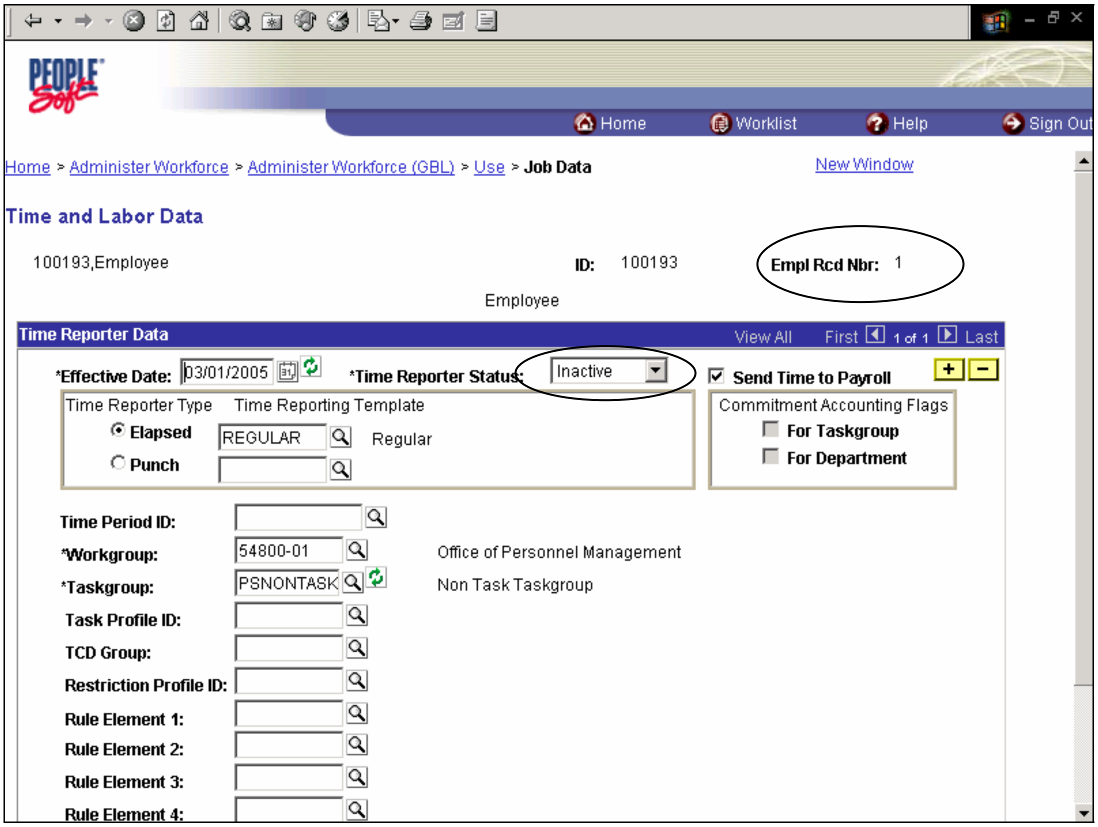
Choice 2 – We have to pay this employee for this time so that means we have to go to the Time Reporter Page to check out the problem.

Since this employee has 2 JOB Records, the employee will also have 2 Time Reporter Pages – one for each of the JOB Records.

Time Reporter Page – Employee Record #0 – shows the status to be Active.

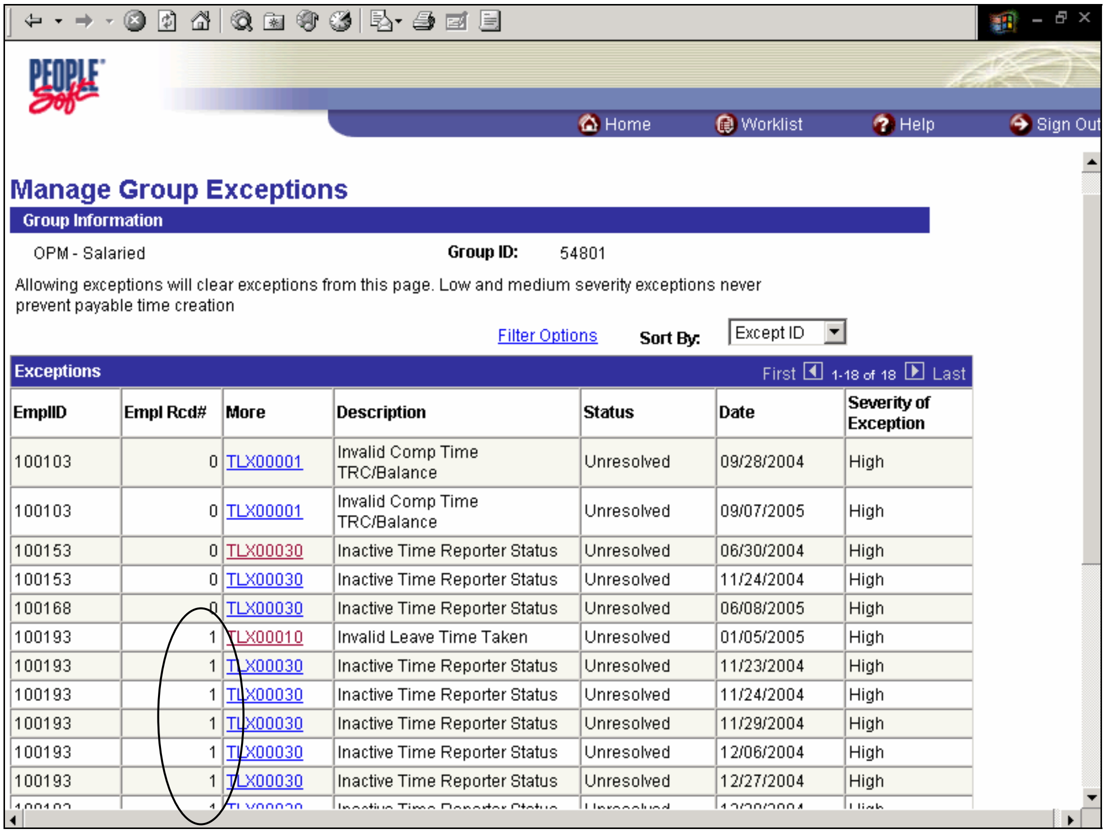


Time Reporter Page – ***Record #1 – shows the status to be INACTIVE***.



Home
Worklist
Help
Sign Out
Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data
New Window
Time and Labor Data
100193,Employee
ID: 100193
Empl Rcd Nbr: 1
Employee
Time Reporter Data
View All
First 1 of 1 Last
*Effective Date: 03/01/2005
*Time Reporter Status: Inactive
Send Time to Payroll
Time Reporter Type
Time Reporting Template
Elapsed
REGULAR
Regular
Punch
Commitment Accounting Flags
For Taskgroup
For Department
Time Period ID:
*Workgroup: 54800-01
Office of Personnel Management
*Taskgroup: PSNONTASK
Non Task Taskgroup
Task Profile ID:
TCD Group:
Restriction Profile ID:
Rule Element 1:
Rule Element 2:
Rule Element 3:
Rule Element 4:

When we look at the Manage Group Exceptions Page again for ***Employee 100193*** – we see that the time that is flagged with an exception is for ***Record #1*** – the record that has an ***INACTIVE status***.



Manage Group Exceptions

Group Information

OPM - Salaried **Group ID:** 54801

Allowing exceptions will clear exceptions from this page. Low and medium severity exceptions never prevent payable time creation

Filter Options **Sort By:** Except ID

Exceptions First 1-18 of 18 Last

EmplID	Empl Rcd#	More	Description	Status	Date	Severity of Exception
100103	0	TLX00001	Invalid Comp Time TRC/Balance	Unresolved	09/28/2004	High
100103	0	TLX00001	Invalid Comp Time TRC/Balance	Unresolved	09/07/2005	High
100153	0	TLX00030	Inactive Time Reporter Status	Unresolved	06/30/2004	High
100153	0	TLX00030	Inactive Time Reporter Status	Unresolved	11/24/2004	High
100168	0	TLX00030	Inactive Time Reporter Status	Unresolved	06/08/2005	High
100193	1	TLX00010	Invalid Leave Time Taken	Unresolved	01/05/2005	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/23/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/24/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	11/29/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	12/06/2004	High
100193	1	TLX00030	Inactive Time Reporter Status	Unresolved	12/27/2004	High

So – the question is – 1. did we enter the Weekly Elapsed Time for the wrong Employee Record #1 –
2. did someone help us and inactivate the Employee Record #1 too soon?

Solution for Option #1.

If we entered the Weekly Elapsed Time for the wrong Employee Record – it was determined that the time should have been entered for Employee Record 0 –

To correct this situation – we go back to Weekly Elapsed Time

Self Service > Manager > Tasks > Weekly Elapsed Time > Employee 100193 – Record #1

Delete the rows that have the time on it for this employee and ***SAVE*** the record.

Return to Search and select **Record #0** for this employee and enter the time on the correct days for employee number 100193 and ***SAVE*** the record.
Run Time Admin again and it should clear up the exception on Record #1 and generate Payable

Time for Record #0.

Solution for Option #2.

If the Time Reporter Page was inactivated before we finished paying this person, the status must Be changed back to Active to allow Time Admin to process the time entered against this Employee Record #1.

The only way to change the status back to Active for this record is by using Correct History and you do not have the security that will allow you to make the change.

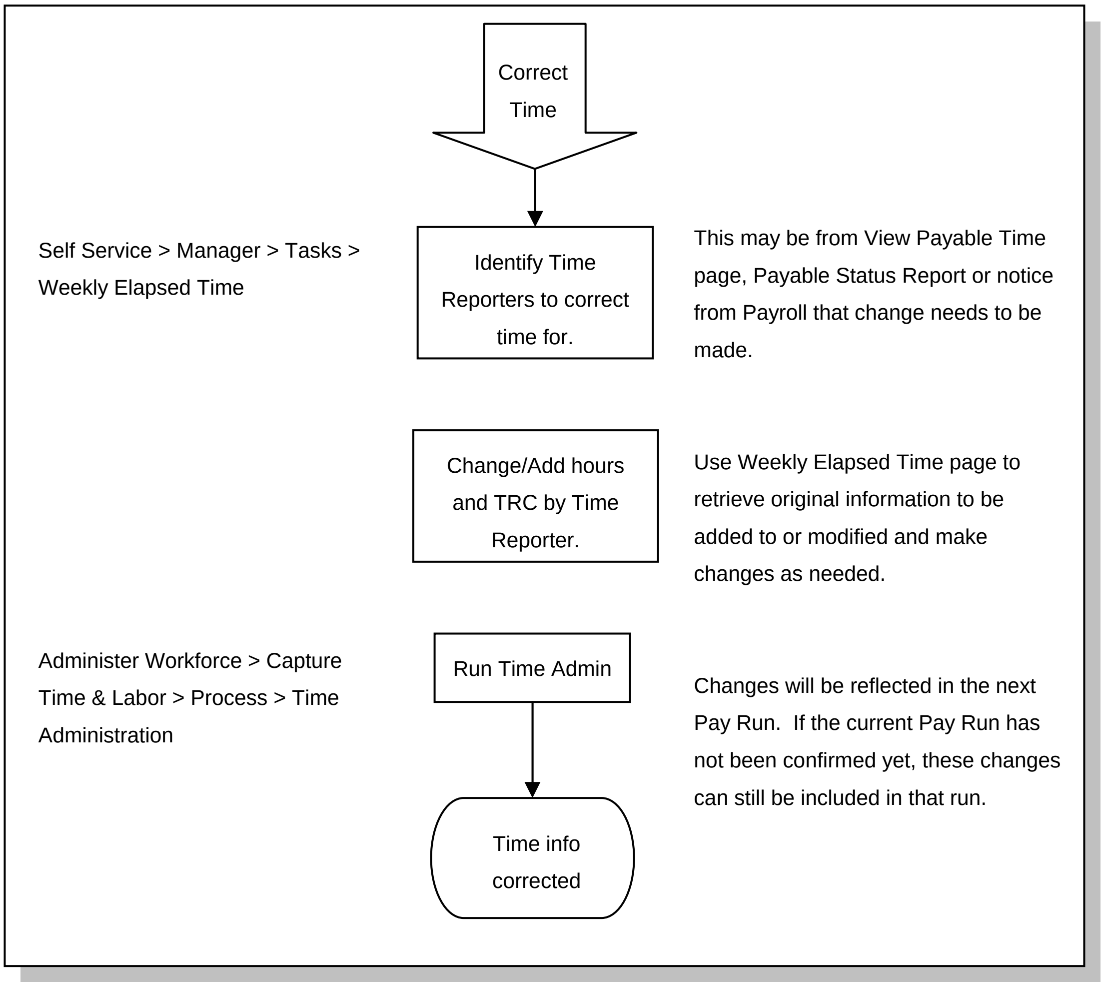
Call the Help Desk and file a case with them explaining the problem and they will send it to the CORE Payroll Team who will make the correction for you and let you know when it is done so that you can continue your payroll. Please give the Process Instance – if applicable - when filing a Help Desk Case.

After the CORE Team calls you, the next step is running Time Admin again which will clear up the Exceptions and generate payable time for those rows. Payable Time will then be pulled into Payroll to get the employee paid.

Once Time Administration is complete we would normally check the Payable Time page to ensure the time was processed successfully. If we have Payable Time, we don't have to check the Manage Exceptions Page again.

CORRECTING TIME

BUSINESS PROCESS FLOW

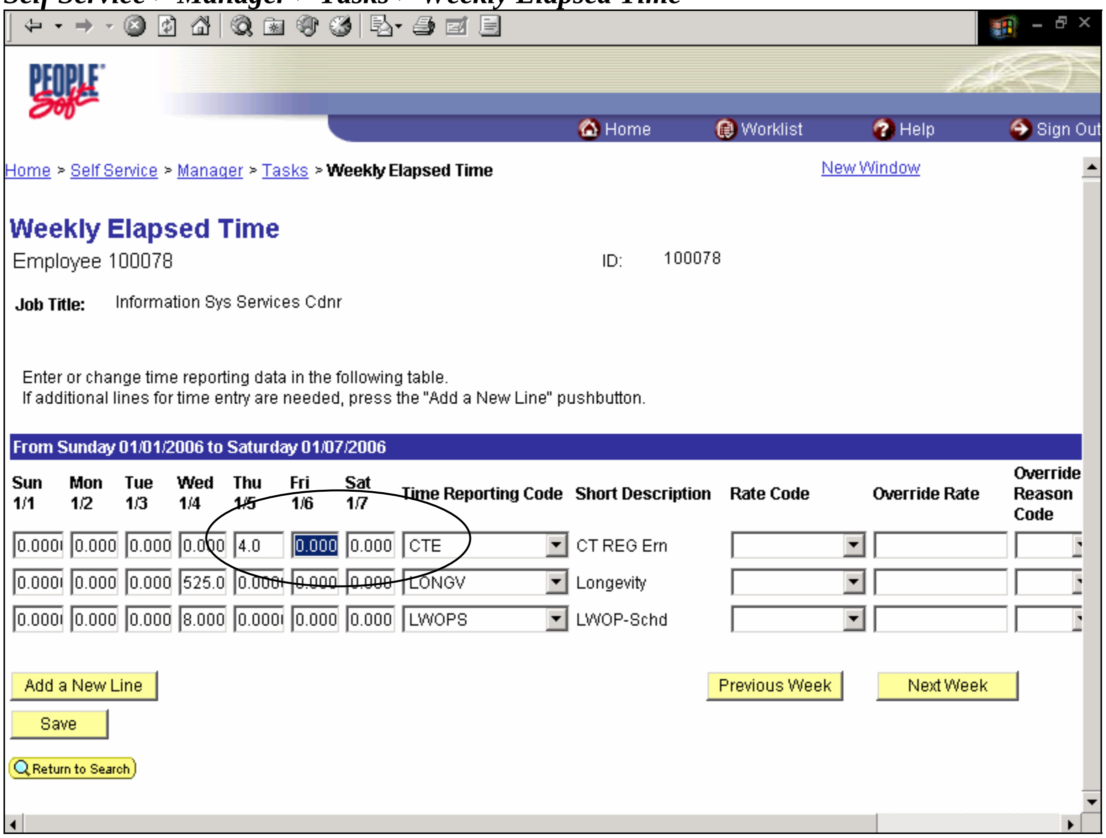


As mentioned, earlier time can be corrected before Payroll starts processing it. In fact, time can be changed up until Payroll runs the Confirm process. So let's assume that we recorded the Comp Time Earned for Employee 100078 incorrectly. It should have been 4 hours of Comp Time Earned instead of 8 hours.

Bring up the Weekly Elapsed Time page again and make the correction by overkeying the Original 8 hours with the correct value of 4 hours.

WEEKLY ELAPSED TIME

Self Service > Manager > Tasks > Weekly Elapsed Time

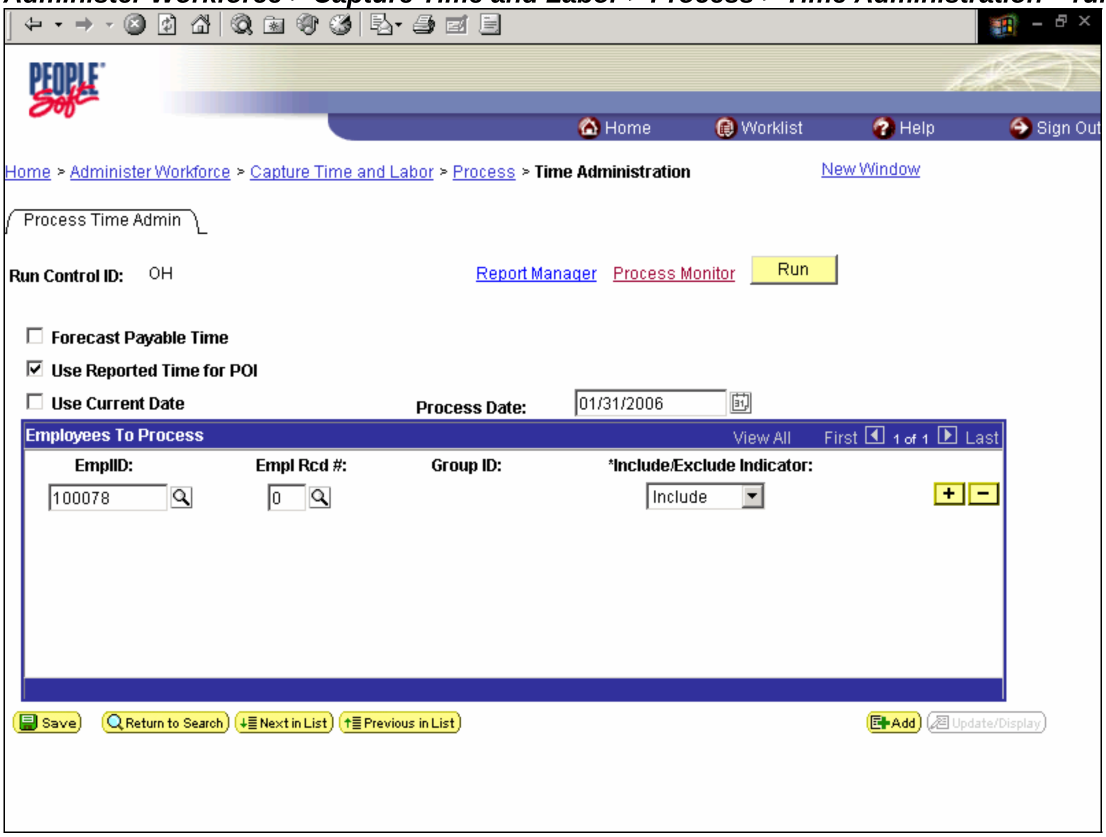


SAVE this record.

TIME ADMINISTRATION PROCESS

Next, we need to run Time Administration again to process the time. We don't need to change any of the parameters on this page so we will just click the Run button.

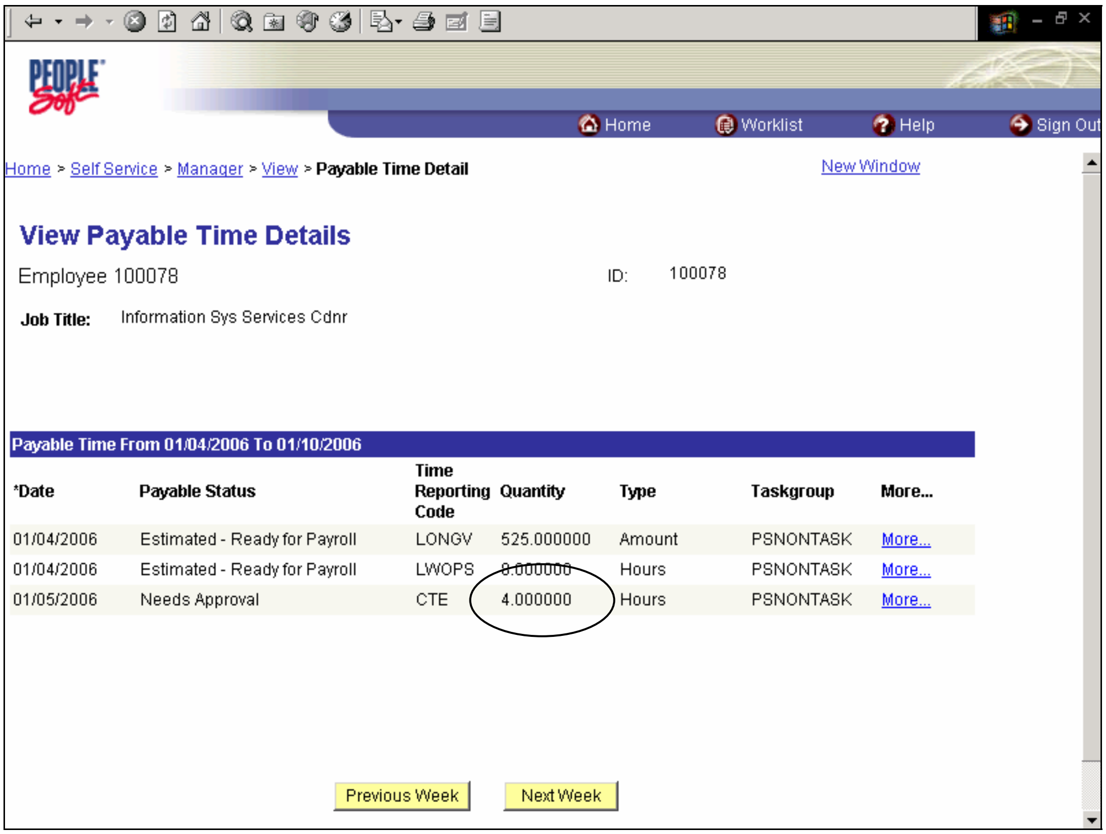
Administer Workforce > Capture Time and Labor > Process > Time Administration – run control



PAYABLE TIME DETAIL

After getting a Run Status of ‘Success’, we will take a look at the Payable Time and see that our hours now indicate 4.

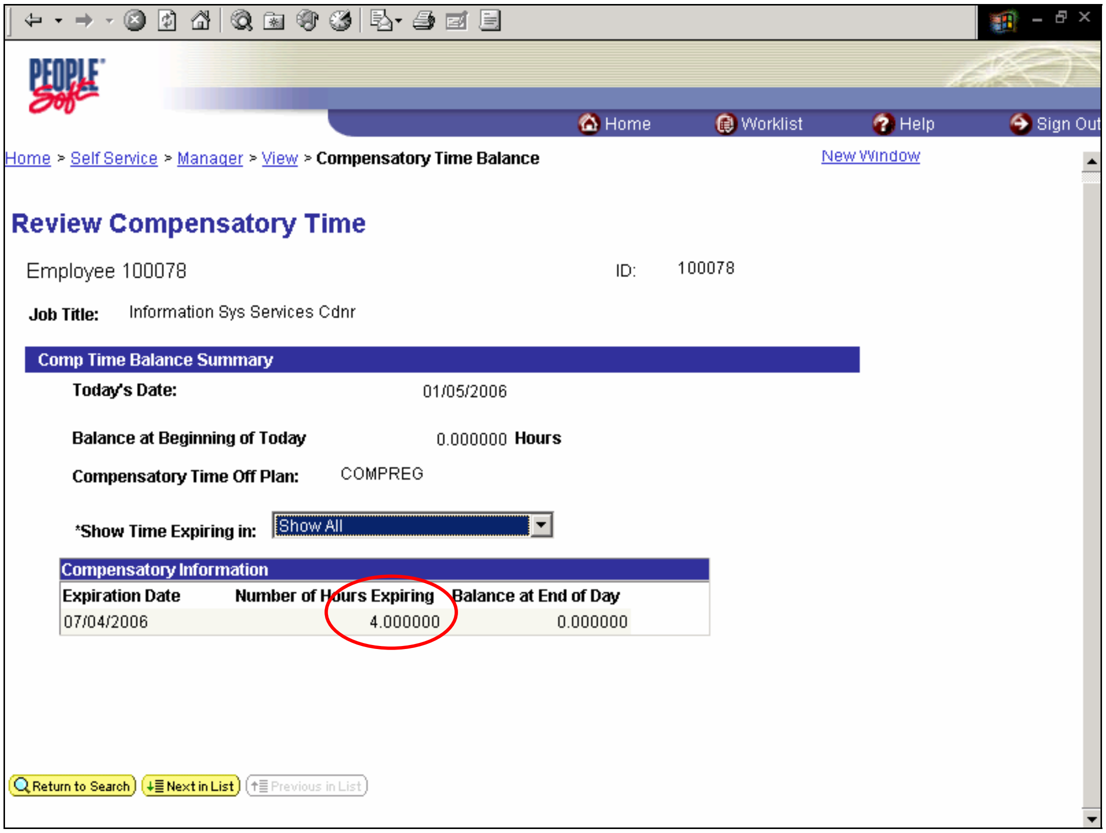
Self Service > Manager > View > Payable Time Details



COMPENSATORY TIME BALANCE

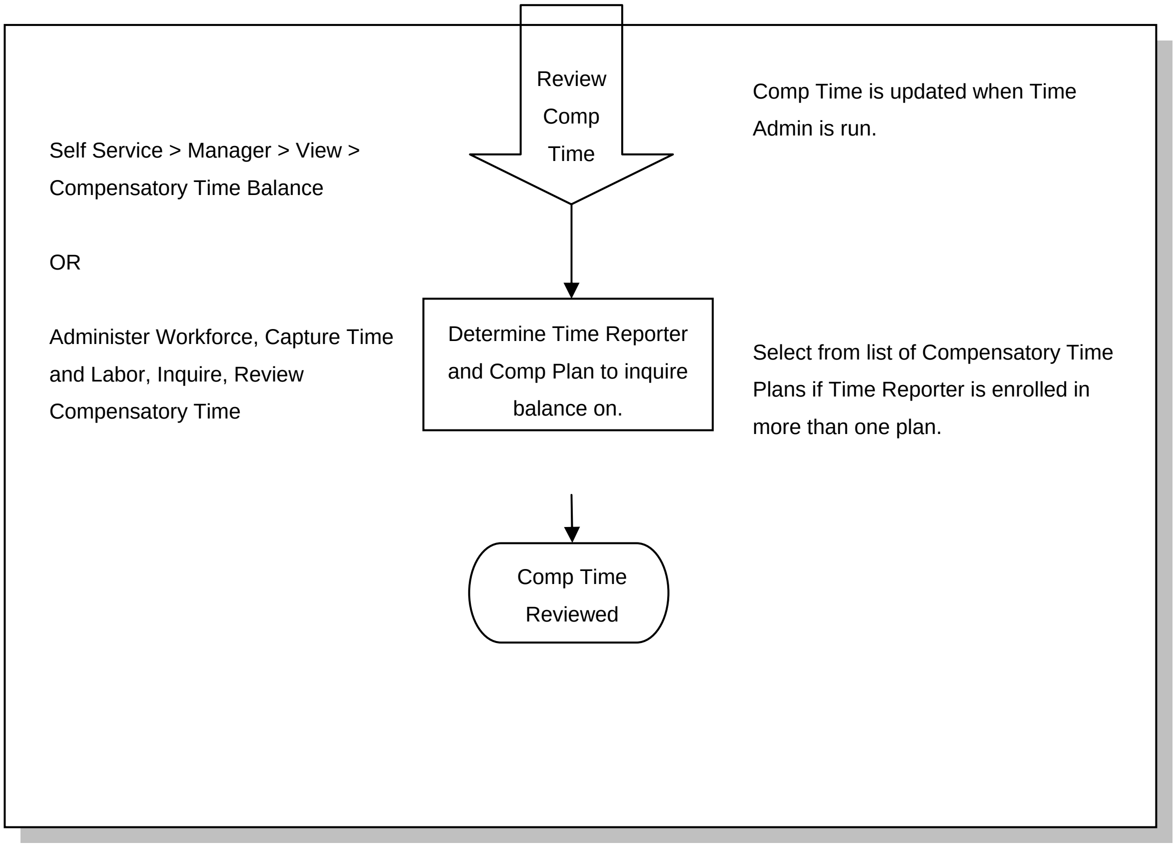
Lastly, we look at the Compensatory Time Balance page and see the change reflected there as well.

Self Service > Manager > View > Compensatory Time Balance



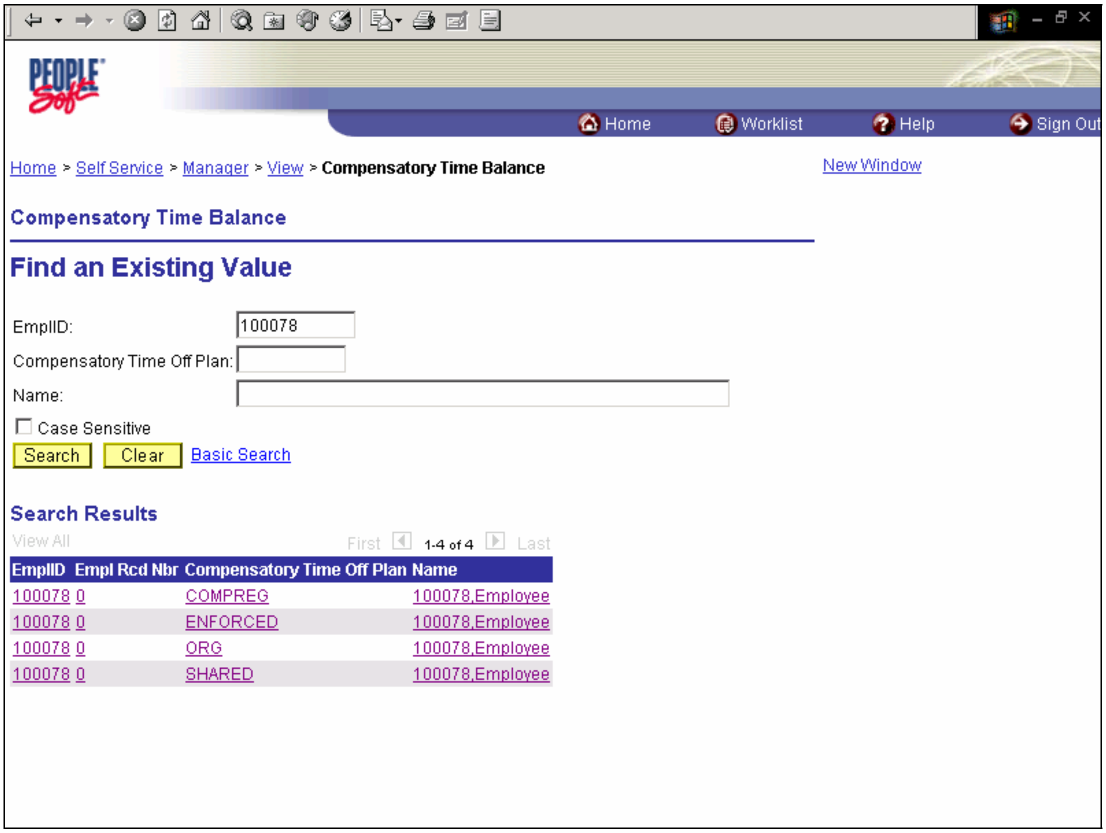
VIEW COMPENSATORY TIME BALANCE

BUSINESS PROCESS FLOW



CHECKING A COMPENSATORY TIME BALANCE

You can view an employee's Compensatory Time Plan balance using an online inquiry page. Navigate to the Compensatory Time Balance page and enter the EmplID. You can also enter a Comp Plan or click the search button and select from the list if they are enrolled in more than one plan.

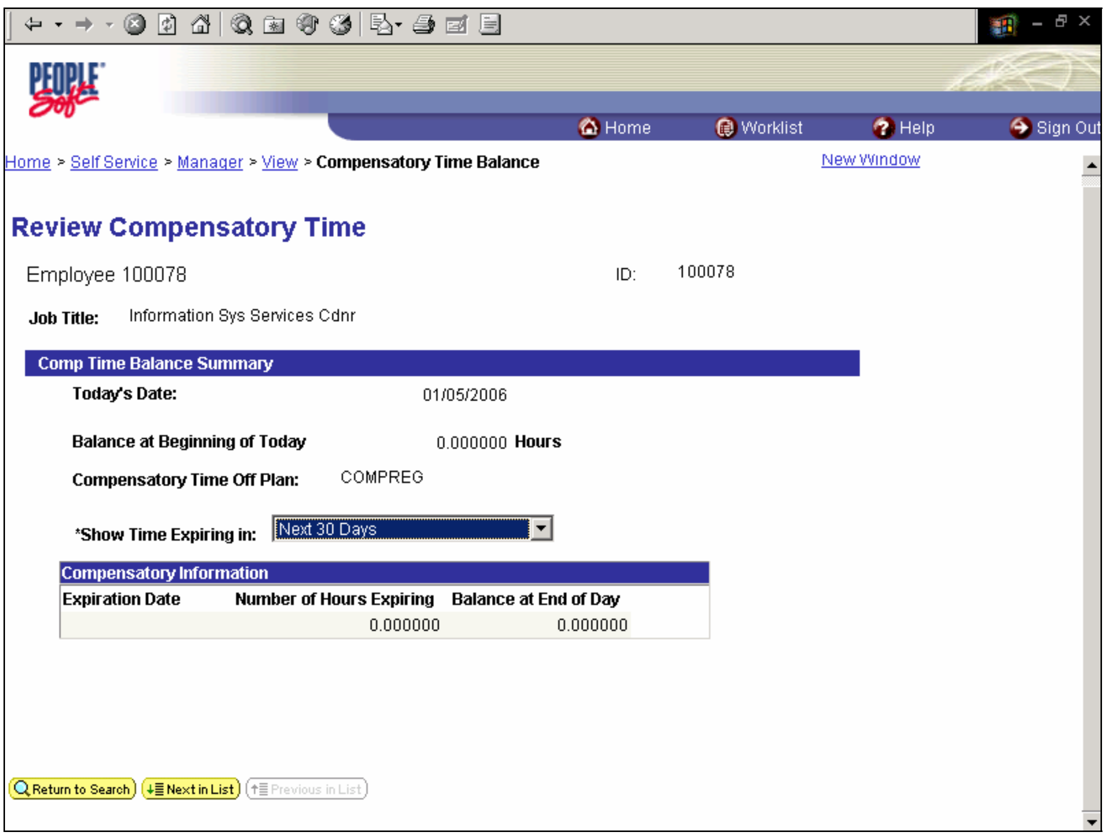


Click Comp Plan to review.

Currently, the page shows no hours. You might expect the Balance at the Beginning of Today to be equal to 8 and the number of hours expiring within a certain period to also be 8. Remember, that we entered the 8 hours of Comp Time Earned on May 19th. As you can see from the screen print, the current date is May 13th. Therefore, it indicates that as of May 13th the employee has not earned this Comp Time yet.

NOTE: The 'Show Time Expiring In' field is currently set to 30 days. The COMPREG Comp Time Plan is setup so if time is not taken it will expire in 180 days. Therefore, there is no time expiring in the next 30 days.

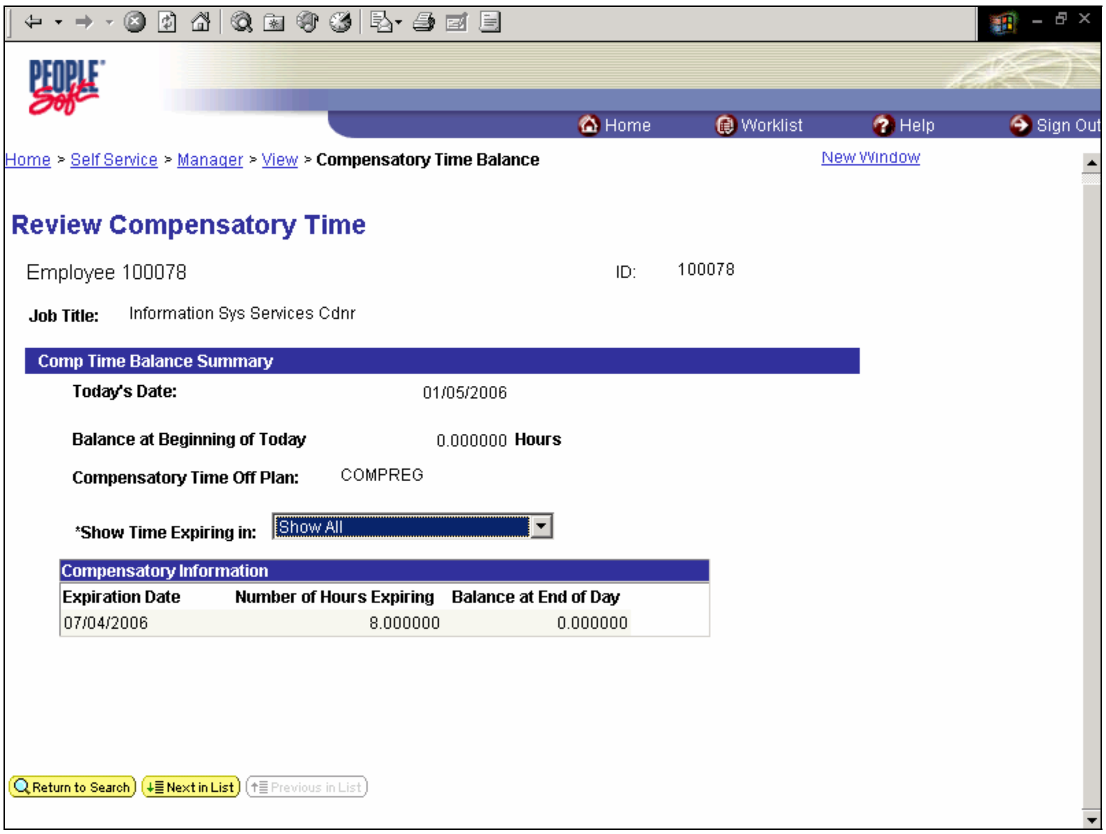
Self Service > Manager > View Compensatory Time Balance



Show All on Review Compensatory Time Page

Self Service > Manager > View > Compensatory Time Balance

If we change the 'Show Time Expiring In' option to 'Show All', as shown below,



the page automatically refreshes and we can see that 8 hours will expire 6 months from the date of entry.

PROCESSING COMP TIME

OVERVIEW

All the comp time entries – comp time earned, comp time taken, comp time shared, comp time given and comp time received are entered into the Weekly Elapsed Time Page in Time and Labor. These entries are processed by Time Administration and the information and balances remain in Time and Labor.

The State of Oklahoma has designed and uses a Leave Statement. This Leave Statement pulls the comp time information from Time and Labor and prints it along with the other kinds of leave that employee has available.

The following is a list of the predefined Comp Time Off Plans for the State of Oklahoma.

Comp Time Off Plans

COMPCORE	*Comp Core Project*
COMPPUB	*Comp Time Plan – Public Safety*
COMPREG	*Comp Time – Regular*
COOLOFF	*Admin Leave – Cool Off (32 hours)*
ENFORCED	*Enforced Leave Plan – (80 hours)*
HOLIDAY	*Holiday Leave Plan*
MILITARY	*Military Leave – (240 hours)*
ORG	*Organizational Leave – (24 hours)*
SHARED	*Shared Leave*
SHLFNOTERM *(accumulator)*	*Shared Life Non Term – (2088 hours which is 261 days)*
SHLFTERM *(accumulator)*	*Shared Life Term – (2920 hours which is 365 days)*

When using ***Shared Leave****, you must also post the time taken to either* ***SHLFNOTERM*** *or* ***SHLFTERM****. These two are used to accumulate the total hours that have been taken.*

The employee must be ***hired*** (usually done by HR) and ***enrolled*** in a Static Group (usually done by payroll) and in whatever comp time plans (usually done by payroll) for which they are eligible before any type of comp time (earned or taken) can be entered into Time and Labor – Weekly Elapsed Time for that employee.

The employee must also have a Comp Time Balance for the specific plan with a date prior to the date you want to enter Comp Time Taken into Time and Labor - Weekly Elapsed Time.

COMP TIME PLANS AND THEIR TRCS

In the section of this manual entitled "***Enrolling Time Reporters***", we enrolled employee **100078** into Static Group **54801**.

We also enrolled this employee into Comp Time Off Plans of **Enforced, Org, CompReg, Shared, and Shlfnoterm.** The following is a list of the Comp Time Off Plans and the TRCS that affect
them.

<u>Time Reporting Codes for the COMPREG Comp Time Plan</u>

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
CTE	Comp Time Earned	H		CERN	Y
CTEAD	Comp Time Earn Adjustment	H		CERN	Y
CTEH	Comp Time - Time and a Half	H		CERN	Y
CTPO	Comp Time Payout	H	CTO	CTKN	Y
CTT	Comp-Time Taken	H	CTP	CTKN	Y
DCTFY	Deceased Comp Time Follow Yr	H	TCP	CTKN	N
DTHCP	Deceased Comp Time	H	DCP	CTKN	Y
FLCT	FMLA Charged to Comp Time	H	FMC	CTKN	Y

<u>Time Reporting Codes for the COMCORE Comp Time Plan</u>
The TRCs are the same as the COMPREG plan but end with a 1.

<u>Time Reporting Codes for the COMPREG Comp Time Plan</u>
The TRCs are the same as the COMPREG plan but end with a 2.

<u>Time Reporting Codes for the COOLOFF Comp Time Plan</u>

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
ADLAD	Admin Lv Cool Off Adjustment	H		CERN	Y
ADLCO	Salary Admin Cool Off	H	ADL	CERN	Y
COCNV	Cooloff for Conversion	H		CERN	Y

Time Reporting Codes for the ENFORCED Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
ENCNV	Enforced for Conversion	H		CERN	Y
ENFAD	Enforced Leave Adjustment	H		CERN	Y
ENFLV	Enforced Leave	H	ENF	CERN	N

Time Reporting Codes for the HOLIDAY Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
DHLFY	Deceased Holiday Pay Follow Yr	H	THL	CTKN	N
DTHHL	Deceased Holiday Pay	H	DHL	CTKN	Y
FMHL	FMLA Charged Holiday Pay	H	FMH	CTKN	Y
HLCNV	Holiday for Conversion	H		CERN	Y
HOLAD	Holiday Leave Adjustment	H		CERN	Y
HOLPO	Holiday Payout	H	HPD	CTKN	Y
HOLT	Holiday - Salary	H	HOL	CTKN	Y
HOLWK	Holiday Worked	H		CERN	N

Time Reporting Codes for the MILITARY Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
MILAD	Military Leave Adjustment	H		CERN	Y
MILLV	Military Leave Salary	H	MLS	CERN	Y
MLCNV	Military for Conversion	H		CERN	Y

Time Reporting Codes for the ORG Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
OGCNV	Org Leave for Conversion	H		CERN	Y
ORGAD	Organizational Leave Adjustmen	H		CERN	Y
ORGLV	Organizational Leave Salary	H	OLS	CERN	Y

Time Reporting Codes for the SHARED Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
FMSH	FMLA Charged Shared Leave	H	FMR	CTKN	Y
S1CNV	Shared Lv for Conversion	H		CERN	Y
SHLAD	Shared Leave Adjustment	H		CERN	Y
SHLGV	Shared Leave Given Back	H		CTKN	Y
SHLVT	Shared Leave Taken	H	LVS	CTKN	Y
SHREC	Shared Leave Rec	H		CERN	N
WCSHR	Workers Comp - Shared Leave	H	WCH	CTKN	Y

Time Reporting Codes for the SHLFNOTRERM Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
S2CNV	Shared Non Term for Conversion	H		CERN	Y
SHLNA	Shared Leave Non-Term Adjust	H		CERN	Y
SHLNT	Shared Leave Non-Terminal	H		CERN	Y

Time Reporting Codes for the SHLFTERM Comp Time Plan

TRC	Descr	TRC Type	Earn Code	Comp Leave Ind	Add to Gross
S3CNV	Shared Lv Term for Conversion	H		CERN	Y
SHLTA	Shared Leave - Term ILL Adjust	H		CERN	Y
SHLTR	Shared Leave - Terminally Ill	H		CERN	Y

Our employee ***earned*** comp time in October and ***took*** some comp time in October.

Our employee **earned comp time** as follows:

October 4 - 3 hours
October 6 - 2 hours
October 8 - 8 hours
October 12 - 2 hours
October 15 - 8 hours
October 20 - 1 hour

Total of 24 hours

Our employee ***took comp time*** as follows:

October 7 - 5 hours
October 17 – 6 hours

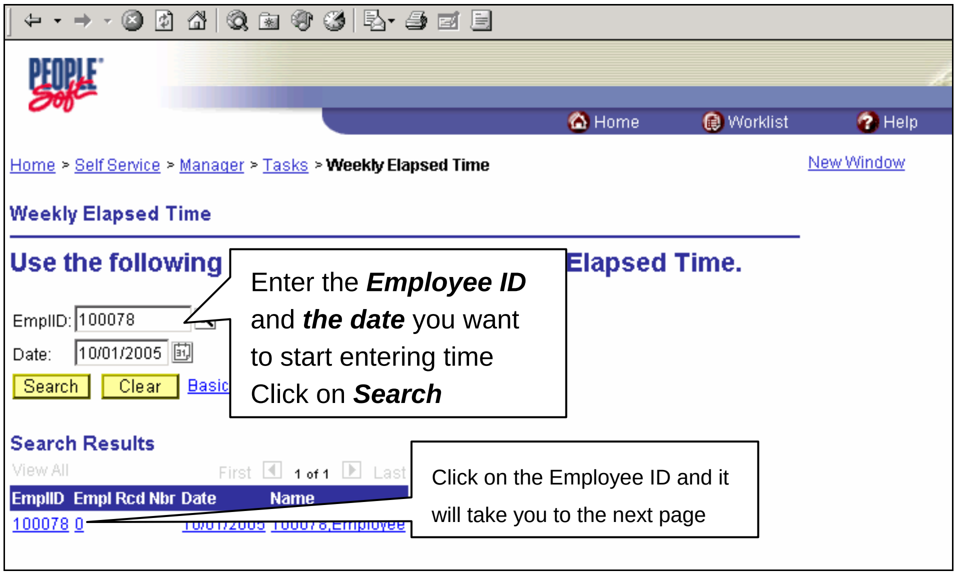
Total of 11 hours

Peoplesoft requires a comp time balance before any comp time can be taken.

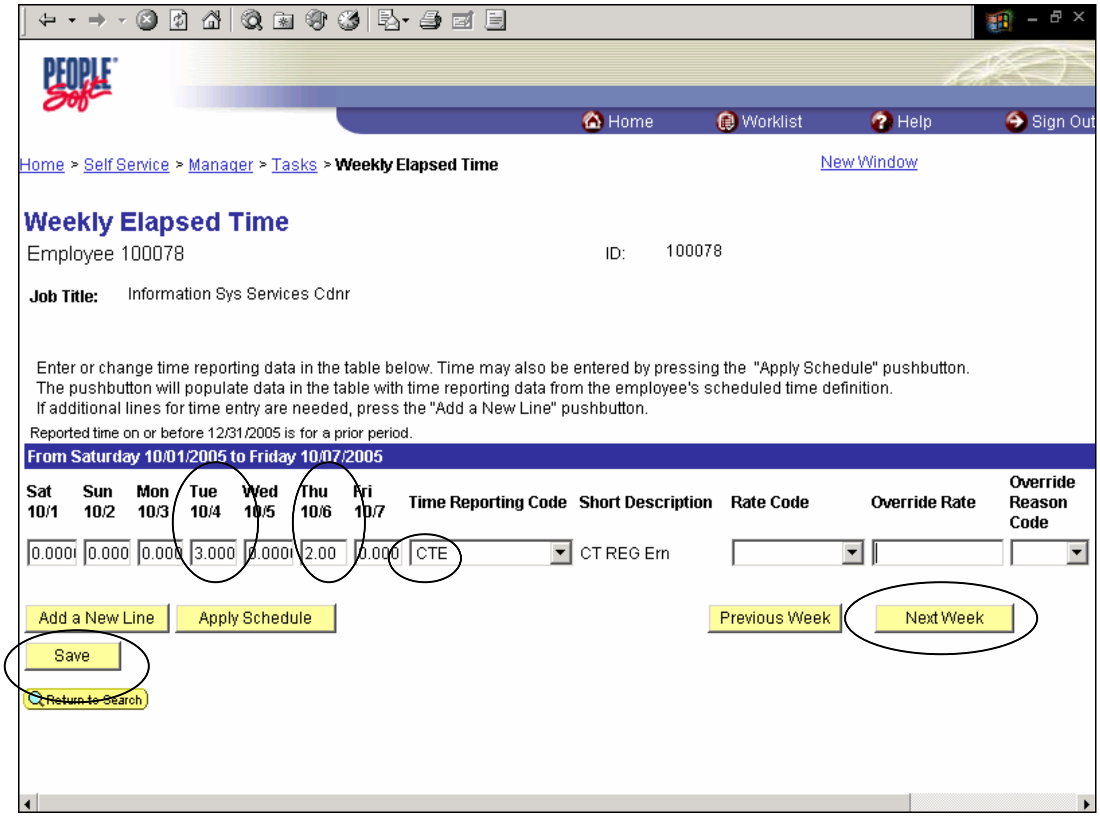
The Comp Time Earned hours must be entered ***first via the Weekly Elapsed Time Page*** *and* ***processed through Time Administration*** *to record the* ***Comp Time Earned Balance****.*

WEEKLY ELAPSED TIME ENTRY

Self Service > Manager > Tasks > Weekly Elapsed Time



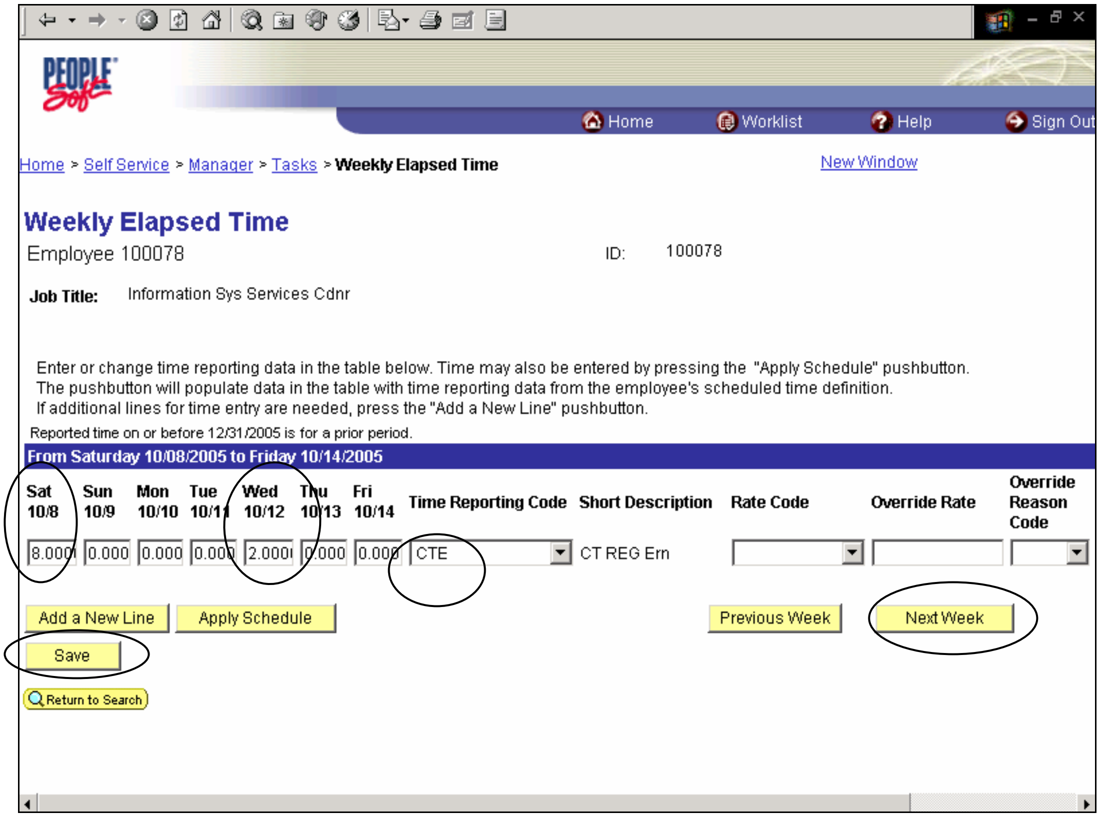
Key the time for October 4th into the Tuesday field.
Key the time for October 6th into the Thursday field.
Select the Time Reporting Code of CTE from the drop down list.



Click ***SAVE.***

Click on the ***Next Week yellow button*** to continue entering time for the next week.

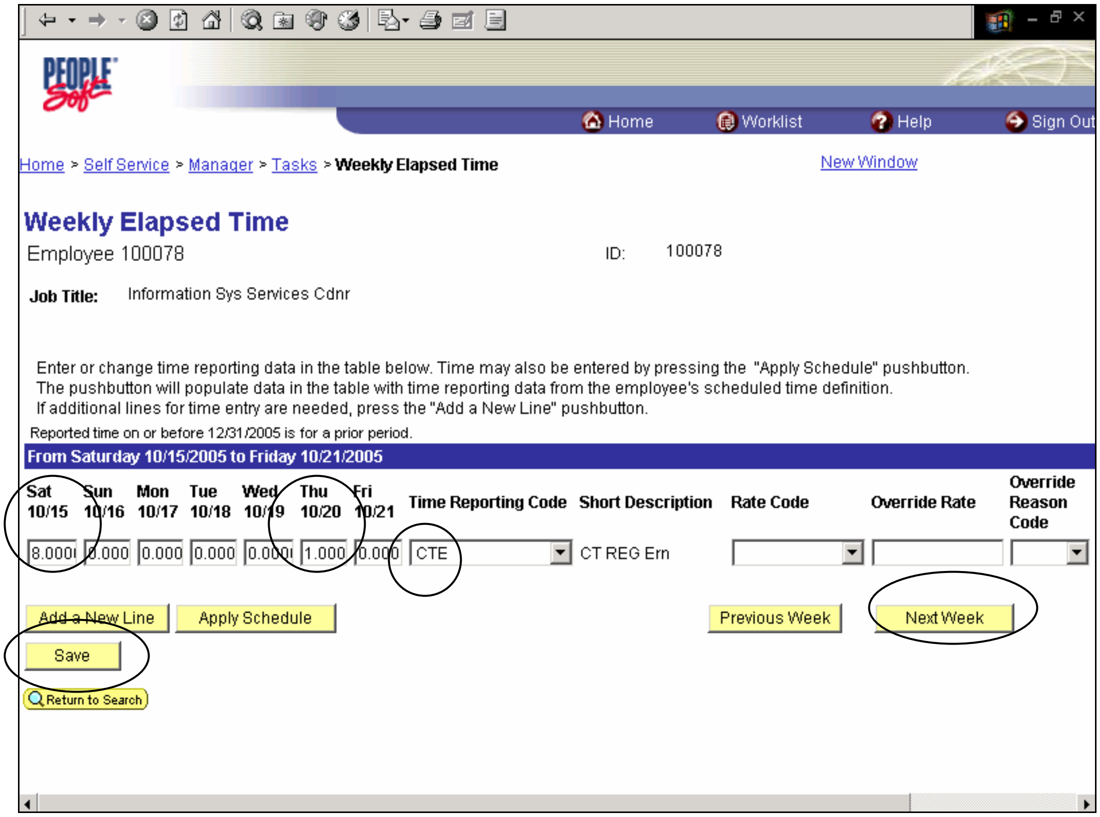
Key the time for October 8th into the Saturday field.
Key the time for October 12^{h} into the Wednesday field.
Select the Time Reporting Code of ***CTE*** from the drop down list.



Click ***SAVE.***

Click on the ***Next Week yellow button*** to continue entering time for the next week.

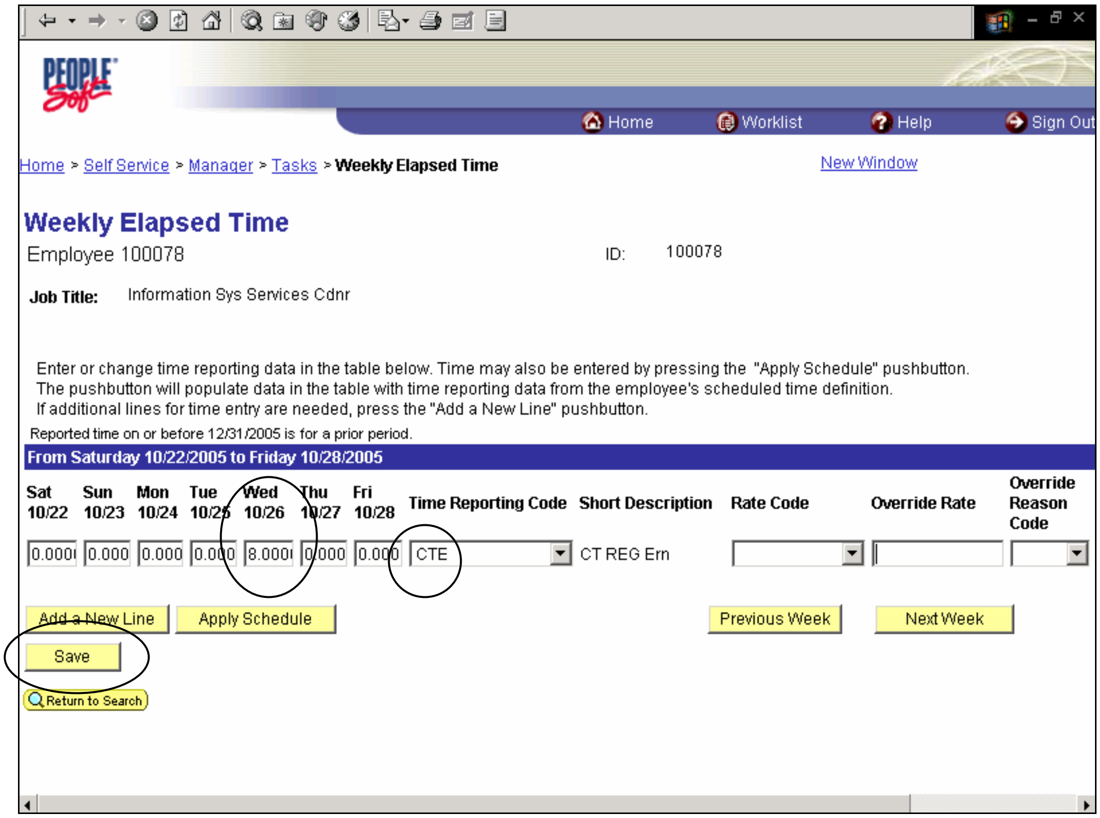
Key the time for October 15th into the Saturday field.
Key the time for October 20th into the Thursday field.
Select the Time Reporting Code of ***CTE*** from the drop down list.



Click ***SAVE.***

Click on the ***Next Week yellow button*** to continue entering time for the next week.

Key the time for October 26th into the Wednesday field.
Select the Time Reporting Code of ***CTE*** from the drop down list.

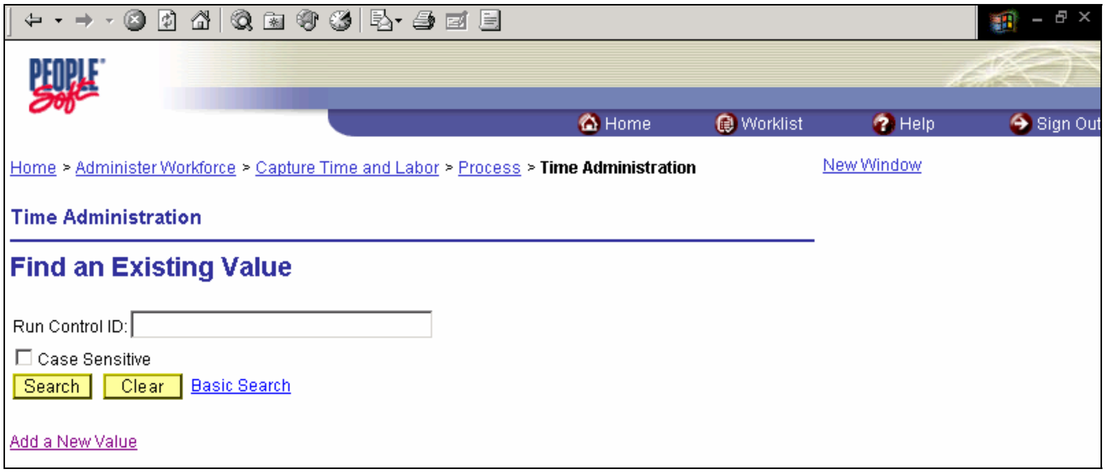


Click ***SAVE.***

The next step is to run the Time Administration Process.

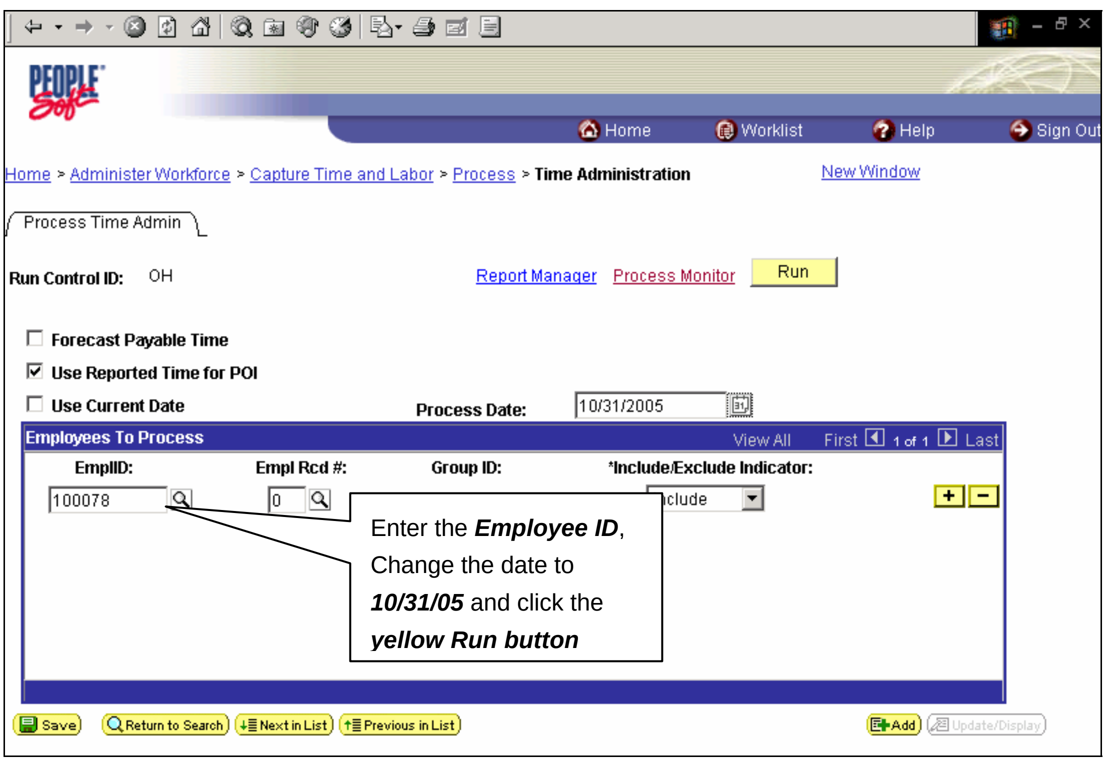
RUNNING TIME ADMINISTRATION

Administer Workforce > Capture Time and Labor > Process > Time Administration



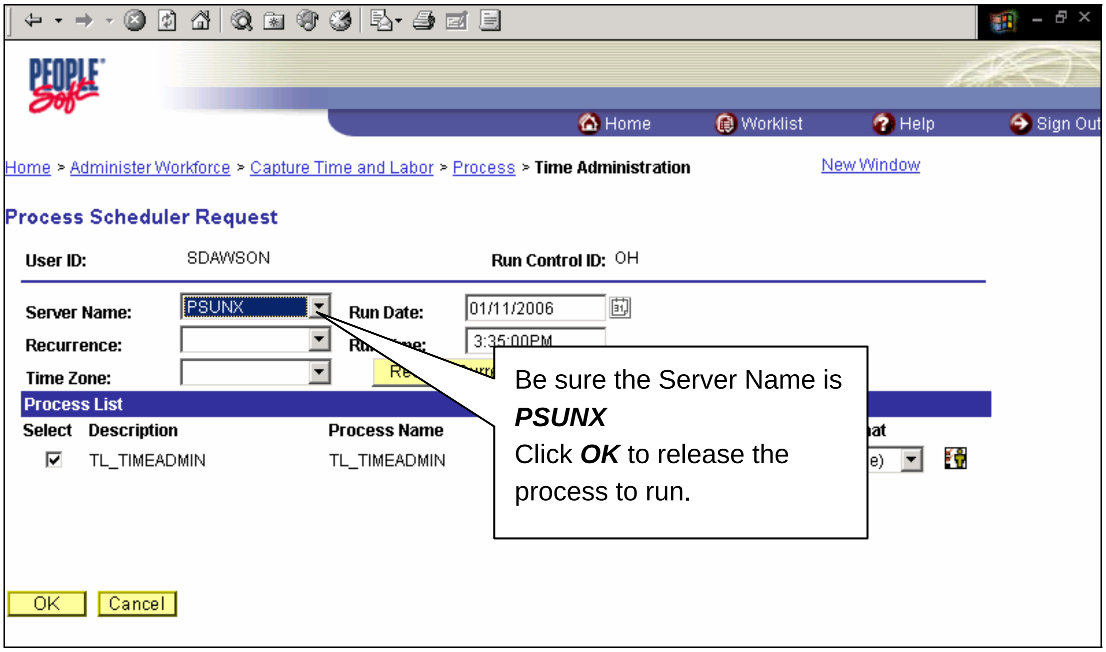
*Select an existing **Run Control ID** or **Add a New Value***

Complete the Process Time Admin Run Control.

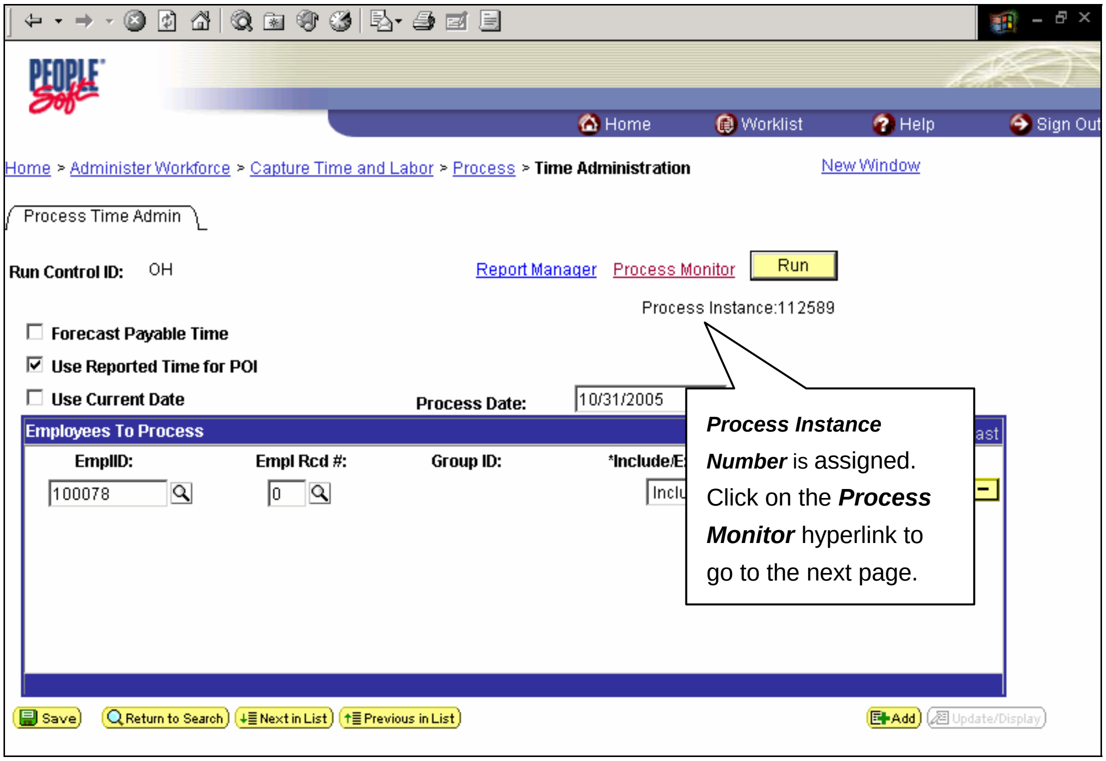


It will take you to the next screen – ***Process Scheduler Request***

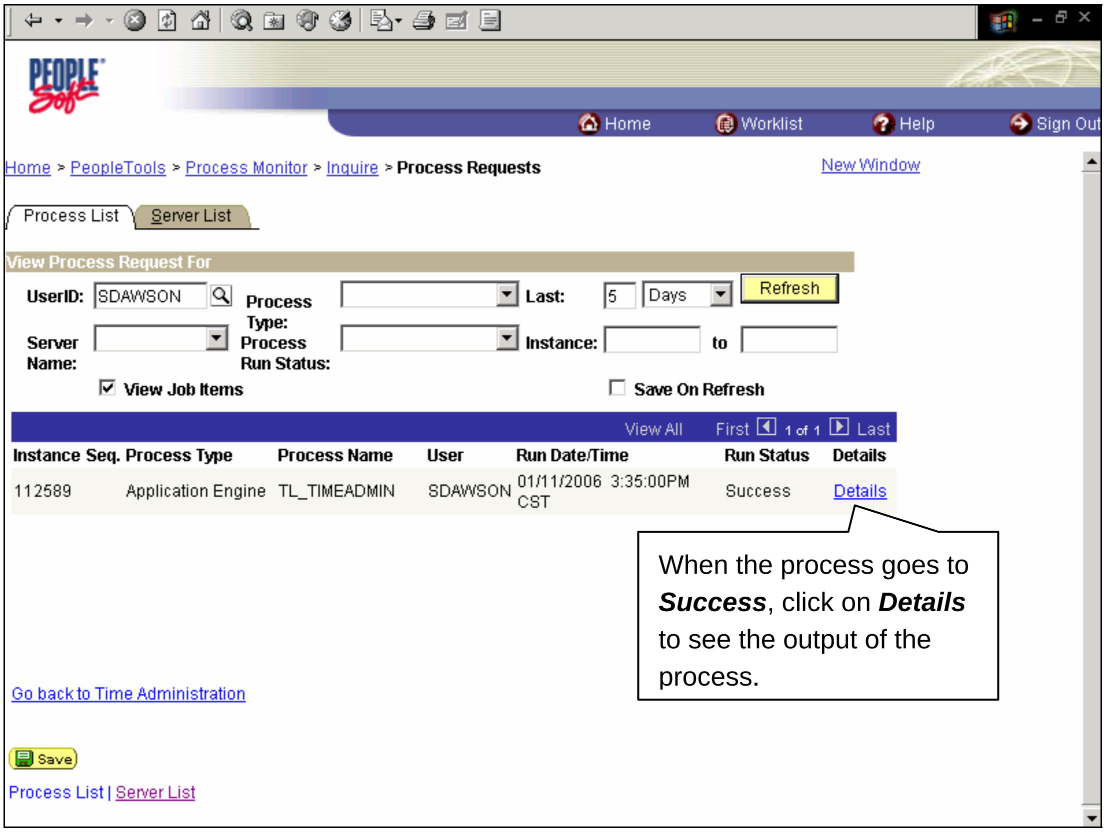
Process Scheduler Request

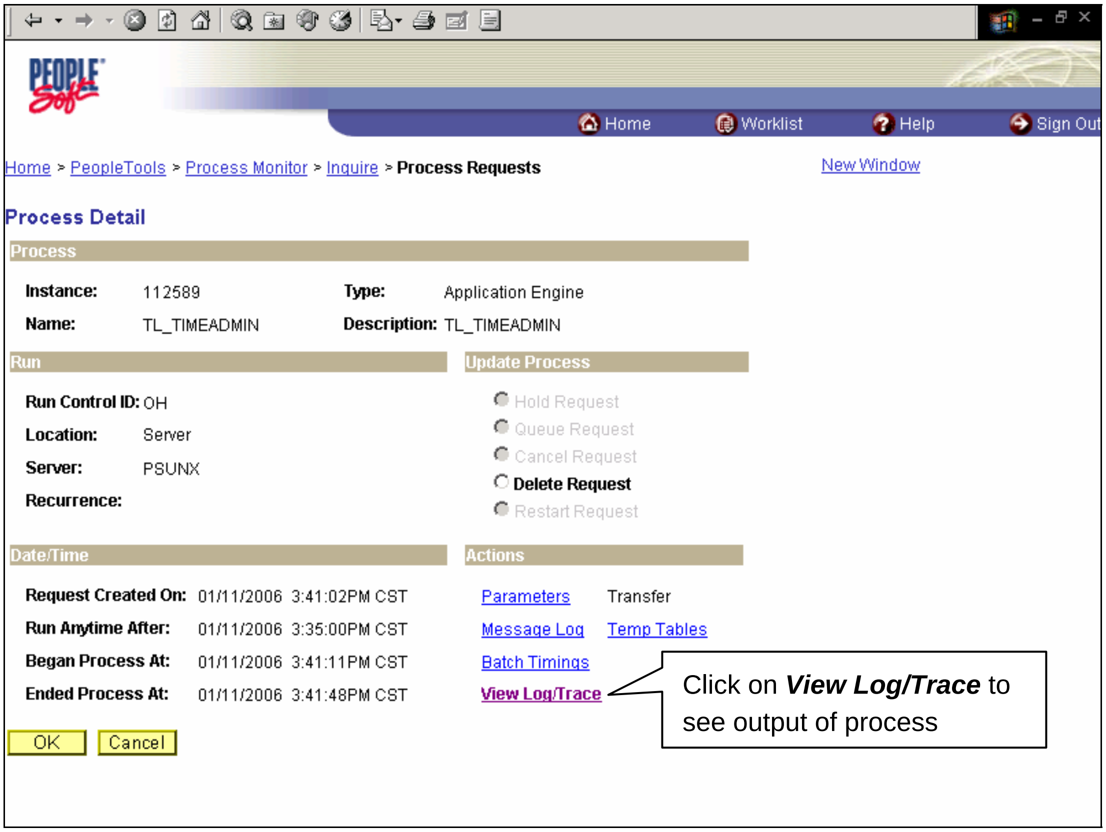


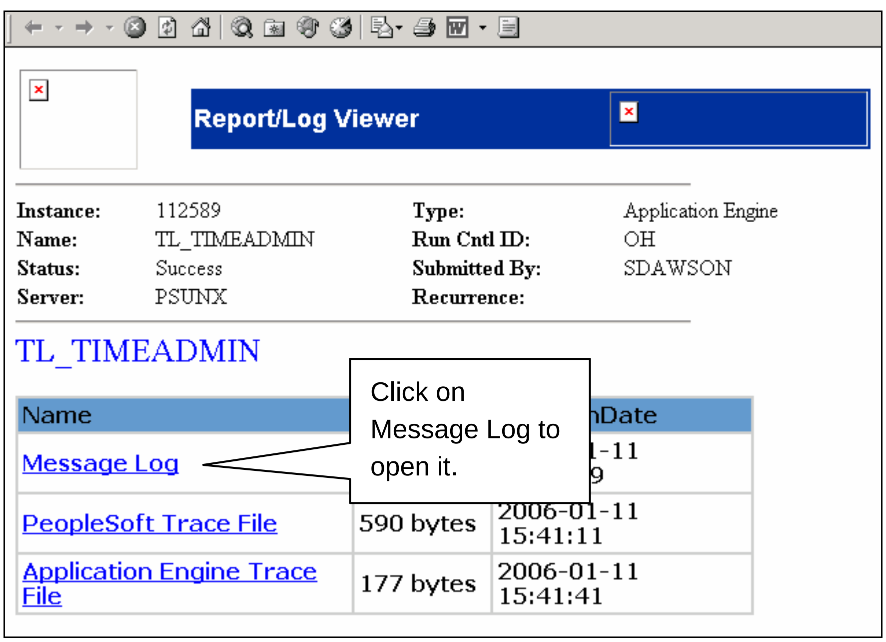
A *Process Instance Number* is assigned when the process is submitted.



Run the Time Administration Process to Success


Home
Worklist
Help
Sign Out
Home > PeopleTools > Process Monitor > Inquire > Process Requests
New Window
Process List
Server List
View Process Request For
UserID: SDAWSON
Process Type:
Last: 5 Days
Refresh
Server Name:
Process Run Status:
Instance: to
View Job Items
Save On Refresh
View All First 1 of 1 Last
Instance Seq. Process Type Process Name User Run Date/Time Run Status Details
112589 Application Engine TL_TIMEADMIN SDAWSON 01/11/2006 3:35:00PM CST Success Details
When the process goes to ***Success***, click on ***Details*** to see the output of the process.
Go back to Time Administration
Save
Process List | Server List


Home
Worklist
Help
Sign Out
Home > PeopleTools > Process Monitor > Inquire > Process Requests
New Window
Process Detail
Process
Instance: 112589
Type: Application Engine
Name: TL_TIMEADMIN
Description: TL_TIMEADMIN
Run
Run Control ID: OH
Location: Server
Server: PSUNX
Recurrence:
Update Process
Hold Request
Queue Request
Cancel Request
Delete Request
Restart Request
Date/Time
Request Created On: 01/11/2006 3:41:02PM CST
Run Anytime After: 01/11/2006 3:35:00PM CST
Began Process At: 01/11/2006 3:41:11PM CST
Ended Process At: 01/11/2006 3:41:48PM CST
Actions
Parameters
Transfer
Message Log
Temp Tables
Batch Timings
View Log/Trace
OK
Cancel
Click on ***View Log/Trace*** to see output of process


Report/Log Viewer
Instance: 112589
Type: Application Engine
Name: TL_TIMEADMIN
Run Cntl ID: OH
Status: Success
Submitted By: SDAWSON
Server: PSUNX
Recurrence:
TL_TIMEADMIN
Name
Date
Message Log
PeopleSoft Trace File
590 bytes
2006-01-11 15:41:11
Application Engine Trace File
177 bytes
2006-01-11 15:41:41
Click on Message Log to open it.

Message Log

```
PeopleTools 8.19.09 - Application Engine
Copyright (c) 1988-2006 PeopleSoft, Inc.
All Rights Reserved


2006-01-11-15.41.30.000000 -- Starting TL_TIMEADMIN (13507,13)

2006-01-11-15.41.33.000000 -- Starting TL_TA000200 (13507,13)

2006-01-11-15.41.34.000000 -- Starting TL_TA000300 (13507,13)

2006-01-11-15.41.35.000000 -- Starting TL_TA000400 (13507,13)

2006-01-11-15.41.36.000000 -- Starting TL_TA000410 (13507,13)

2006-01-11-15.41.36.000000 -- Starting TL_TA000420 (13507,13)

2006-01-11-15.41.37.000000 -- Starting TL_TA000500 (13507,13)

2006-01-11-15.41.39.000000 -- Starting TL_SCHRES_AE (13507,13)

2006-01-11-15.41.40.000000 -- Starting TL_TA000700 (13507,13)
15.41.41 UpdateStats ignored - COMMIT required\n

2006-01-11-15.41.41.000000 -- Starting TL_TA000800 (13507,13)

2006-01-11-15.41.42.000000 -- Starting TL_TA000900 (13507,13)

2006-01-11-15.41.47.000000 -- Starting TL_TA001000 (13507,13)

2006-01-11-15.41.48.000000 -- Starting TL_TA001100 (13507,13)

2006-01-11-15.41.48.000000 -- Starting TL_TA001200 (13507,13)

2006-01-11-15.41.48.000000 -- Starting TL_TA001300 (13507,13)

========>                  100% of the job completed. (13507,
Application Engine program TL_TIMEADMIN ended normally
```

Be sure that this line is blank

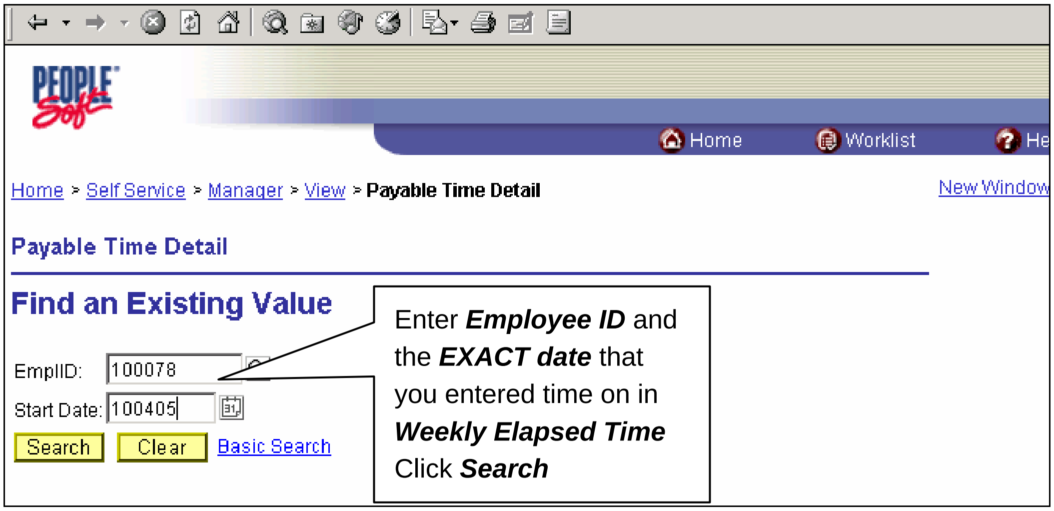
Everything looks good here so we get out of the Message Log and go to check Payable Time.

If you get 'No employees available for processing' on the 3rd line from the bottom – that means what weekly elapsed time was not processed for anybody in the Time Administration Run. Nothing happened.

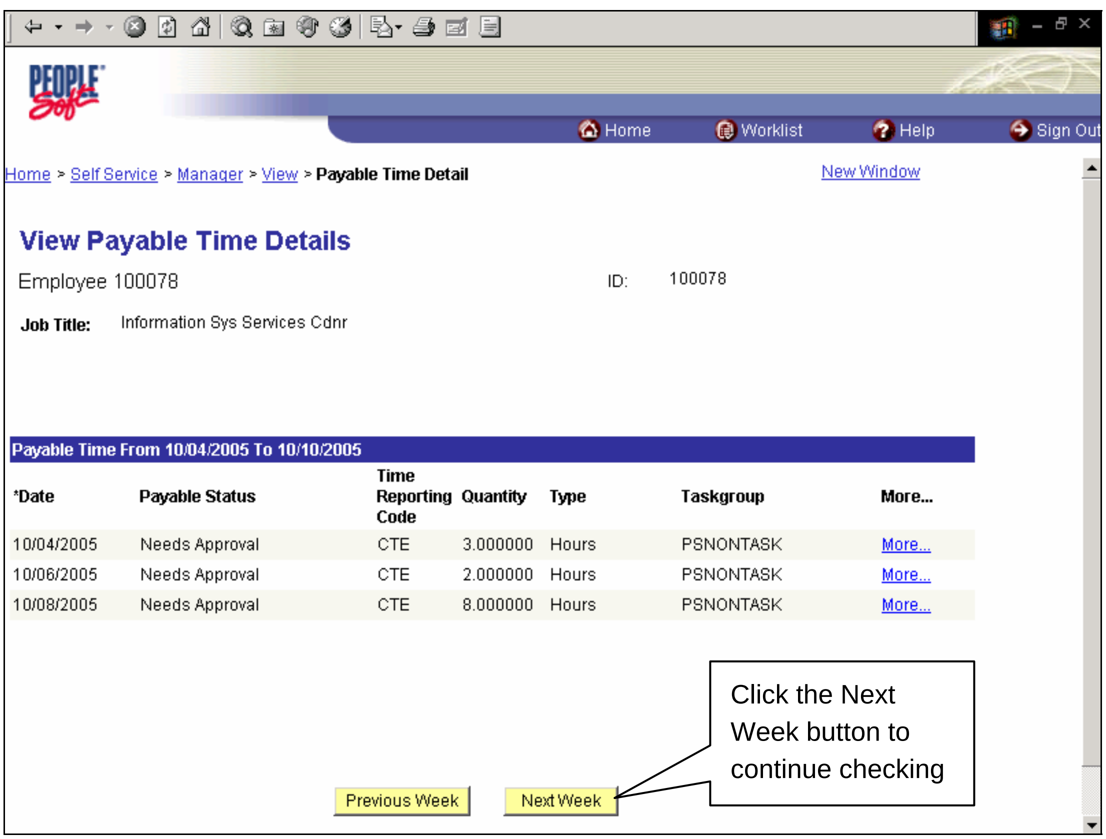
Go back and check the process date on the Time Admin run control.

CHECK FOR PAYABLE TIME

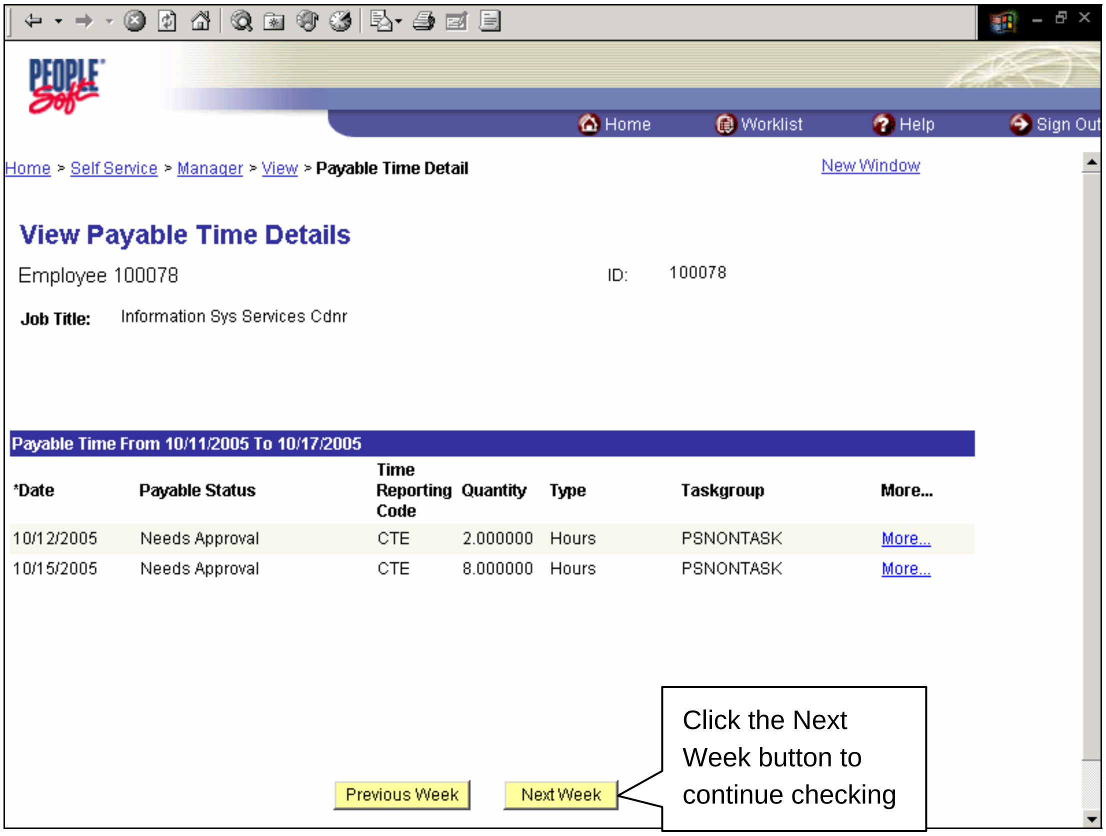
Self Service > Manager > View > Payable Time Detail



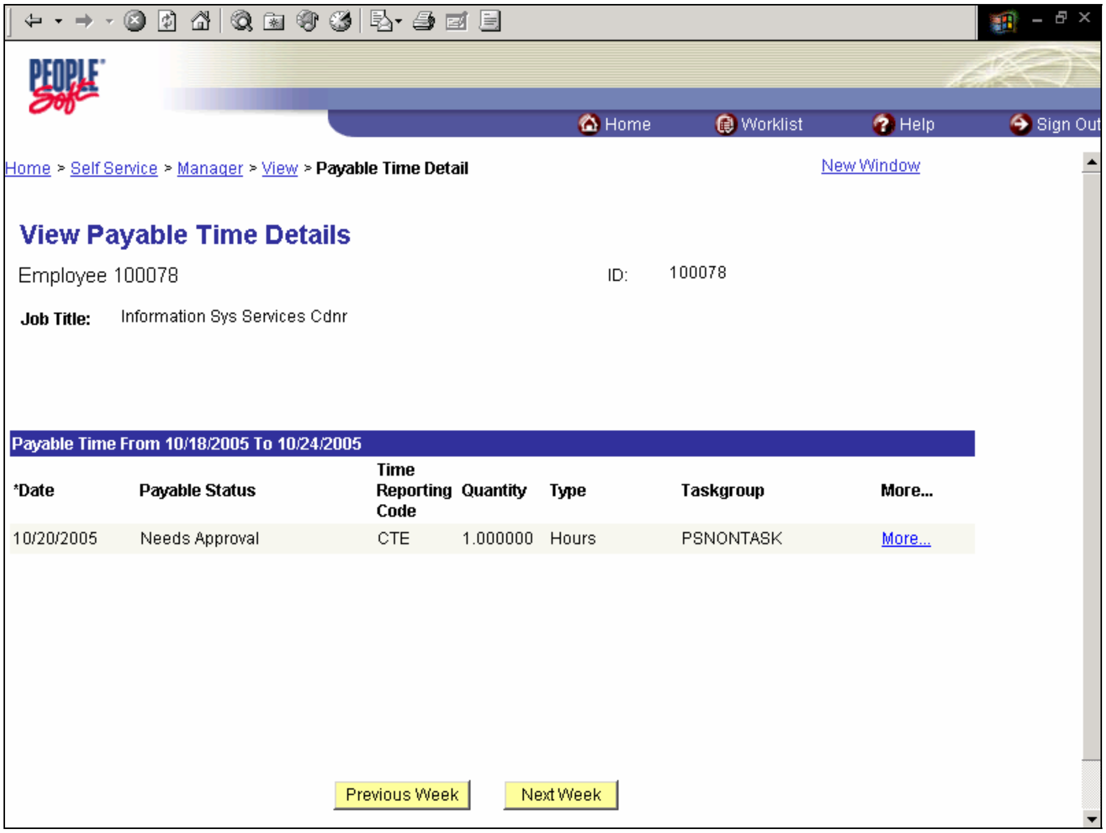
There should be one line of payable time for every line of Weekly Elapsed Time entered.



Self Service > Manager > View > Payable Time Detail



Self Service > Manager > View > Payable Time Detail

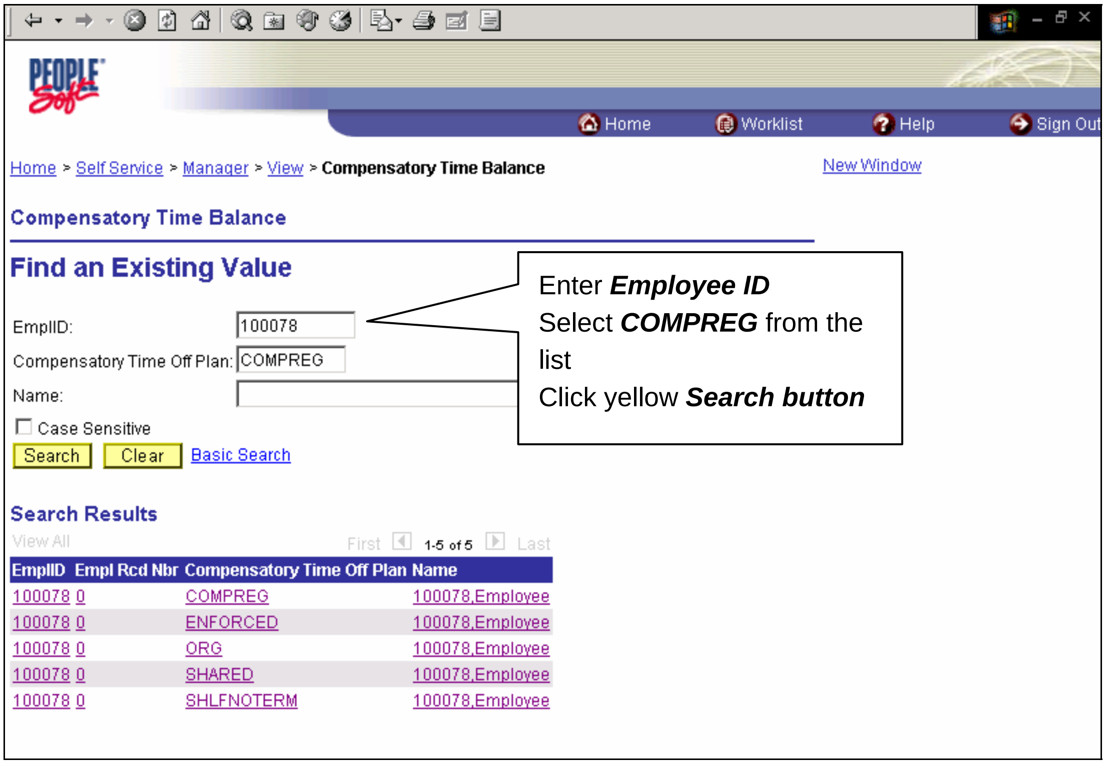


Everything looks good. All the Comp Time Earned has posted.

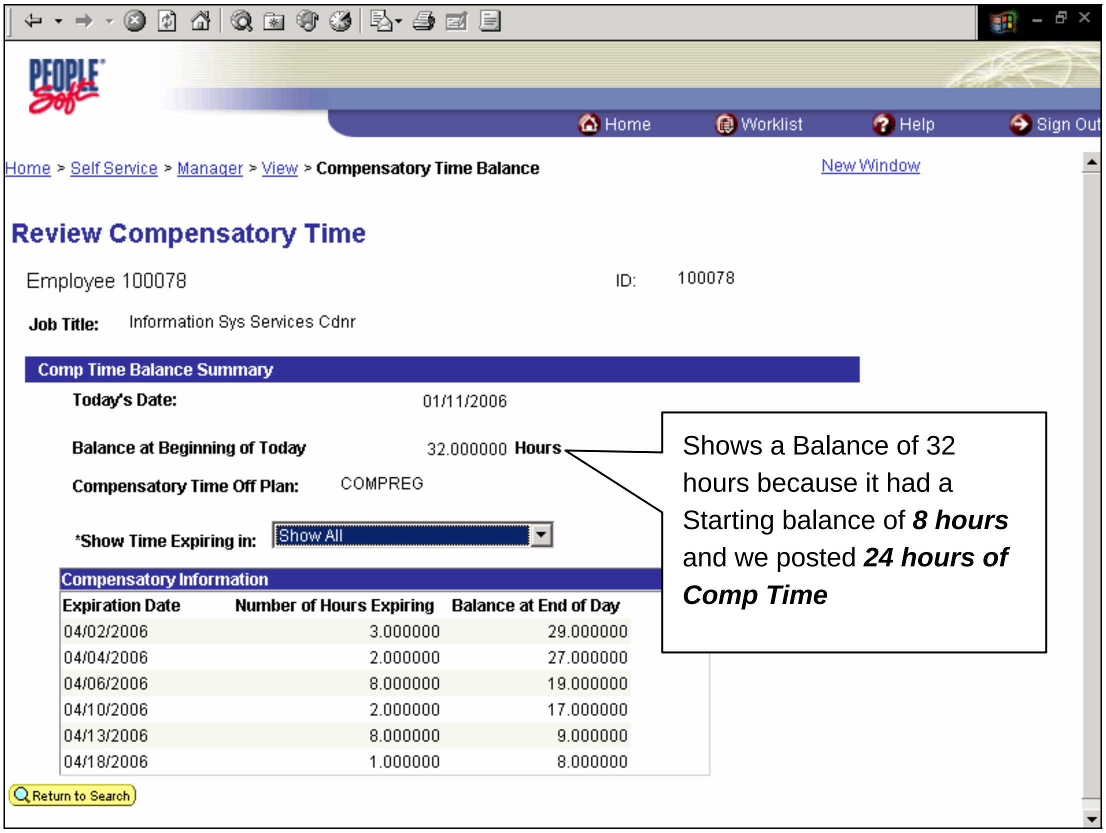
Now – let's go look at the Comp Time Balance for COMPREG.

VIEWING COMPENSATORY TIME BALANCES

Self Service > Manager > View > Compensatory Time Balance –



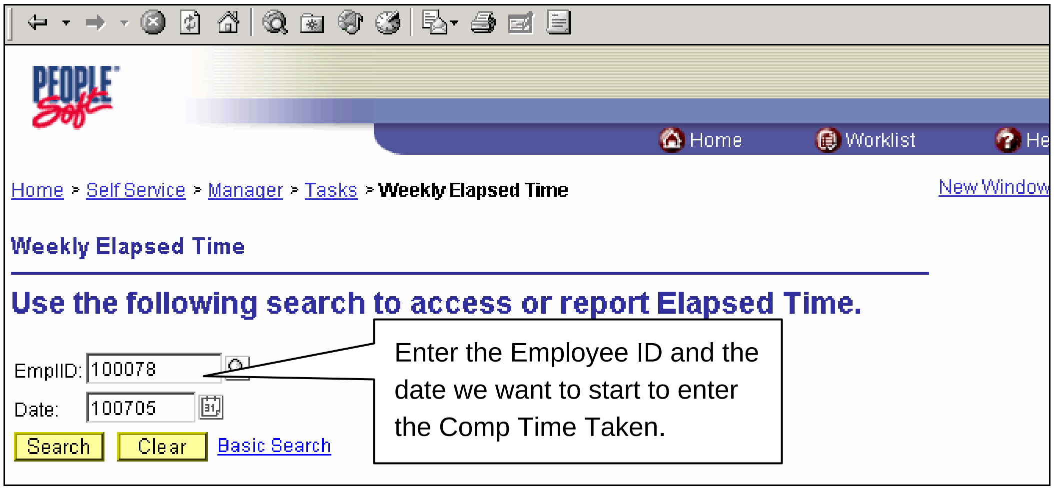
Self Service > Manager > View > Compensatory Time Balance



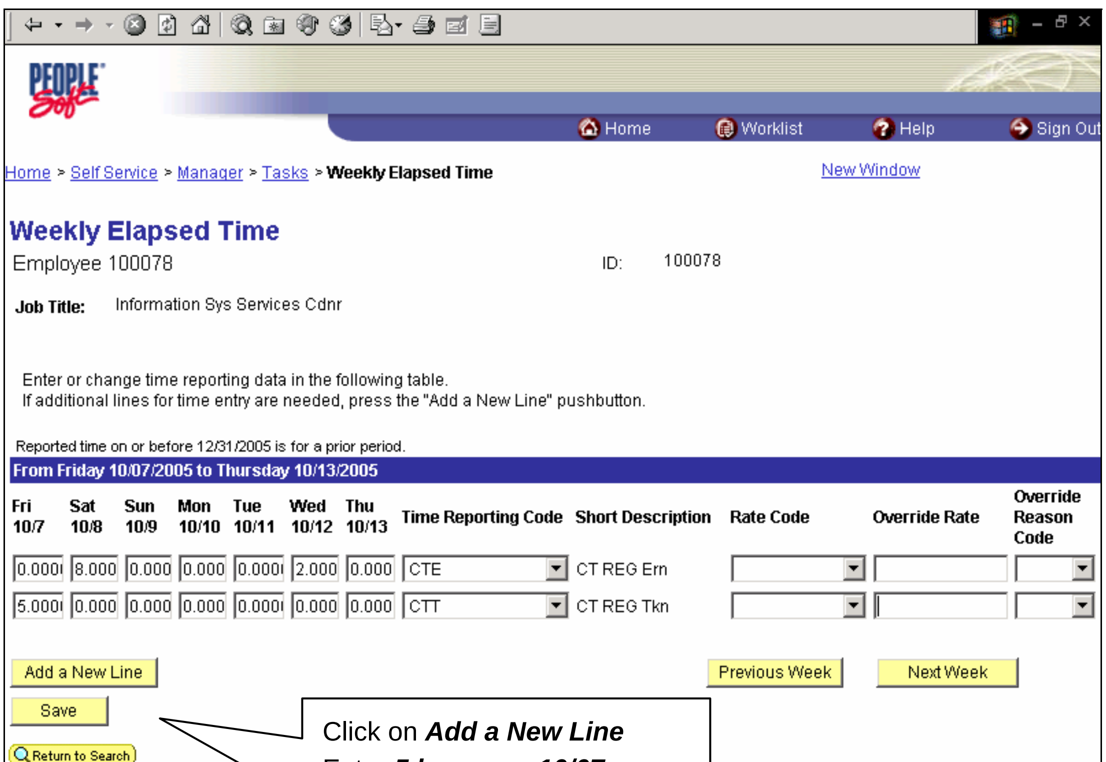
Now – we are ready to enter the Comp Time Taken for our employee.

Go to Weekly Elapsed Time

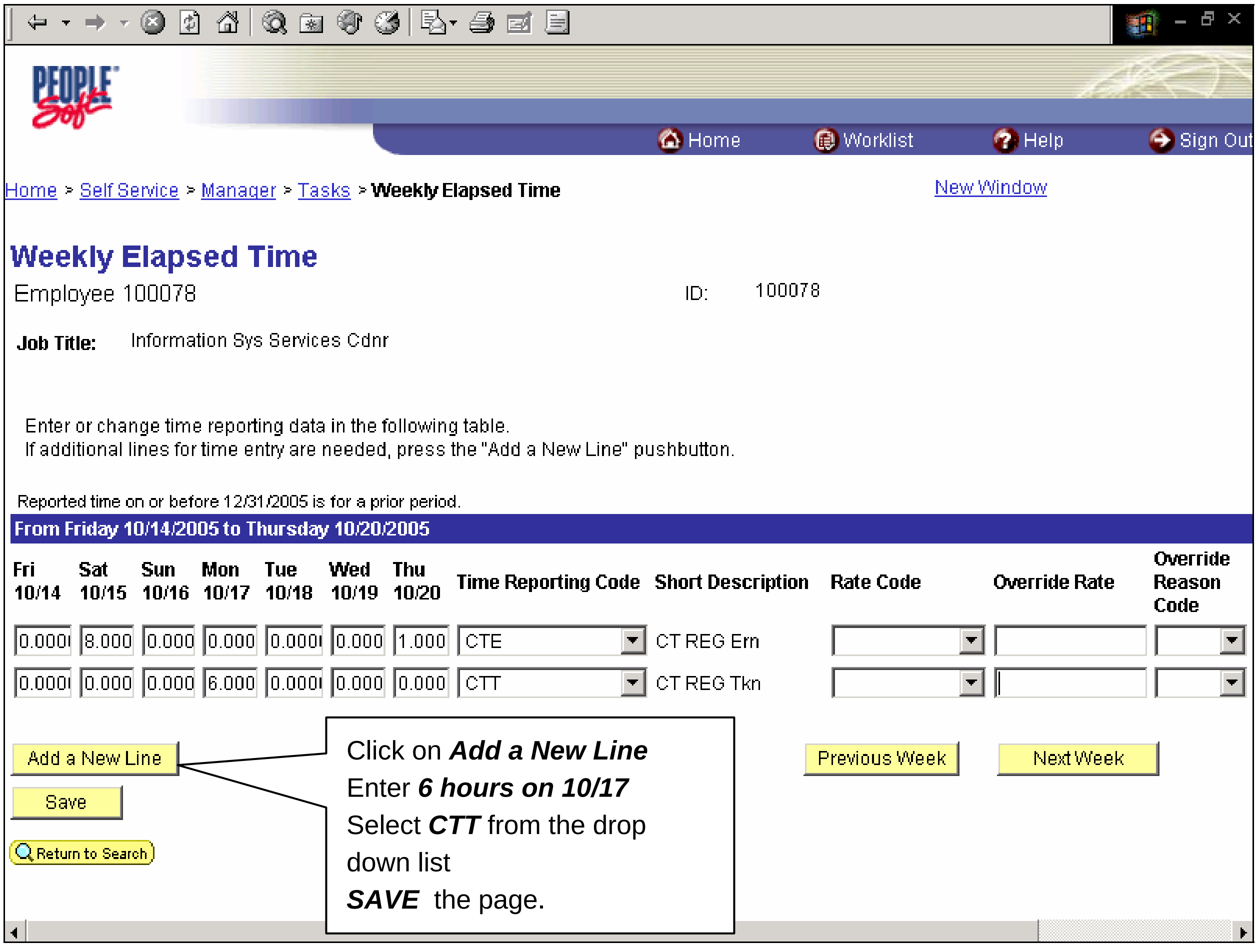
Self Service > Manager > Tasks > Weekly Elapsed Time



Enter the Employee ID and the date we want to start to enter the Comp Time Taken.



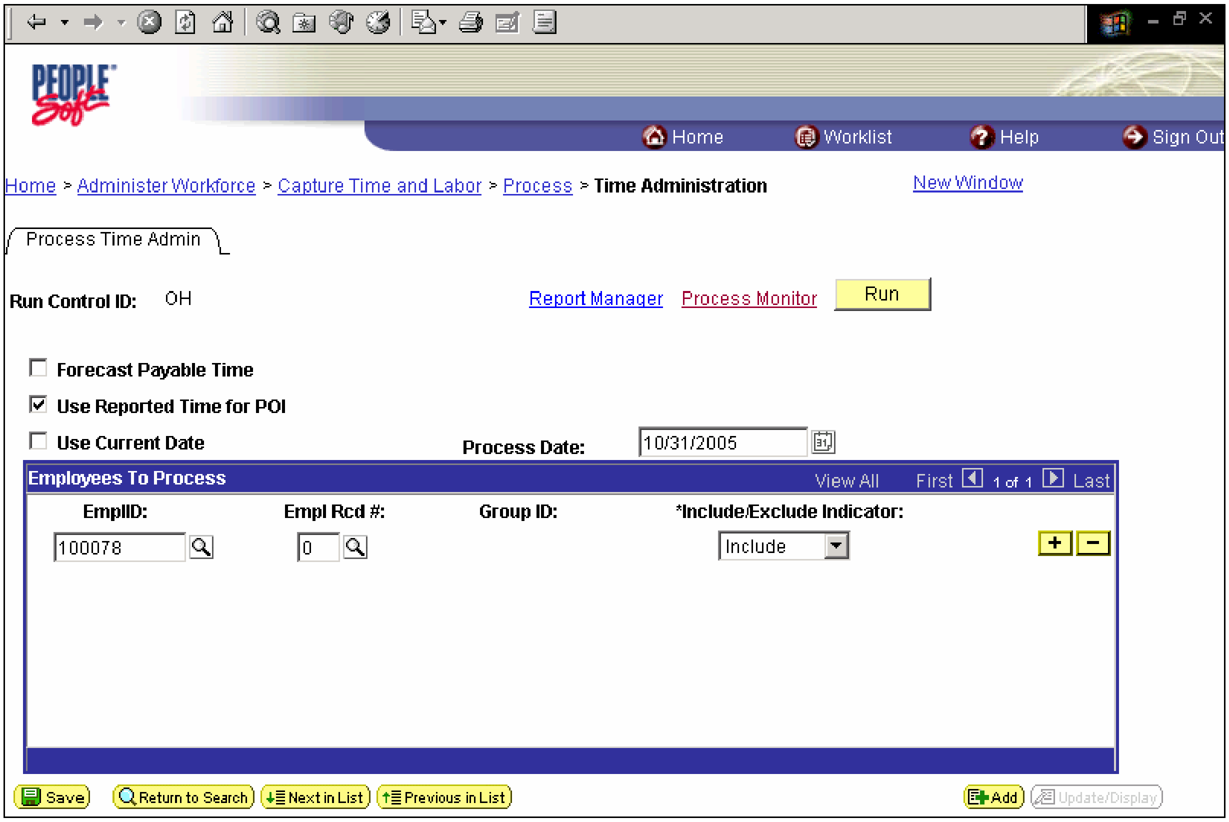
Click on ***Add a New Line***
Enter ***5 hours on 10/07***
Select ***CTT*** from the TRC drop down list
Click on ***SAVE***
Click on ***Next Week***



The next step is to Run Time Administration again.

Administer Workforce > Capture Time and Labor > Process > Time Administration

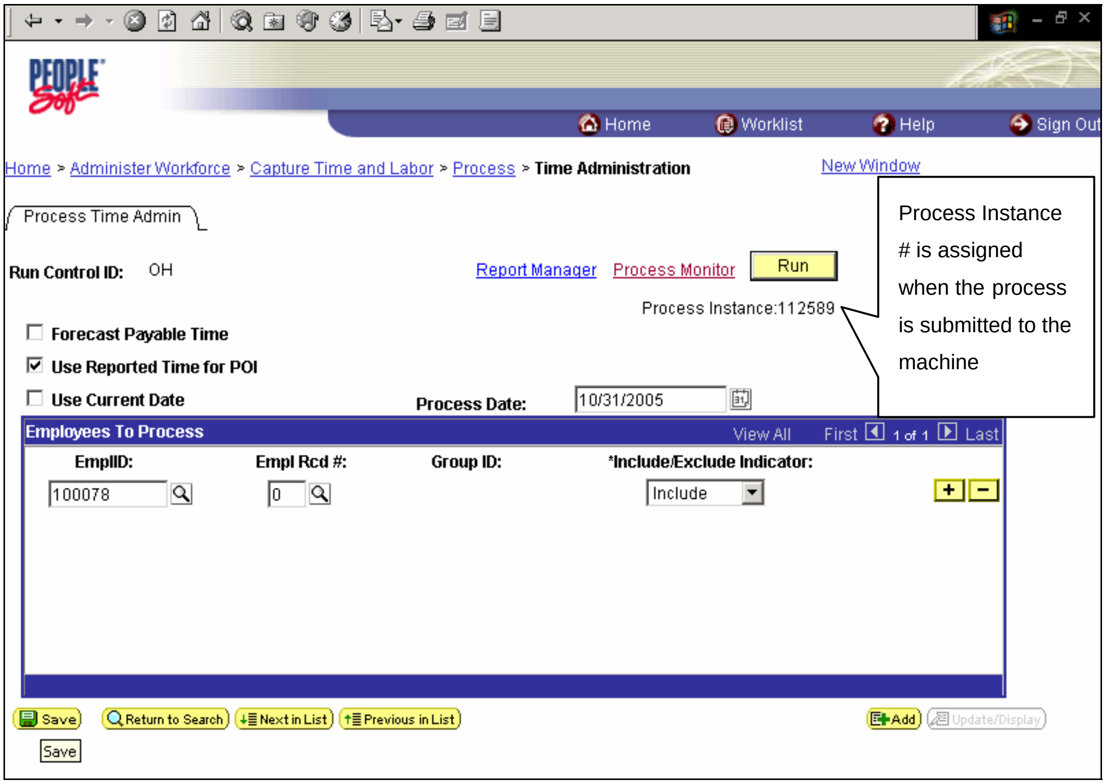
Complete the Run Control for Time Admin.



We don't need to make any changes to this run control. We are still processing employee ID 100078 for the month of October.

Submit this process to Process Scheduler and run it – just like we did for the Comp Time Earned Time.

Administer Workforce > Capture Time and Labor > Process > Time Administration

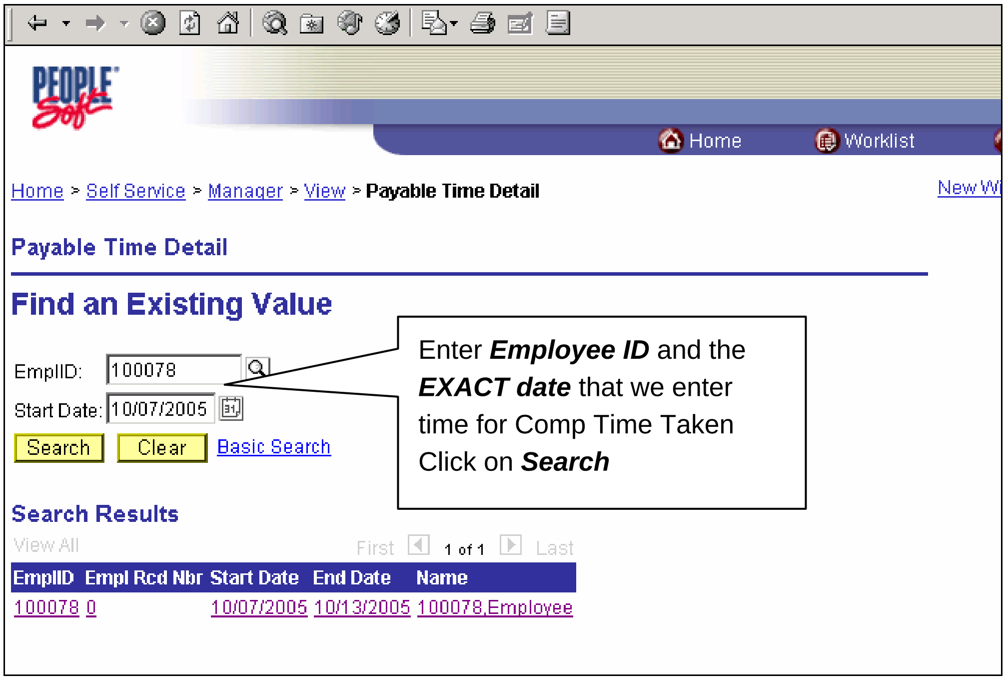


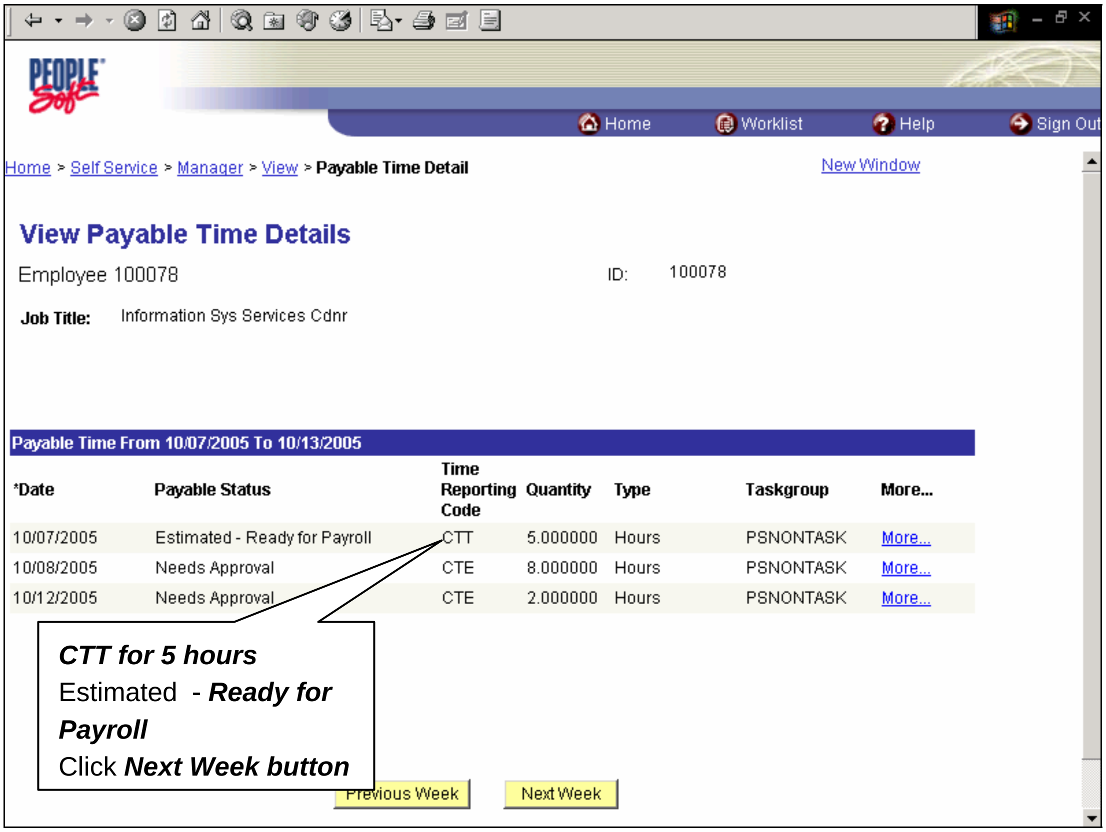
When the process runs to 'Success', click on blue hyperlink ***Details*** and ***View Log/Trace*** to get to the ***Message Log.***

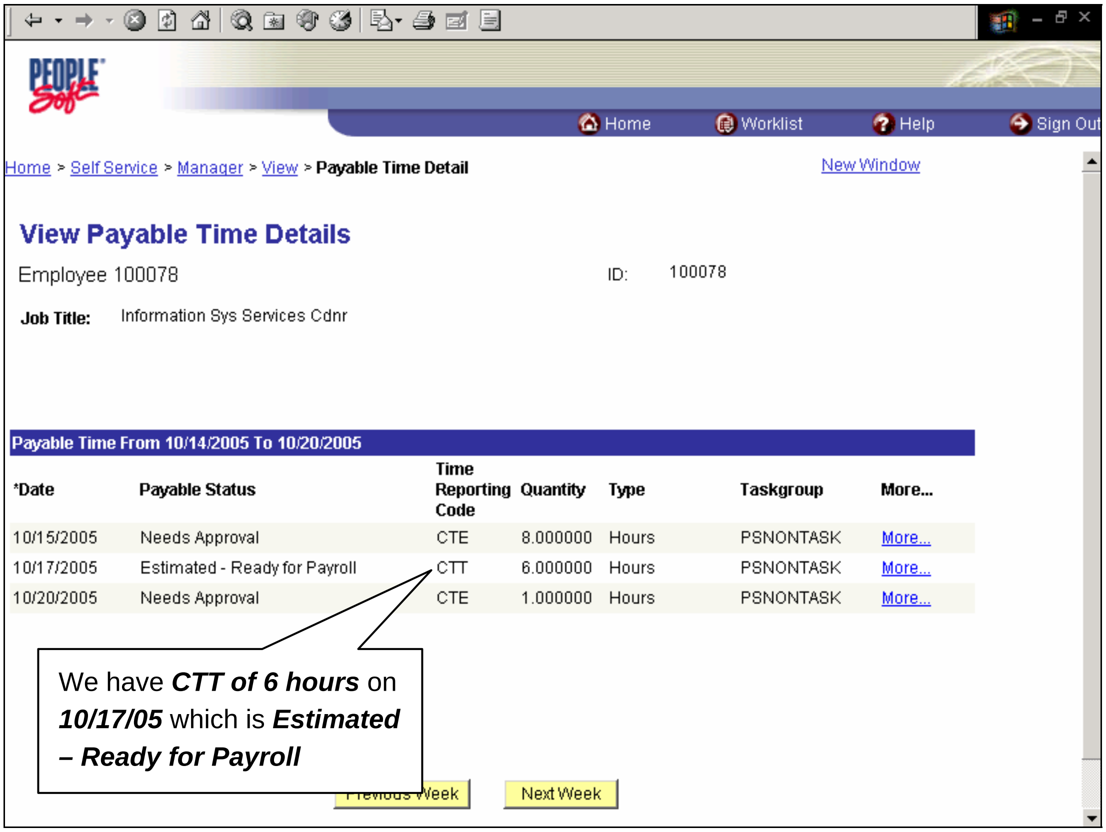
Check the Message Log to be sure that we processed the time.

Go check for Payable Time.

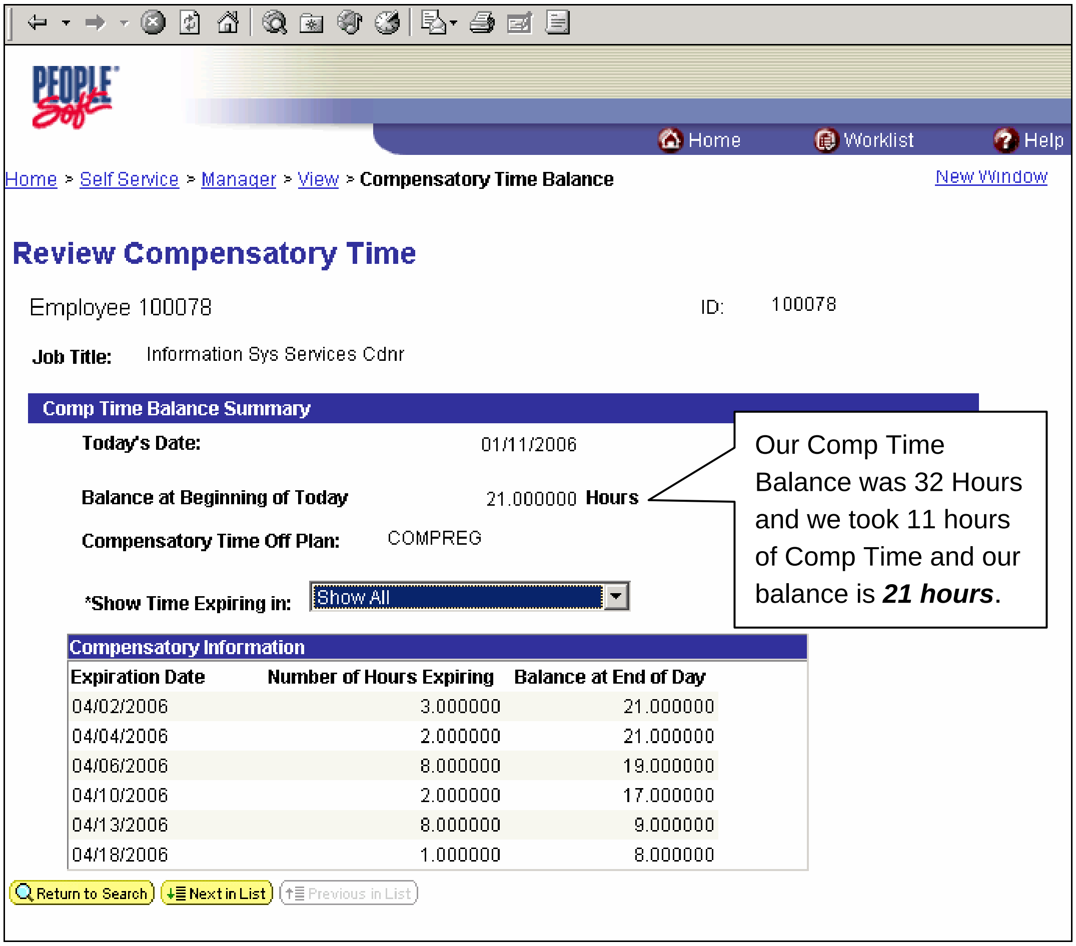
Self Service > Manager > View > Payable Time Detail




Home
Worklist
Help
Sign Out
Home > Self Service > Manager > View > Payable Time Detail
New Window
View Payable Time Details
Employee 100078
ID: 100078
Job Title: Information Sys Services Cdnr
Payable Time From 10/07/2005 To 10/13/2005
*Date | Payable Status | Time Reporting Code | Quantity | Type | Taskgroup | More...
10/07/2005 | Estimated - Ready for Payroll | CTT | 5.000000 | Hours | PSNONTASK | More...
10/08/2005 | Needs Approval | CTE | 8.000000 | Hours | PSNONTASK | More...
10/12/2005 | Needs Approval | CTE | 2.000000 | Hours | PSNONTASK | More...
CTT for 5 hours
Estimated - Ready for Payroll
Click Next Week button
Previous Week
Next Week


Home
Worklist
Help
Sign Out
Home > Self Service > Manager > View > Payable Time Detail
New Window
View Payable Time Details
Employee 100078
ID: 100078
Job Title: Information Sys Services Cdnr
Payable Time From 10/14/2005 To 10/20/2005
*Date | Payable Status | Time Reporting Code | Quantity | Type | Taskgroup | More...
10/15/2005 | Needs Approval | CTE | 8.000000 | Hours | PSNONTASK | More...
10/17/2005 | Estimated - Ready for Payroll | CTT | 6.000000 | Hours | PSNONTASK | More...
10/20/2005 | Needs Approval | CTE | 1.000000 | Hours | PSNONTASK | More...
We have CTT of 6 hours on 10/17/05 which is Estimated – Ready for Payroll
Next Week

Self Service > Manager > View > Compensatory Time Balance


Home | Worklist | Help

Home > Self Service > Manager > View > Compensatory Time Balance   New Window

Review Compensatory Time

Employee 100078   ID: 100078

Job Title: Information Sys Services Cdnr

Comp Time Balance Summary

Today's Date: 01/11/2006

Balance at Beginning of Today 21.000000 **Hours**

Compensatory Time Off Plan: COMPREG

***Show Time Expiring in:** Show All

Our Comp Time Balance was 32 Hours and we took 11 hours of Comp Time and our balance is ***21 hours***.

Compensatory Information

Expiration Date	Number of Hours Expiring	Balance at End of Day
04/02/2006	3.000000	21.000000
04/04/2006	2.000000	21.000000
04/06/2006	8.000000	19.000000
04/10/2006	2.000000	17.000000
04/13/2006	8.000000	9.000000
04/18/2006	1.000000	8.000000

Return to Search | Next in List | Previous in List

PROCESSING SHARED LEAVE – GIVING & RECEIVING

OVERVIEW

The State of Oklahoma allows the giving of accumulated annual leave and accumulated sick leave from one employee to another employee that has a long-term medical emergency that has used all of their own accumulated leave. This giving and receiving is referred to as Shared Leave.

The amount of hours given from one employee to another has to be subtracted from the giving employee's leave balance to reduce it. It also has to be added to the receiving employee's leave balance before that employee has the time available to be taken.

Two special accumulators have been established that will be updated each time that shared leave time is taken. The special accumulators are **SHLFNOTERM** – Shared Life Non Term with a maximum limit of 261 days or 2088 hours and ***SHLFTERM*** – Shared Life Term with a maximum limit of 365 days or 2920 hours.

There are a set of Time Reporting Codes (TRCs) set up to record these transactions.

Annual and Sick Leave TRCS for the GIVING employee are:

TRC	Descr	TRC Type	*Earn Code*	Comp Leave Ind	Add to Gross
GIVAN	Annual Leave Given	Hours	***ANG***	LTKN	N
GIVSK	Sick Hours Given	Hours	***SKG***	LTKN	N

SHARED Leave TRCs to be used by the RECEIVING employee are:

TRC	Descr	TRC Type	*Earn Code*	Comp Leave Ind	Add to Gross
SHLTA	Shared Leave - Term ILL Adjust	Hours		CERN	Y
SHLTR	Shared Leave - Terminally Ill	Hours		CERN	Y
SHLAD	Shared Leave Adjustment	Hours		CERN	Y
SHLGV	Shared Leave Given Back	Hours		CTKN	Y
SHLNA	Shared Leave Non-Term Adjust	Hours		CERN	Y
SHLNT	Shared Leave Non-Terminal	Hours		CERN	Y
SHREC	Shared Leave Rec	Hours		CERN	N
SHLVT	Shared Leave Taken	Hours	***LVS***	CTKN	Y

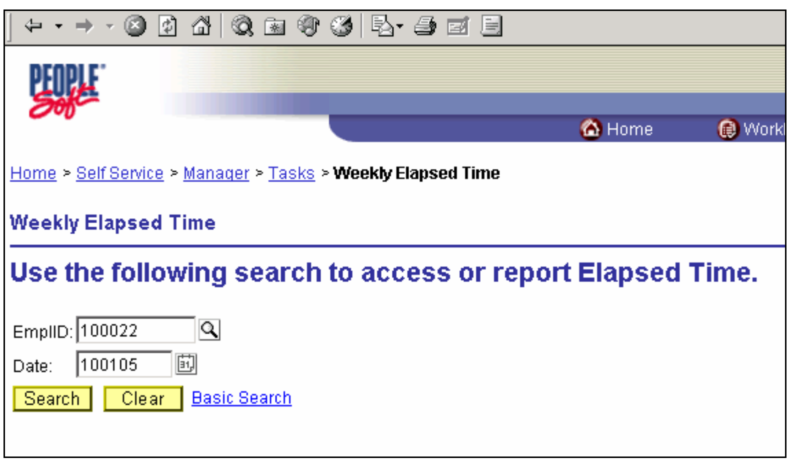
Giving Shared Leave – Employee 100022

The first step is moving the leave from one employee to another employee is updating the appropriate leave balance of the two employees involved. **.**

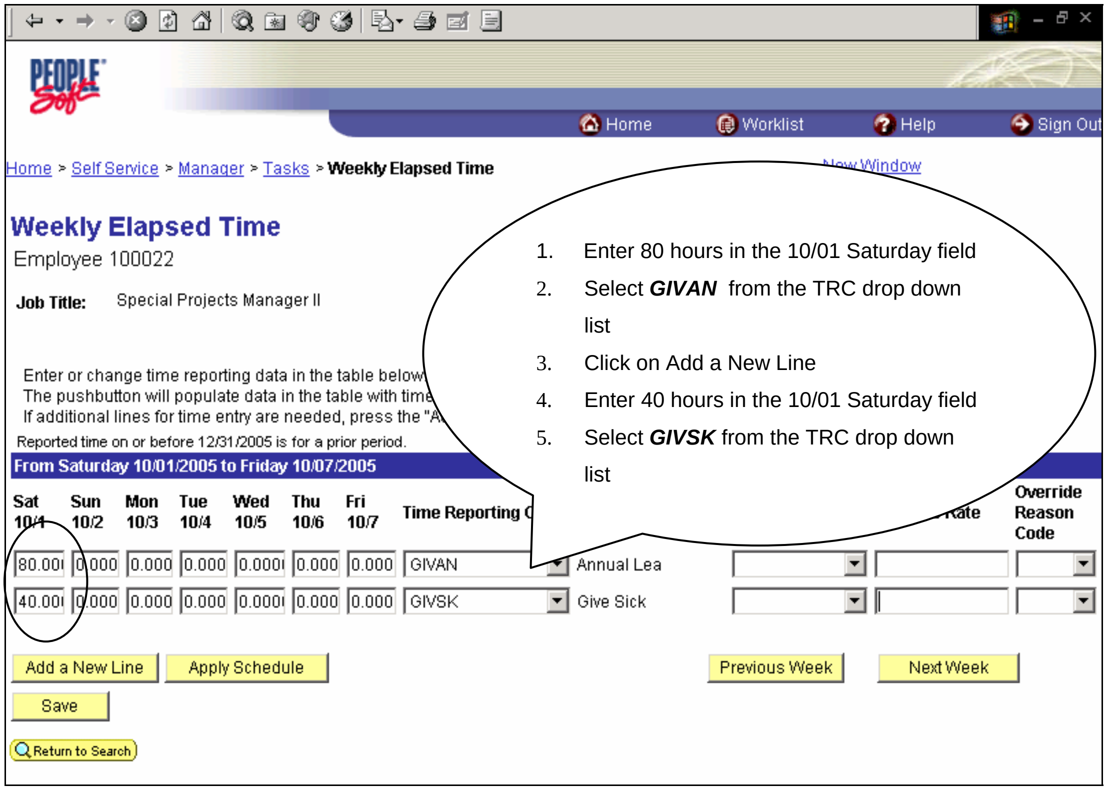
We will work through an example. In our example, ***Employee 100022 is giving 80 hours of sick leave and 40 hours of annual leave to employee 100001.***

We will take the hours out of the giving employee's time first.
Enter Employee ID – 100022
Date – 100105
Click on the yellow Search button.

Self Service > Manager > Tasks > Weekly Elapsed Time



WEEKLY ELAPSED TIME



These are the entries to take the annual and sick leave out of the giving employee's balances.

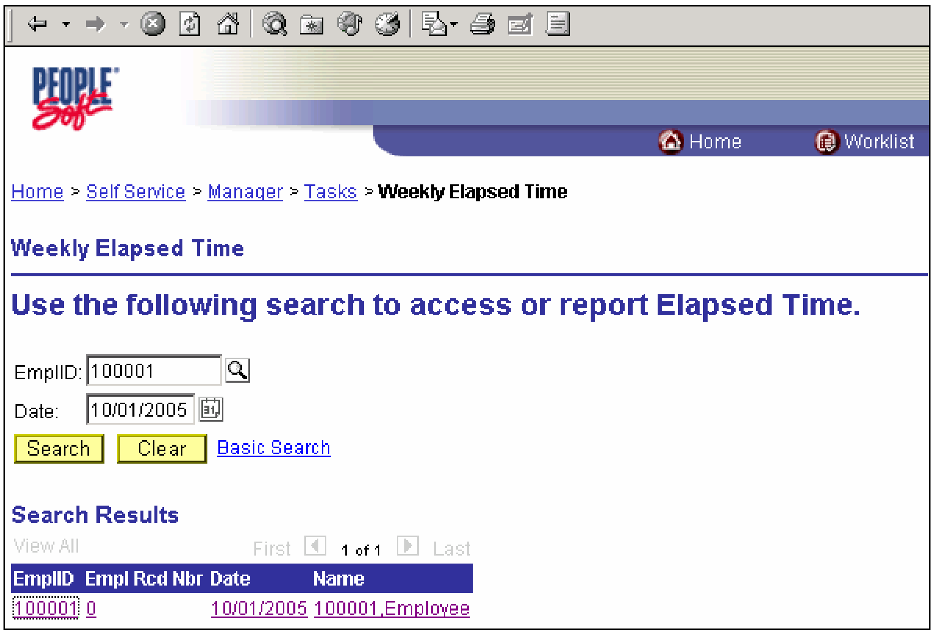
Now – we have to post the given time to the RECEIVING employee ID balances. We will do this on the following page.

RECEIVING THE SHARED LEAVE - EMPLOYEE 100001

SELF SERVICE > MANAGER > TASKS > WEEKLY ELAPSED TIME

.Enter Employee ID of ***100001*** and Date of ***10/01/05***.

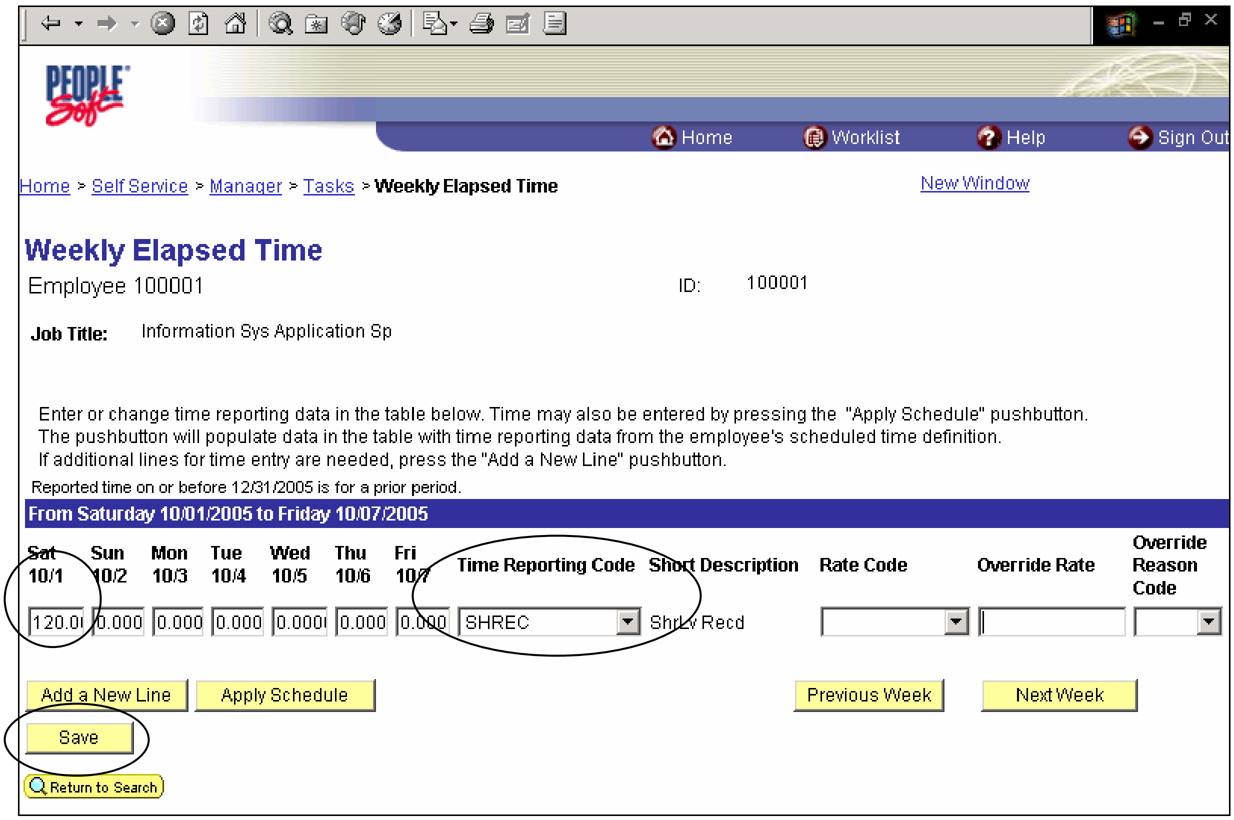
Click on the yellow ***SEARCH*** button.



SELF SERVICE > MANAGER > TASKS > WEEKLY ELAPSED TIME

Key ***120 hours*** into the Saturday ***10/01*** field.

Select ***SHREC*** from the TRC drop down list.

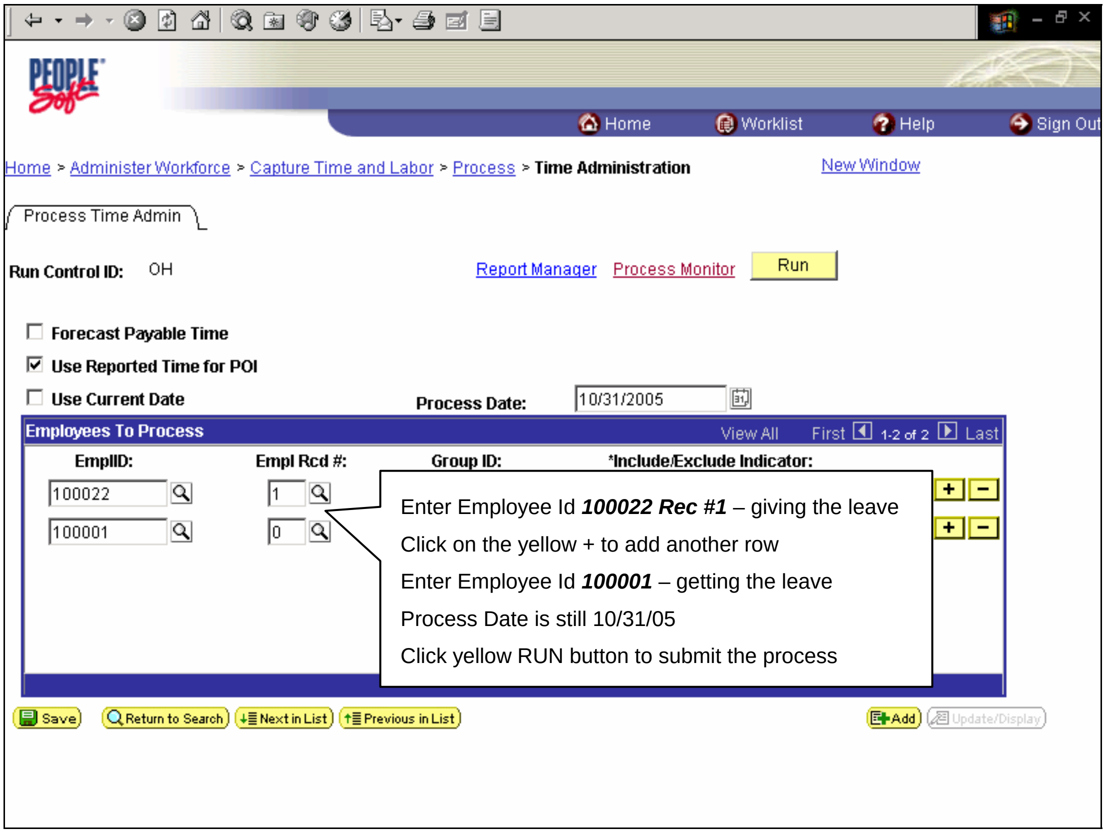


Click on the ***yellow SAVE button***.

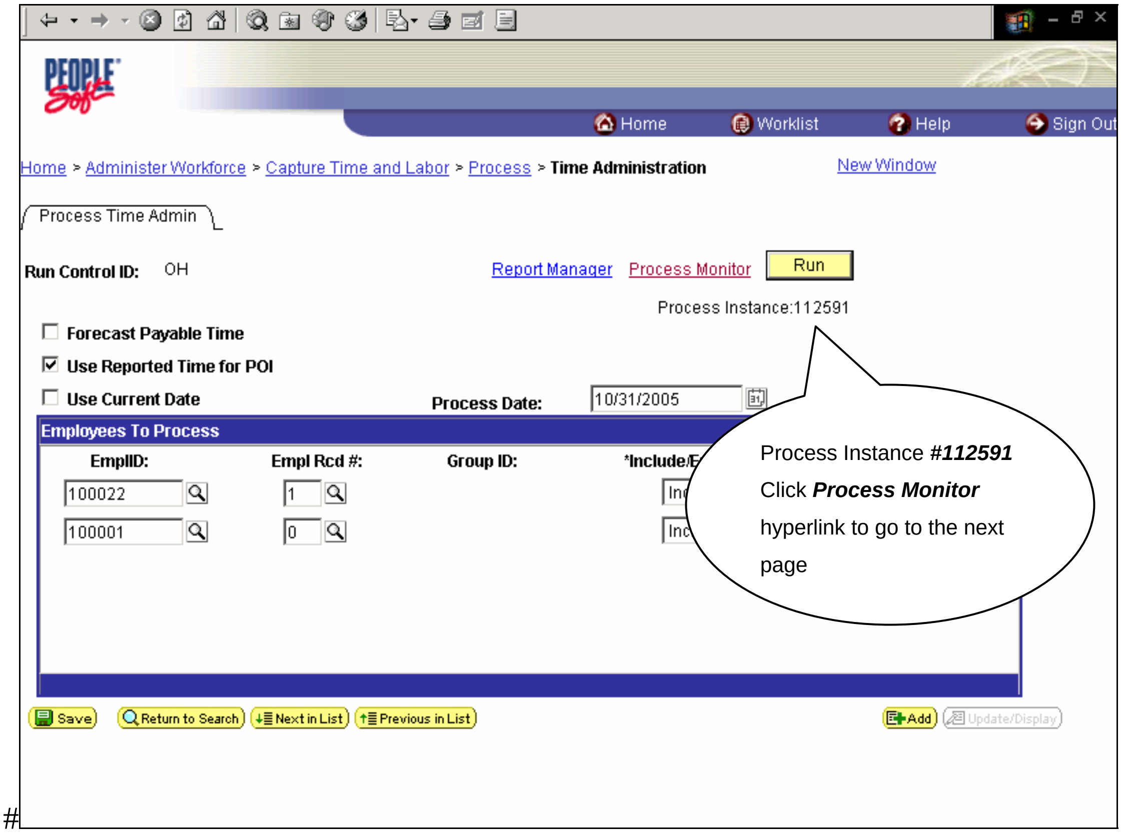
The next step is running Time Admin.

Running Time Administration for Both Employees

Administer Workforce > Capture Time and Labor > Process > Time Administration >Run control



When the process is submitted, the system assigns a process instance .



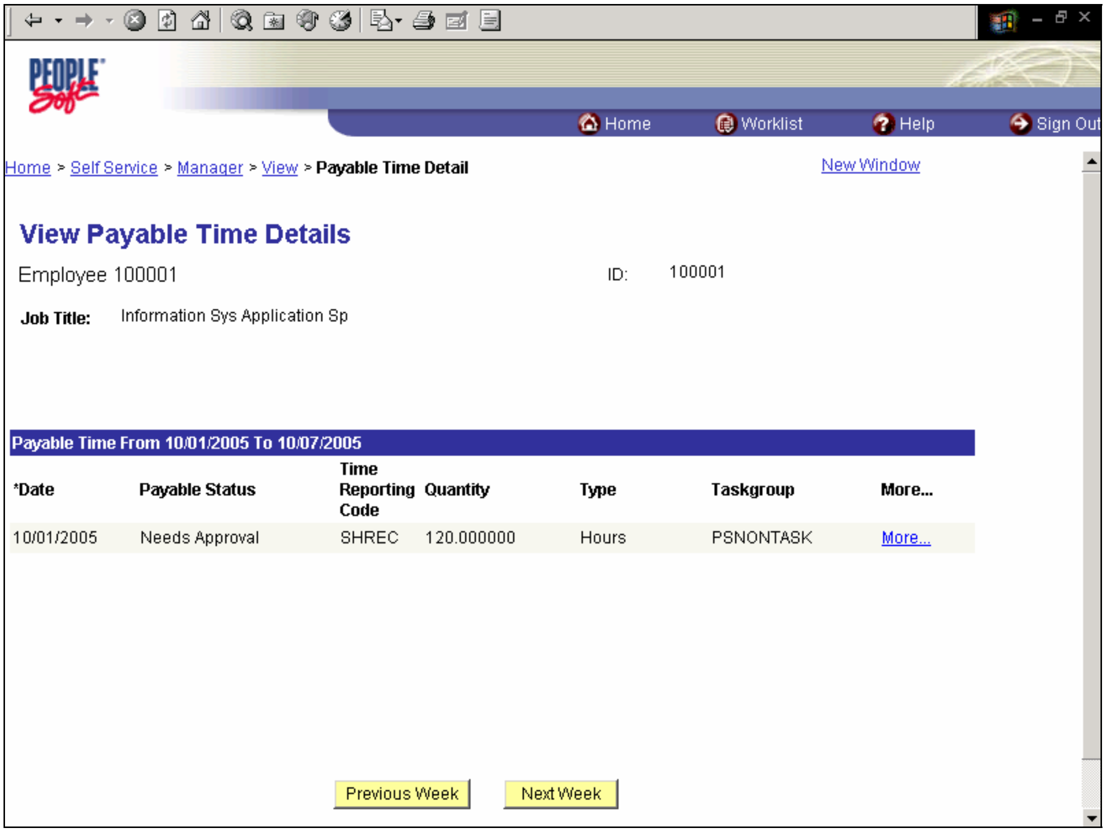
#

Run the process to Success and

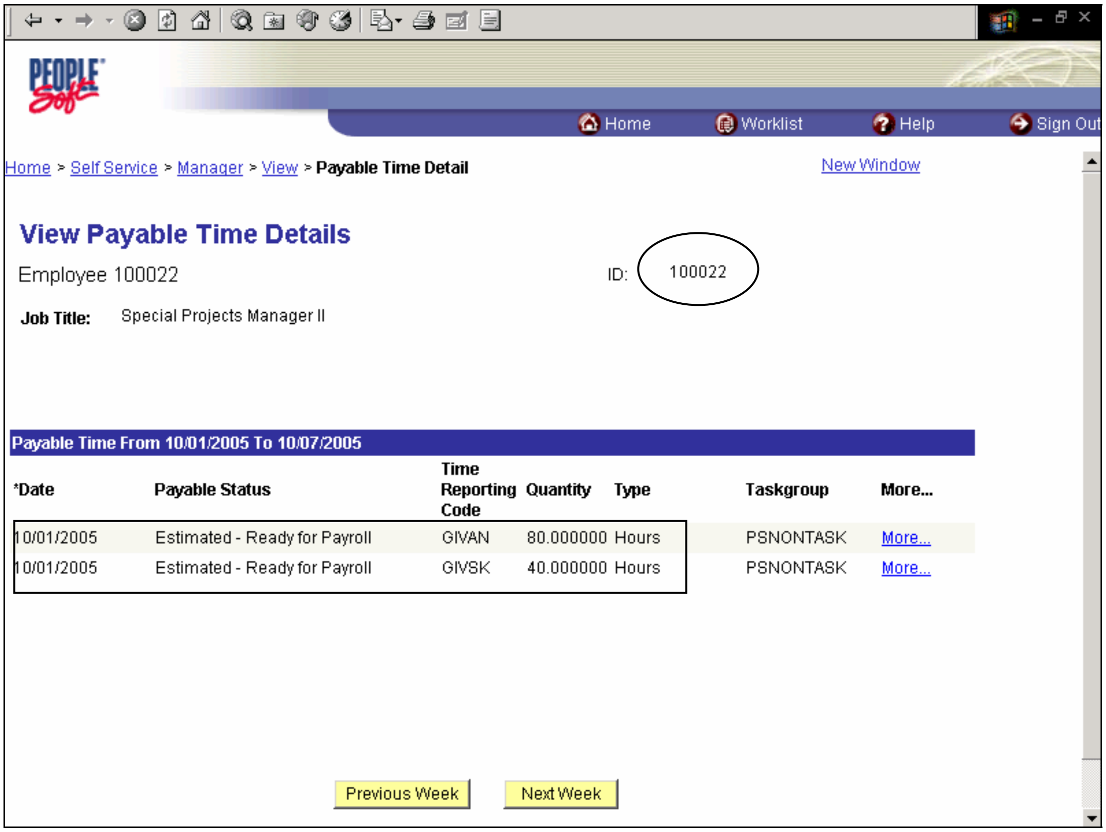
go through the usual checking of ***Details*** and the ***Message Log***.

Employee 100001 – receiving the leave

SELF SERVICE > MANAGER > VIEW > PAYABLE TIME DETAIL



EMPLOYEE ID 100022 – GIVING THE LEAVE



These two entries will reduce the giving employee's (***100022***) Annual leave balance and Sick leave balance respectively when it posts through Payroll and the Leave Accrual Process is run.

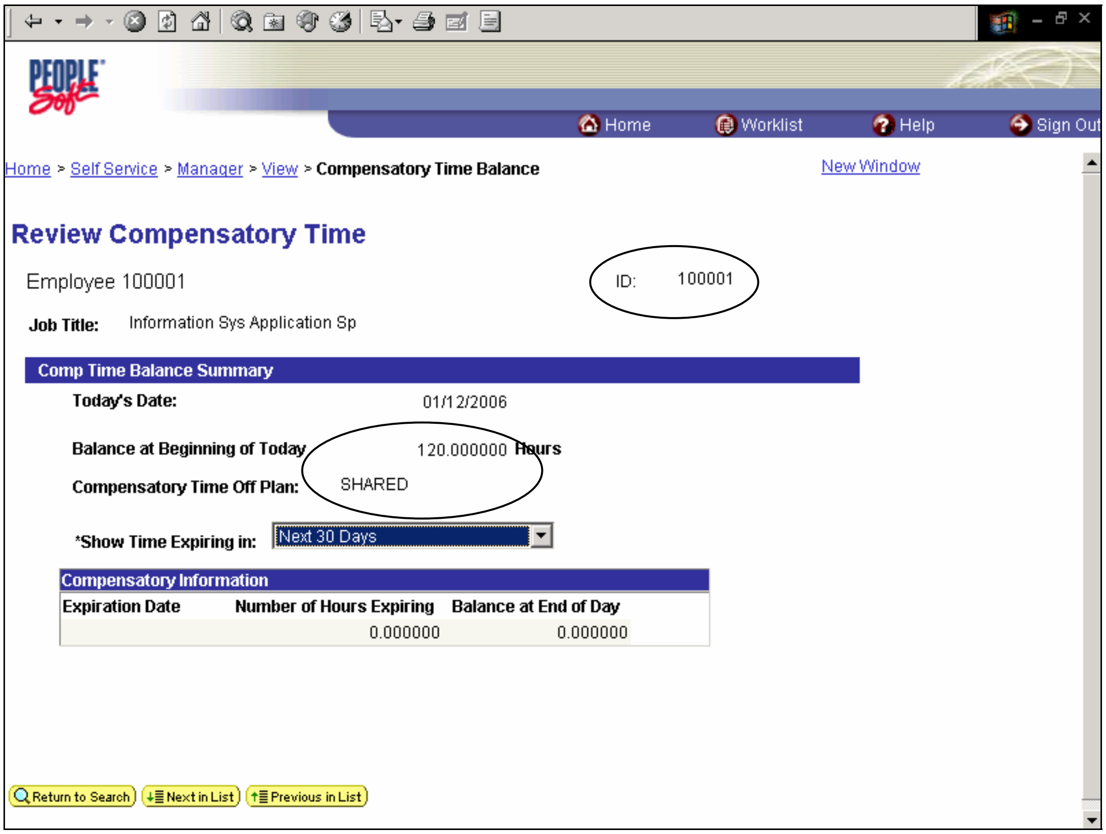
Now – we need to verify that the ***120 hours*** is available in employee ***100001***

SHARED Leave Balance

.

Review Compensatory Time Balance for Employee 100001

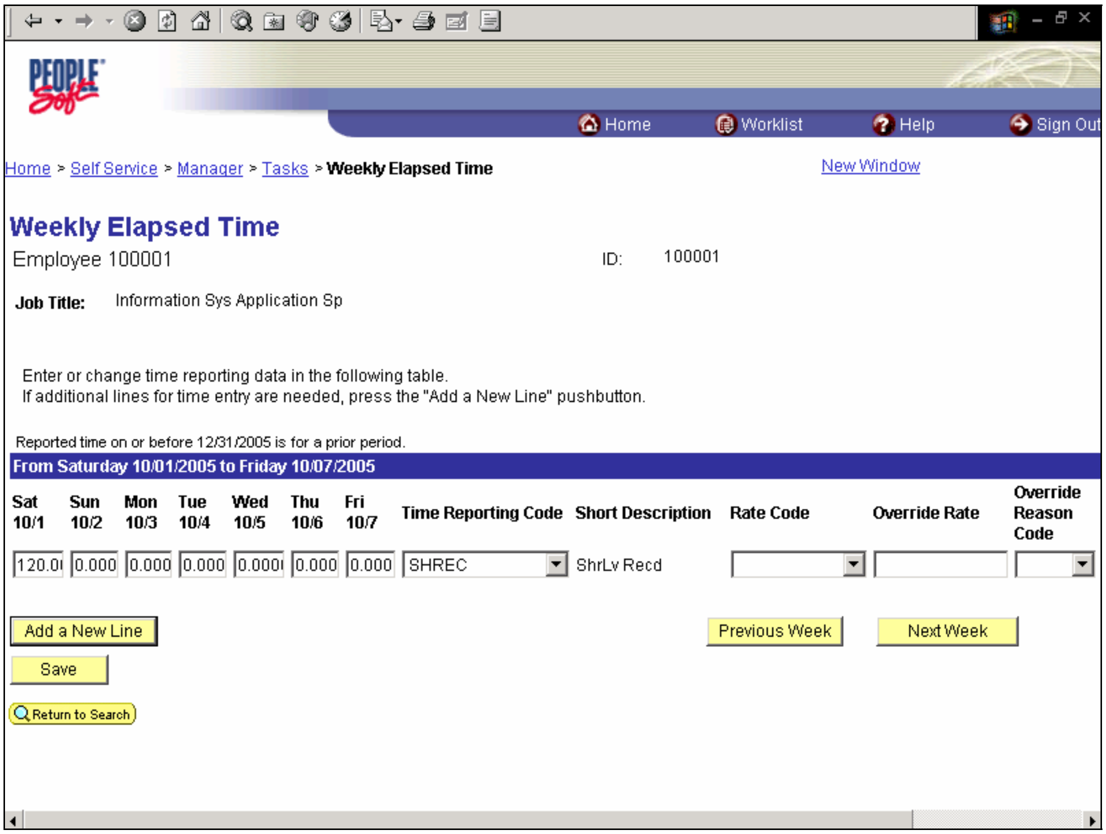
SELF SERVICE > MANAGER > VIEW > COMPENSATORY TIME BALANCE – EMPLOYEE 100001



Now that the balance is loaded, we are ready to use the shared leave.

USING SHARED LEAVE – EMPLOYEE 100001

SELF SERVICE > MANAGER > TASKS > WEEKLY ELAPSED TIME



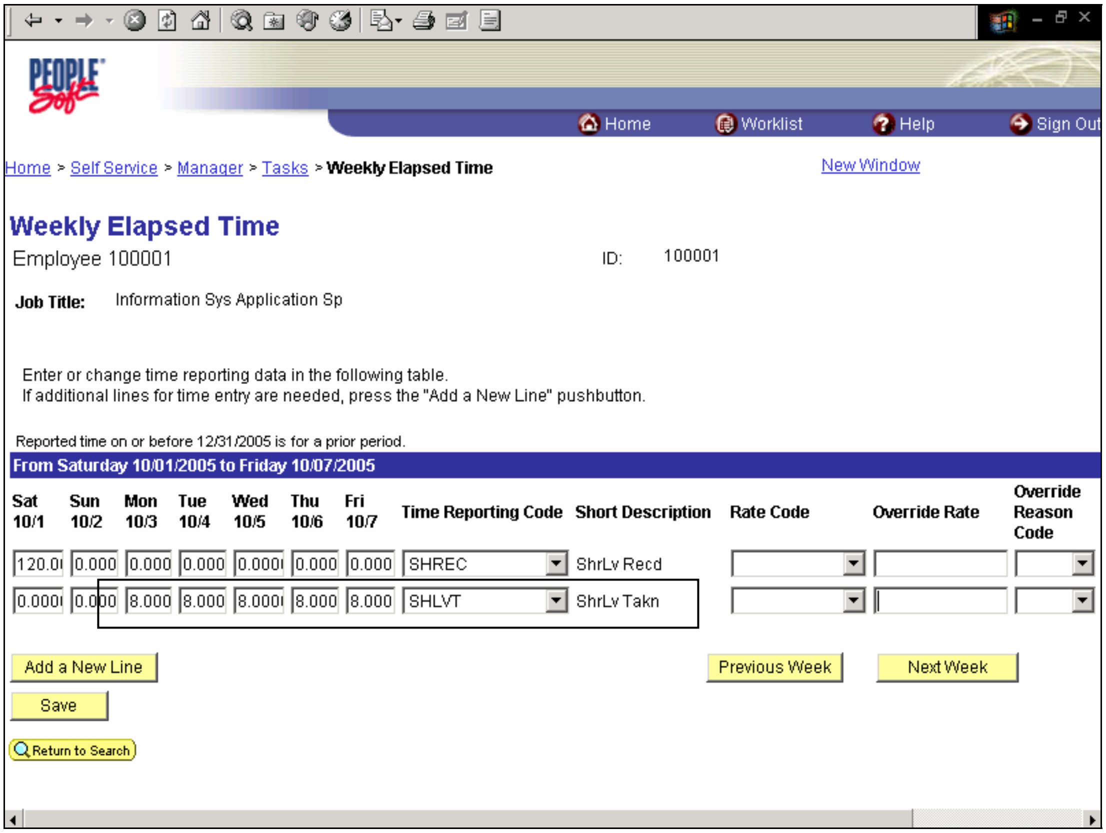
When we go back to the Weekly Elapsed Time Page starting with October 1 –

we see that the ***SHREC – Shared Leave Received*** is still sitting there – which is very good.

LEAVE IT ALONE!!!

Time and Labor has set a flag behind the scenes that you cannot see that tells the system that the SHREC row has already BEEN PROCESSED and not to process it again.

CLICK ON THE ***ADD A NEW LINE*** BUTTON



Key 8 hours a day into the Mon – Fri boxes – starting with 10/03.

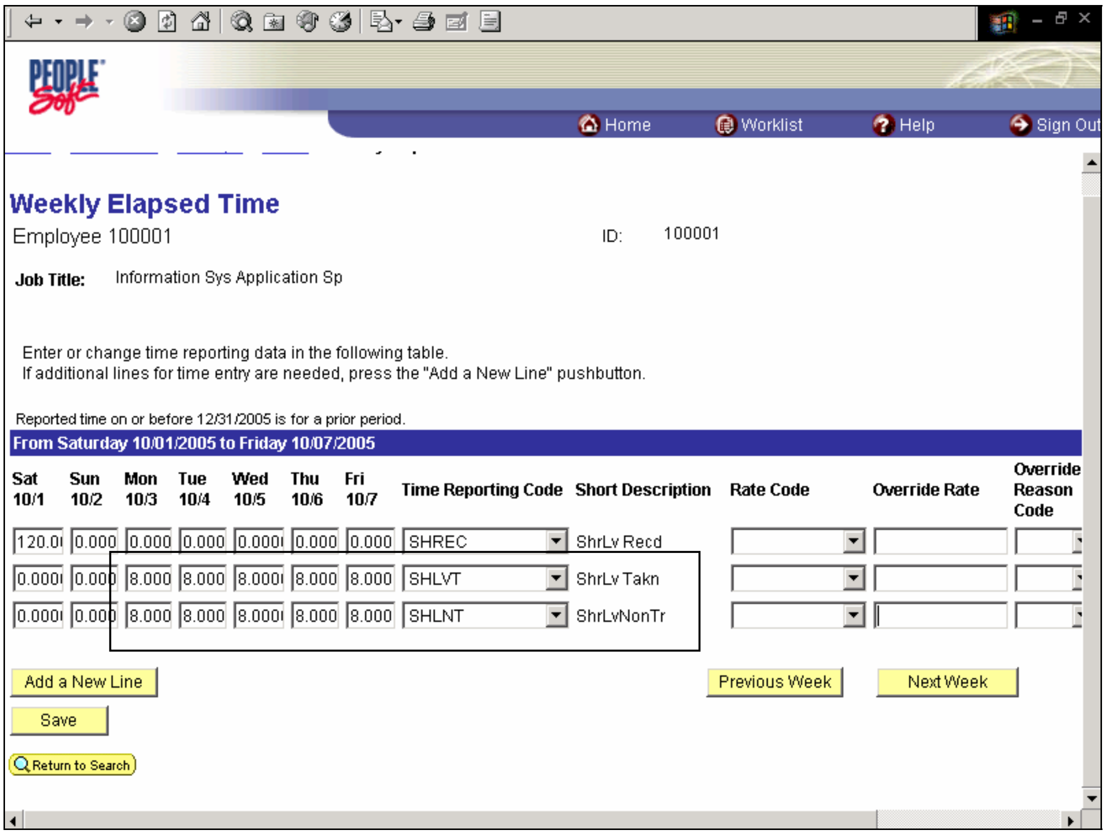
Select ***SHLVT*** from the Time Reporting Code drop down list.

SHLVT posts the time to ***Employee 100001 SHARED leave balance*** and pays the employee for it.

CLICK ON ***ADD A NEW LINE* – *AGAIN TO ADD ANOTHER ROW*.**

We must also post this time to the accumulator that we setup for it – ***SHLFNOTERM***.

We use the TRC of ***SHLNT*** to update the balance of the ***SHARED leave taken*** because there is an upper limit that the State will allow per person.



Click on the ***yellow SAVE button*** to save your work.

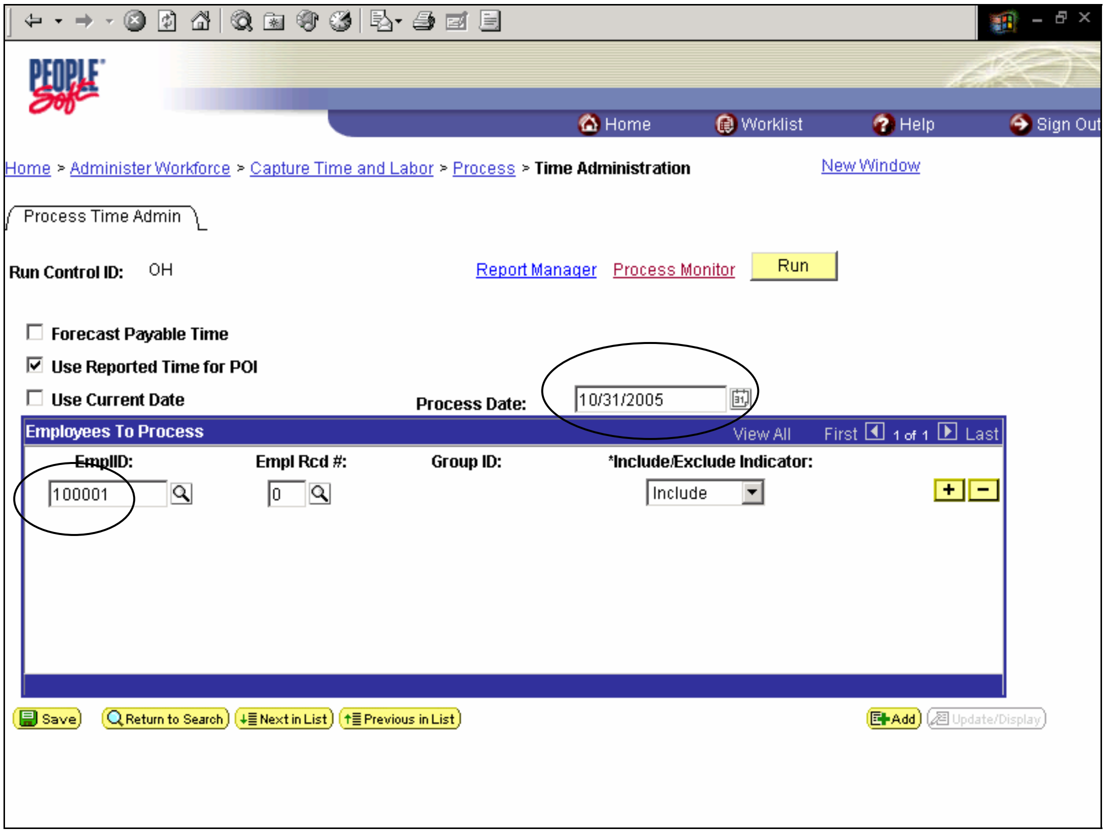
If you were using ***SHARED Leave*** for the ***more days*** in October –

click on the ***yellow Next Week button*** and enter the used days.

Always remember to ***SAVE*** before you change weeks.

The next step is to run the Time Administration Process again for the month of October.

Administer Workforce > Capture Time and Labor > Process > Time Administration



We are only going to process ***Employee 100001*** using the same date of ***10/31/05***.

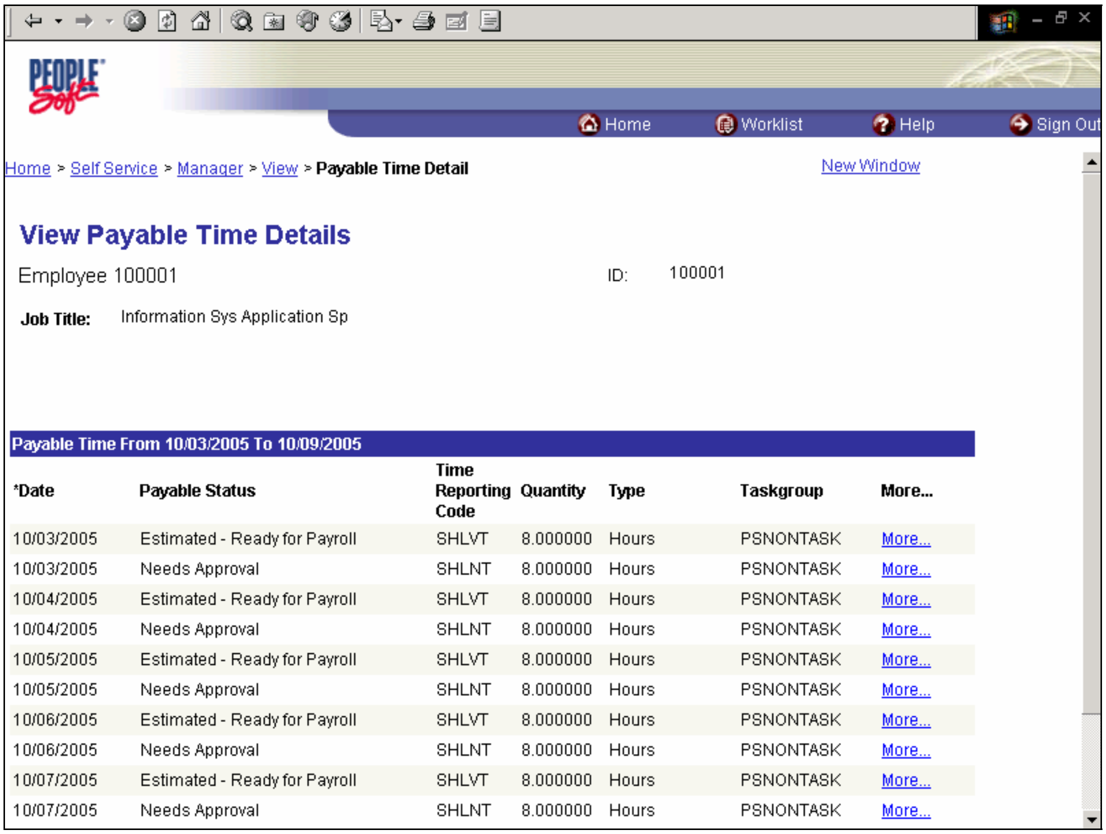
Run Time Administration on Process Scheduler to ***SUCCESS***

Check the ***DETAILS*** and the

ViewLog/Trace Message Log when it finishes.

Check Payable Time for Employee 100001

SELF SERVICE> MANAGER > VIEW> PAYABLE TIME DETAIL


Home > Self Service > Manager > View > Payable Time Detail   New Window

View Payable Time Details

Employee 100001   ID: 100001

Job Title: Information Sys Application Sp

Payable Time From 10/03/2005 To 10/09/2005

*Date	Payable Status	Time Reporting Code	Quantity	Type	Taskgroup	More...
10/03/2005	Estimated - Ready for Payroll	SHLVT	8.000000	Hours	PSNONTASK	More...
10/03/2005	Needs Approval	SHLNT	8.000000	Hours	PSNONTASK	More...
10/04/2005	Estimated - Ready for Payroll	SHLVT	8.000000	Hours	PSNONTASK	More...
10/04/2005	Needs Approval	SHLNT	8.000000	Hours	PSNONTASK	More...
10/05/2005	Estimated - Ready for Payroll	SHLVT	8.000000	Hours	PSNONTASK	More...
10/05/2005	Needs Approval	SHLNT	8.000000	Hours	PSNONTASK	More...
10/06/2005	Estimated - Ready for Payroll	SHLVT	8.000000	Hours	PSNONTASK	More...
10/06/2005	Needs Approval	SHLNT	8.000000	Hours	PSNONTASK	More...
10/07/2005	Estimated - Ready for Payroll	SHLVT	8.000000	Hours	PSNONTASK	More...
10/07/2005	Needs Approval	SHLNT	8.000000	Hours	PSNONTASK	More...

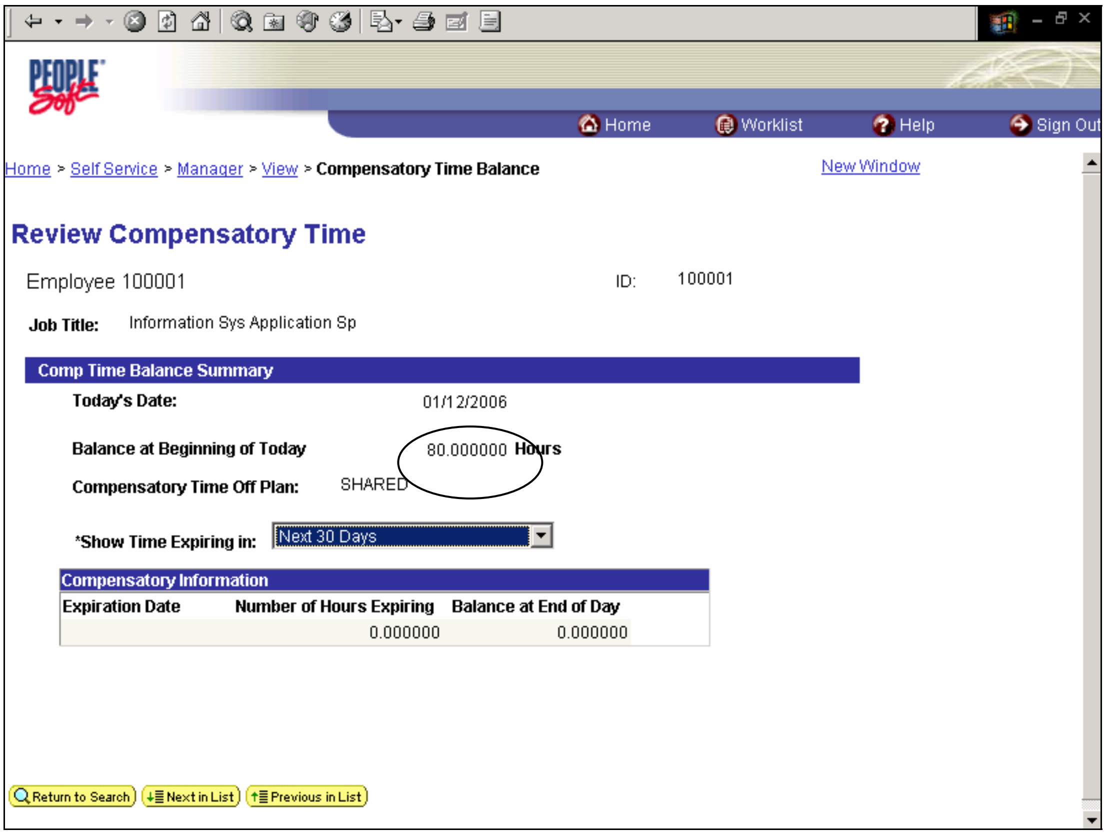
The ***SHLVT*** rows are marked – ***Estimated – Ready for Payroll***.

These lines will ***go onto PAYROLL and pay the employee for this time***.

The ***SHLNT*** rows are marked – ***Needs Approval (which they really don't)*** and they have updated the ***SHARED LEAVE Comp Time Balance*** and the SHARED Leave NonTerm Accumulator (***SHLFNOTERM Comp Time Balance***).

CHECK SHARED COMP TIME BALANCE – EMPLOYEE 100001

SELF SERVICE > MANAGER > VIEW > REVIEW COMPENSATORY TIME BALANCE



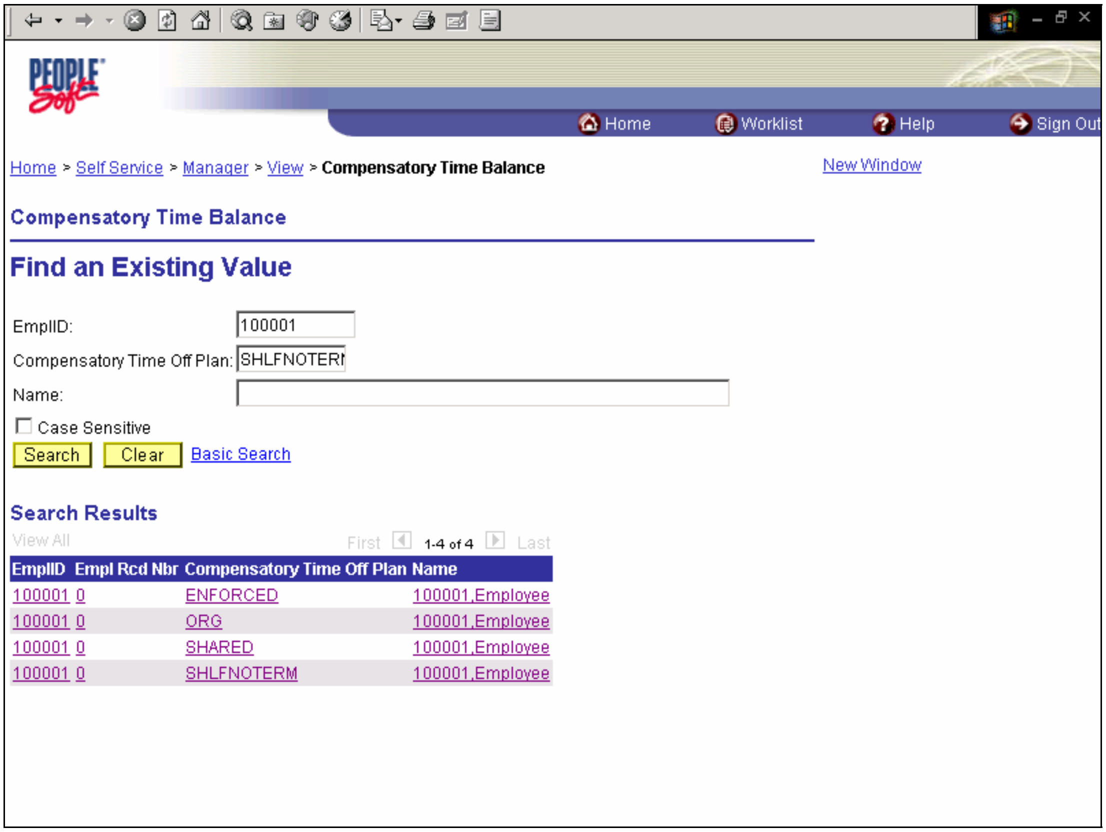
SHARED Leave now shows a ***balance of 80 hours*** since it just ***subtracted the 40 hours*** from it that we posted.

Now – we need to check the ***accumulator balance SHLFNOTERM***

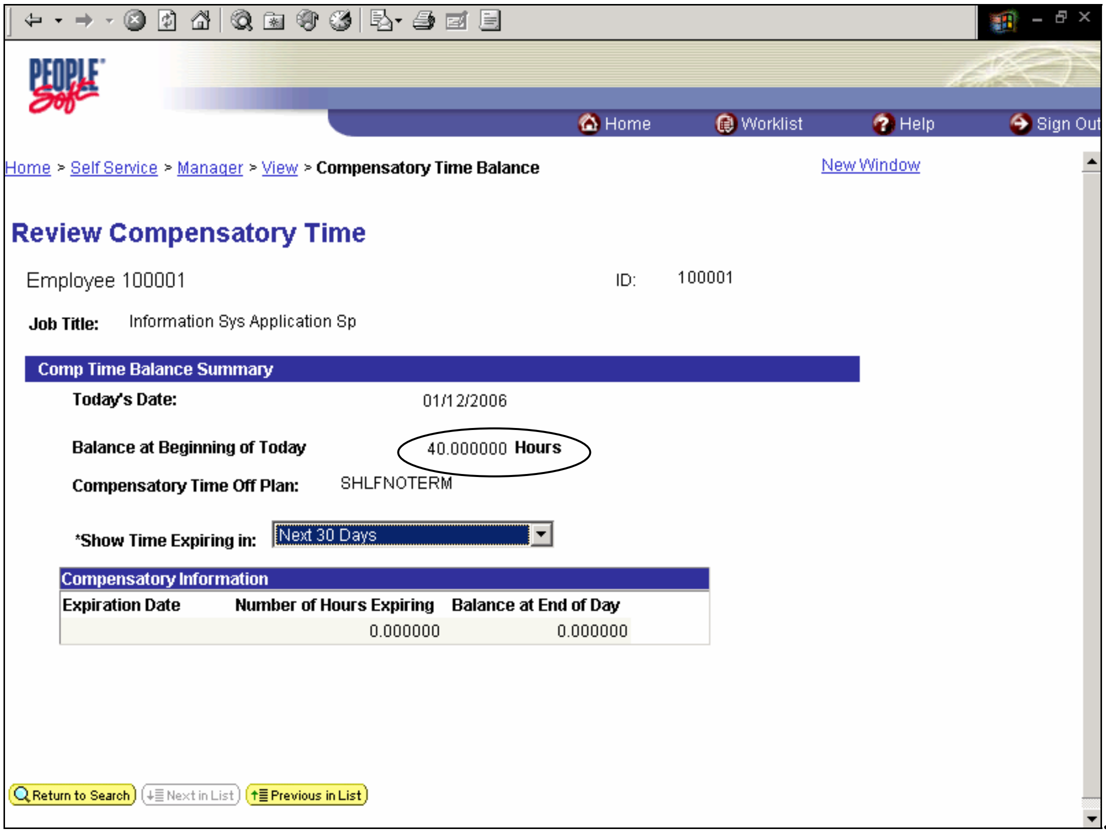
Click on the ***yellow button Return to Search***.

.

RETURN TO SEARCH GIVES ME THIS ***LIST*** OF THIS EMPLOYEE'S COMP TIME PLANS.



Click on ***SHLFNOTERM***.



This accumulator shows a ***balance of 40 hours*** now since we ***posted the 40 hours through Time Administration.***

Posting Shared Leave Time Document

There have been issues with transferring time from the sick and annual leave balances to the shared leave comp time plan. New codes were created effective October 13 to transfer balances back from shared leave to the sick or annual leave balance of the original giver. With the creation of these new codes…the ANNGV and SICGV codes have been removed as of October 13.

Please correctly use the codes below to post and manage shared leave. Deviation from the following will cause the employee leave statement and shared leave balances to be incorrect.

Use these first three codes to ***transfer from one employees annual*** or sick balance to another employees shared leave balance.

TRC	**Short Description**	**Purpose**
GIVAN	Give AnnLv	Annual Leave Given is used to reduce the annual leave balance of an employee **giving** leave to somebody else.
GIVSK	Give SicLv	Sick Leave Given is used to reduce the sick leave balance of an employee **giving** leave to somebody else.
SHREC	ShrLv Recd	Shared Leave Received is used to add hours to an employees shared leave balance.

Use the following two codes together to ***post time taken*** for an employee on a non-terminal shared leave. These two codes **must always be used together.**

SHLVT	ShrLv Takn	Shared Leave Taken is used to post time taken. Enter a positive number to reduce the employees shared leave balance.
SHLNT	ShrLvNonTr	Shared Leave Non-Terminal is used to track the use of the non-terminal leave. The limit is 2088 hours. Enter a positive number to add to the amount of leave used.

Use the following two codes together to ***post time taken*** for an employee on a terminally ill shared leave. These two codes **must always be used together.**

SHLVT	ShrLv Takn	Shared Leave Taken is used to post time taken. Enter a positive number to reduce the employees shared leave balance.
SHLTR	ShrLvTerm	Shared Leave Terminally Ill is used to track the use of the terminal leave. The limit is 2920 hours. Enter a positive number to add to the amount of leave used.

Use the following codes to ***make adjustments*** to the shared leave balances. If Shared is adjusted, then the non-terminal or terminally ill values must also be adjusted.

SHLAD	ShrLv Adj	Shared Leave Adjustment is used to add hours or reduce hours from the shared leave balance. Positive numbers add to the balance, negative numbers reduce the balance.
SHLNA	ShrLvNTAdj	Shared Leave Non-Term Adjust is used to add hours or reduce hours from the amount of leave used for employees on non-terminal leave.
SHLTA	ShrLvTrAdj	Shared Leave –Term Ill Adjust is used to add hours or reduce hours from the amount of leave used for employees on terminally ill leave.

When the ***employee returns to work*** use the following codes to give back any available shared leave balance to the employee that gave the sick or annual leave.

SHLGV	Give ShrLv	Shared Leave Given Back is used to reduce the shared leave balance. Enter a positive number to reduce the shared leave balance for the employee that was on the shared leave.
ANREC	AnnLv Recd	Annual Leave Received is used to post annual leave time to the employee that originally donated it. Enter a positive number to add hours back to the employees annual leave balance.
SICRC	SicLv Recd	Sick Leave Received is used to post sick leave time to the employee that originally donated it. Enter a positive number to add hours back to the employees sick leave balance.

PROCESSING SICK AND ANNUAL LEAVE

OVERVIEW

The State of Oklahoma has designed the leave process to use the Time and Labor function in PeopleSoft. All annual leave and sick leave used has to be keyed into the Weekly Elapsed Time Page in Time and Labor and processed through Time and Labor

All the sick time taken entries and annual leave taken entries must have payable time generated for them and the payable time has to be sent onto payroll so that the leave time will be posted to the leave plans and update the appropriate balances.

The leave accrual process for sick leave and annual leave is run once a month on the next to last day of the month after all the payrolls for that month have been confirmed.

The State of Oklahoma has designed a Leave Statement Report that looks at Payable Time and selects the leave time with a status of TP (Taken by Payroll) and includes that time in the Leave Statement numbers. This is the reason that sick and annual leave time taken must go through Time and Labor in order for the Leave Statements to be correct.

Sick Leave and Annual Leave are considered part of the Base Benefits part of PeopleSoft. We will enroll employees in these plans in the Base Benefits portion of the training in the afternoon. We will work with employees that are already enrolled in these Benefit Plans for our Time and Labor exercises.

TIME REPORTING CODES (TRCS) FOR SICK AND ANNUAL LEAVE

There is special group of TRCs for sick and annual leave. Each agency has a list of their specific codes. We will use the TRC List for Agency 805 as our example.

TRCS FOR ANNUAL LEAVE – AGENCY 805

TRC	Descr	TRC Type	*Earn Code*	Comp Leave Ind	Add to Gross
ANNAD	Annual Leave Adjustment	Hours	***ANA***	NO	N
GIVAN	Annual Leave Given	Hours	***ANG***	LTKN	N
TERM	Annual Leave Payout	Hours	***ALP***	NO	Y
ANREC	Annual Leave Received	Hours	***ANR***	NO	N
ANNLV	Annual Leave Salaried	Hours	***ANL***	LTKN	N
ANNHR	Annual Leave Hourly	Hours	***ANH***	LTKN	N

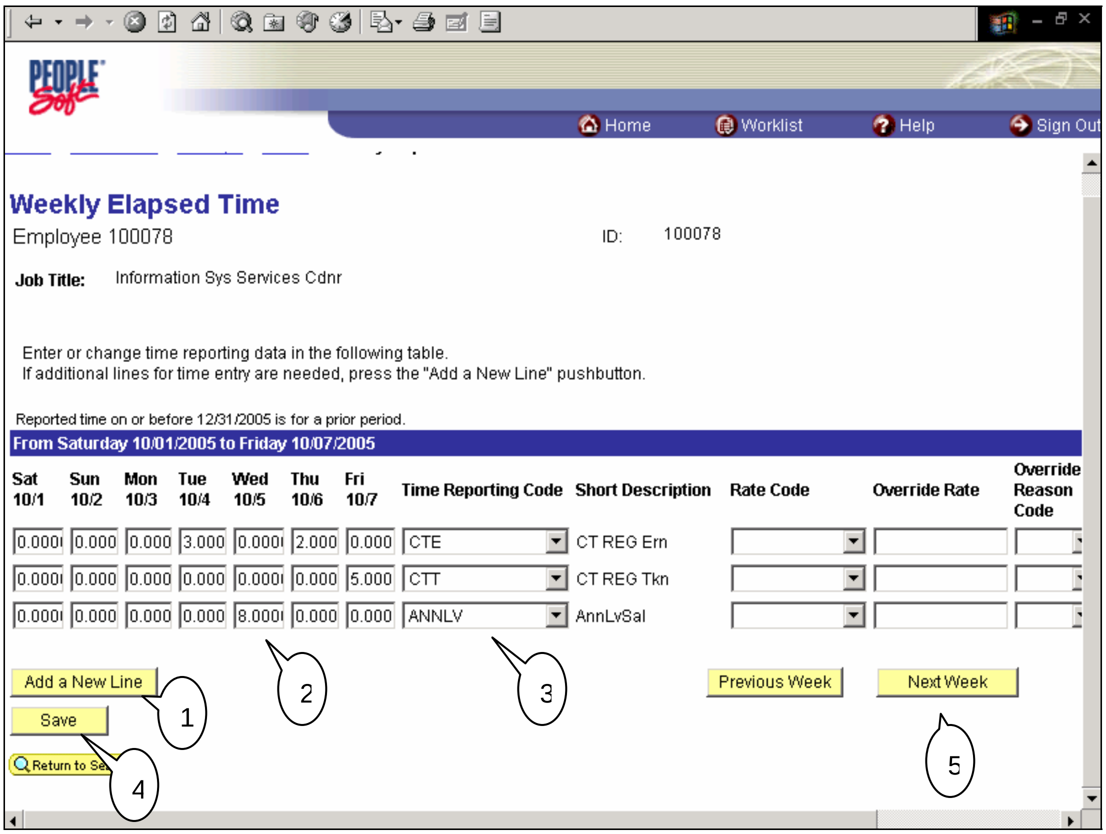
TRCS FOR SICK LEAVE – AGENCY 805

TRC	Descr	TRC Type	*Earn Code*	Comp Leave Ind	Add to Gross
SICAD	Sick Hours Adjustment	Hours	***SCA***	NO	N
SICGV	Sick Hours Given	Hours	***SCA***	NO	N
GIVSK	Sick Hours Given	Hours	***SKG***	LTKN	N
WCSH	Sick Leave Hourly	Hours		NO	Y
SICRC	Sick Leave Received	Hours	***SKR***	NO	N
SCKTK	Sick Leave Salaried	Hours	***SKL***	LTKN	N
WCSS	Sick Leave Salaried	Hours	***SKL***	NO	N
SCKHR	Sick Leave Hourly	Hours	***SKH***	LTKN	N

ENTERING THE ANNUAL LEAVE TAKEN

Employee ***100078*** took ***8 hours of annual leave on October 5*** and
6 hours of sick leave on October 11

SELF SERVICE > MANAGER > TASKS > WEEKLY ELAPSED TIME



Click on ***Add a New Line***

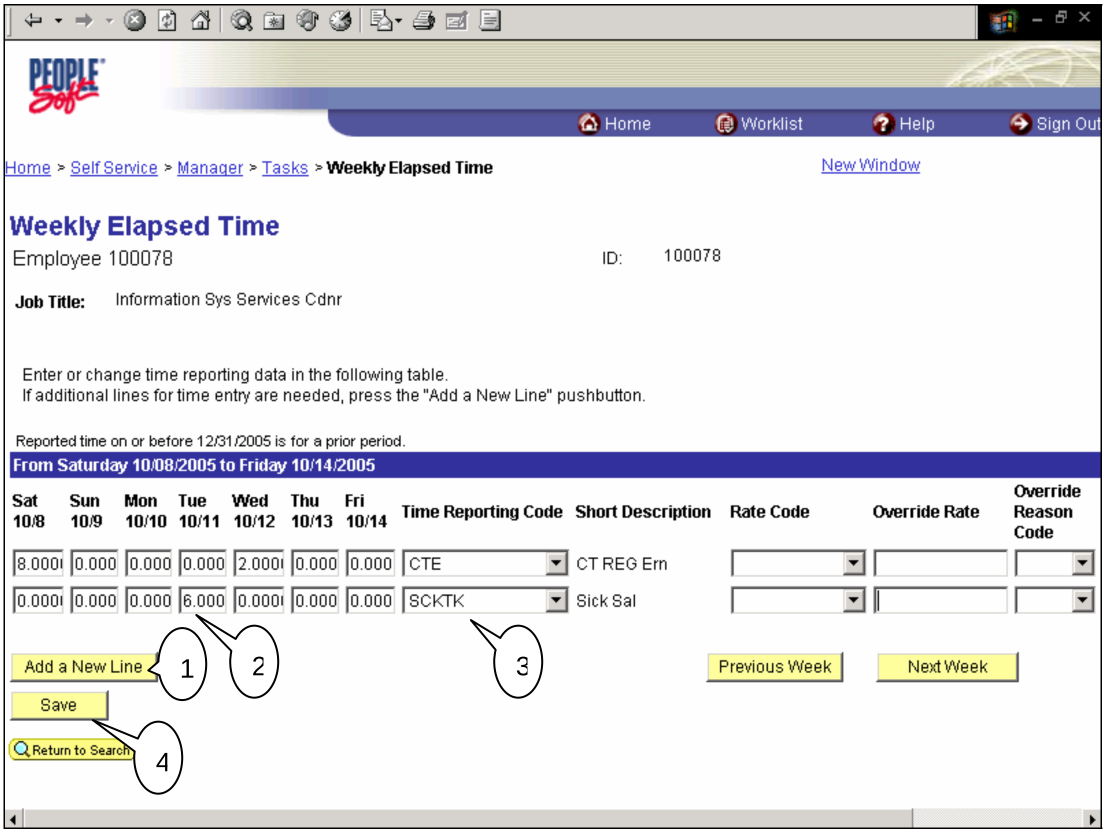
Key 8 hours under the ***Wednesday field*** on the new line

Select ***ANNLV*** from the time reporting code (TRC) drop down list

Click on ***Save.***

Click on the ***Next Week yellow button.***

Entering the Sick Leave taken



CLICK ON ***ADD A NEW LINE***

Key 6 into the field under ***Tuesday October 11***

Select ***SCKTK*** from the Time Reporting Code drop down list (TRC)

Click on the ***yellow SAVE button***.

We have finished entering our leave time for this employee.

Next step – ***Run Time Administration Process***

Run Time Administration Process for Employee ID 100078

Now – we will run the time administration process using the ***process date of .10/31/05***.

We will follow the same steps to process this leave through time administration as we did when we processed the comp time through time administration. .

When time administration finishes, we will ***check for payable time*** – just as we. . did for the comp time.

. . . .

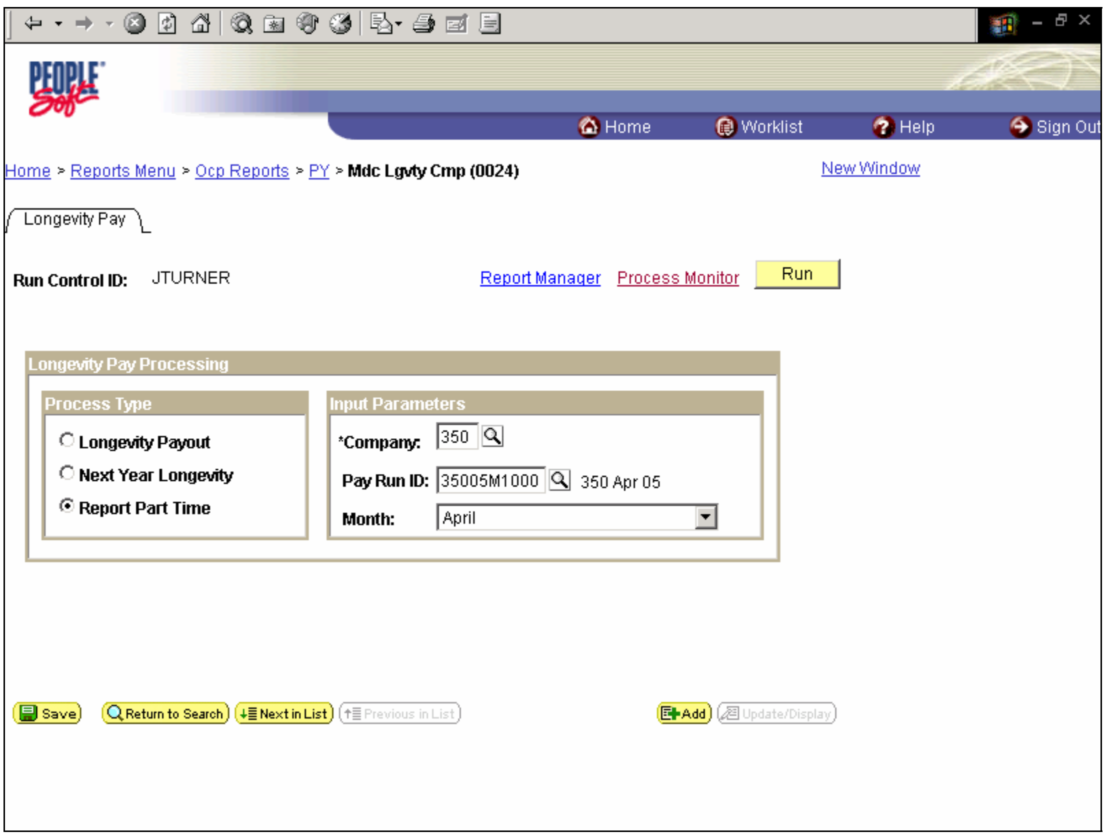
PROCESSING LONGEVITY

PARTIAL LONGEVITY

The first step on the Main and Supplemental Payroll Processing Steps thru Confirm Check List is running the Longevity Part-time Process.

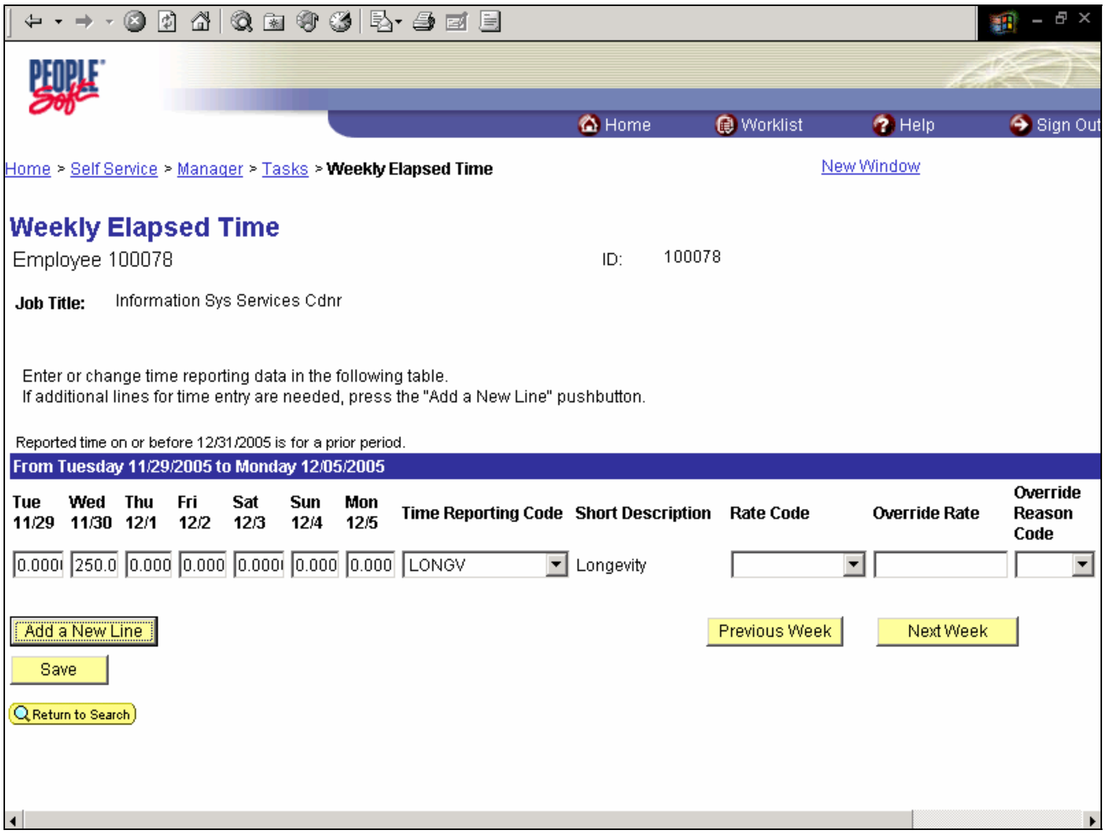
Reports Menu > OCP Reports > PY > MDC Lgvty Cmp (0024)

This step produces a report listing all the employees for the agency that would be eligible for a partial longevity. The payroll user must take this report and manually calculate the amount of Longevity the employee should be paid.



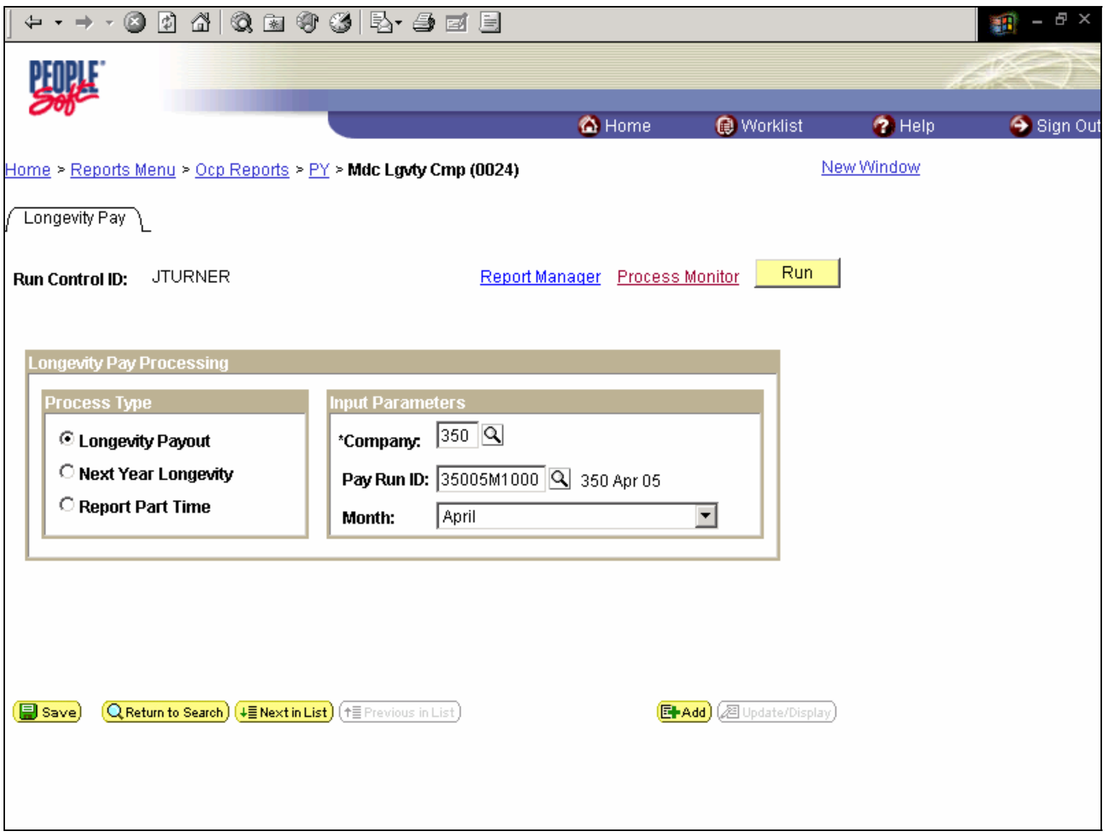
The payroll user takes the amount of money that the employee is due for his partial longevity and keys it into the Weekly Elapsed Time entry page on the day it is to be paid. Longevity is posted usually on the last day of the month as the following example illustrates.

SELF SERVICE > MANAGER > TASKS > WEEKLY ELAPSED TIME

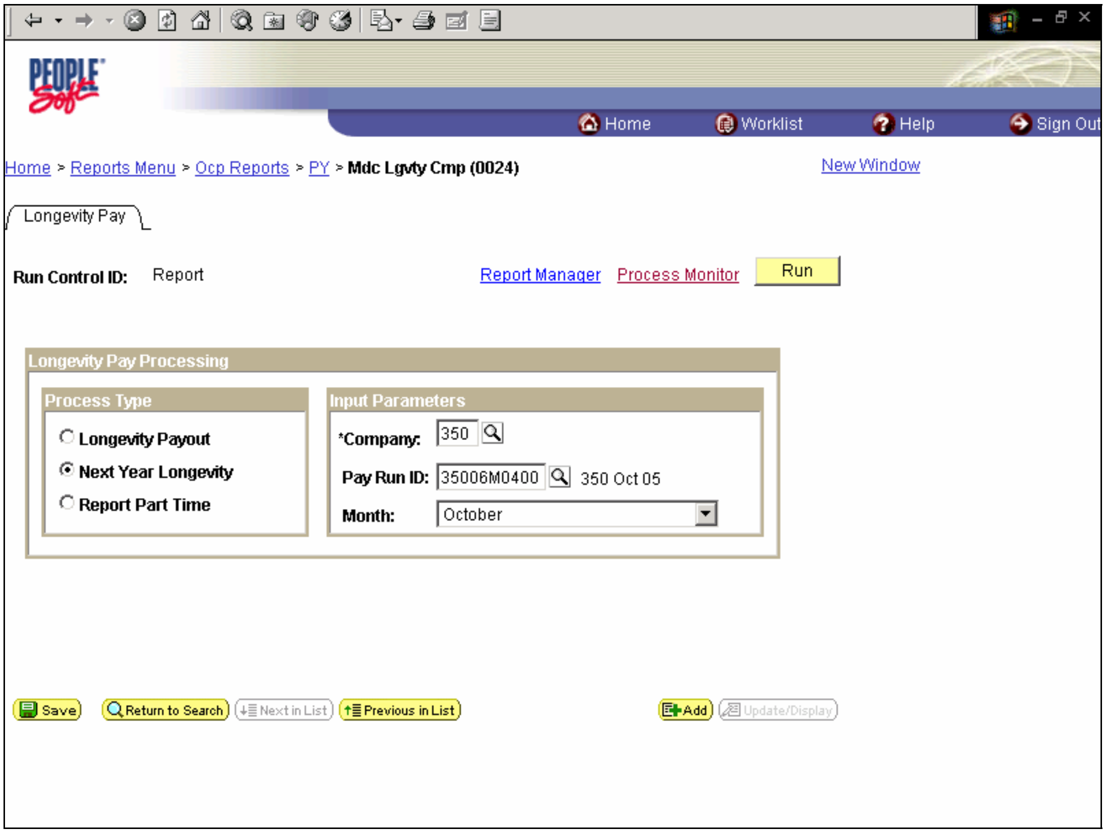


LONGEVITY PAYOUT – FIRST LONGEVITY PROCESS – STEP 2

The second step on the Main Payroll Checklist is to run the First Longevity Process. This process produces a report and it updates Weekly Elapsed Time on the last day of the month with the ***LONGV*** Time Reporting Code and the amount of money that is owed the employee.



NEXT YEAR LONGEVITY – SECOND LONGEVITY PROCESS - STEP 10



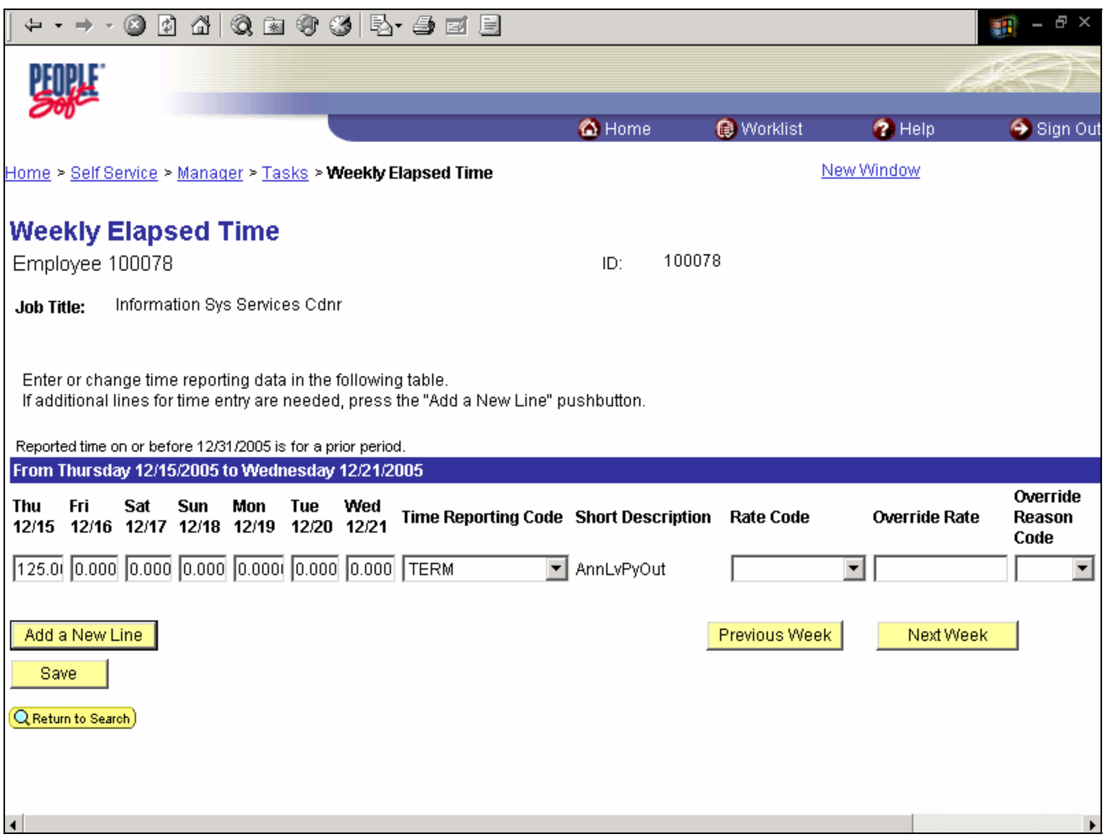
PROCESSING TERMINAL LEAVE PAYOUT

STEP 1 – ENTERING TIME INTO ELAPSED TIME

1. Key the number of hours the terminated employee is to be paid in Weekly Elapsed Time

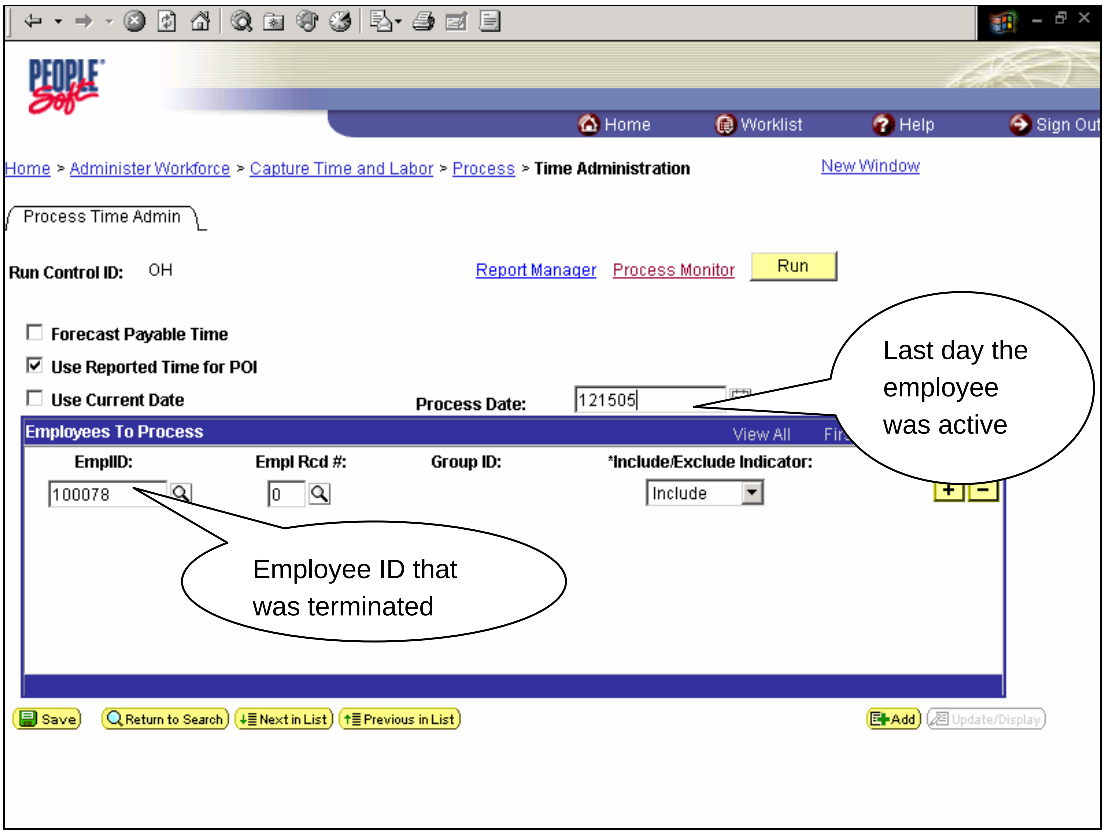
   Self Service > Manager > Tasks > Weekly Elapsed Time

   Select TRC of ***TERM***. ***Enter the hours on a date when the employee was ACTIVE***. *The last day this employee worked was 12/15/05 so his JOB Data record shows termination date of 12/16/05.*



STEP 2 - RUN TIME ADMINISTRATION BY EMPLOYEE ID

The Process Date on the run control for Time Administration should be the Last Date that the employee was ***ACTIVE***.



Example – Employee A's last day to work was 12/15/05
HR should terminate the employee as of 12/16/05

The process date on the Time Administration Run Control would be **12/15/05**.

Your run control may be showing only a line with Group ID in it.

Click on the ***yellow DELETE button*** on the right at the end of the line and the system will refresh that line and open up all the boxes – including the Employee ID box. Enter the Employee ID that you are processing.

Run the process by clicking on the ***yellow RUN button***.

2. Check the Message Log and be sure the 3rd line from the bottom of the report is ***BLANK*** and does not say "**No employees to process**". This message means that you did not process any employees successfully.

   So – you need to check for time and labor exceptions. Go to Step 4.

   If the 3rd line from the bottom of the report is a blank line, employees were processed. Go to Step 5.

3. Check for Time and Labor Exceptions –

   Administer Workforce > Capture Time and Labor > Manage > Manage Group Exceptions

   Enter Group ID – XXX01 if you are processing Salaried people
   XXX02 if you are processing the other group

   Click ***Search***

   You are hoping for '***No matching values were found.***' message which means you do not have any errors

   You can also check exceptions by Employee ID.

   Administer Workforce > Capture Time and Labor > Manage > Manage Exceptions

   Enter Employee ID and ***click Search***

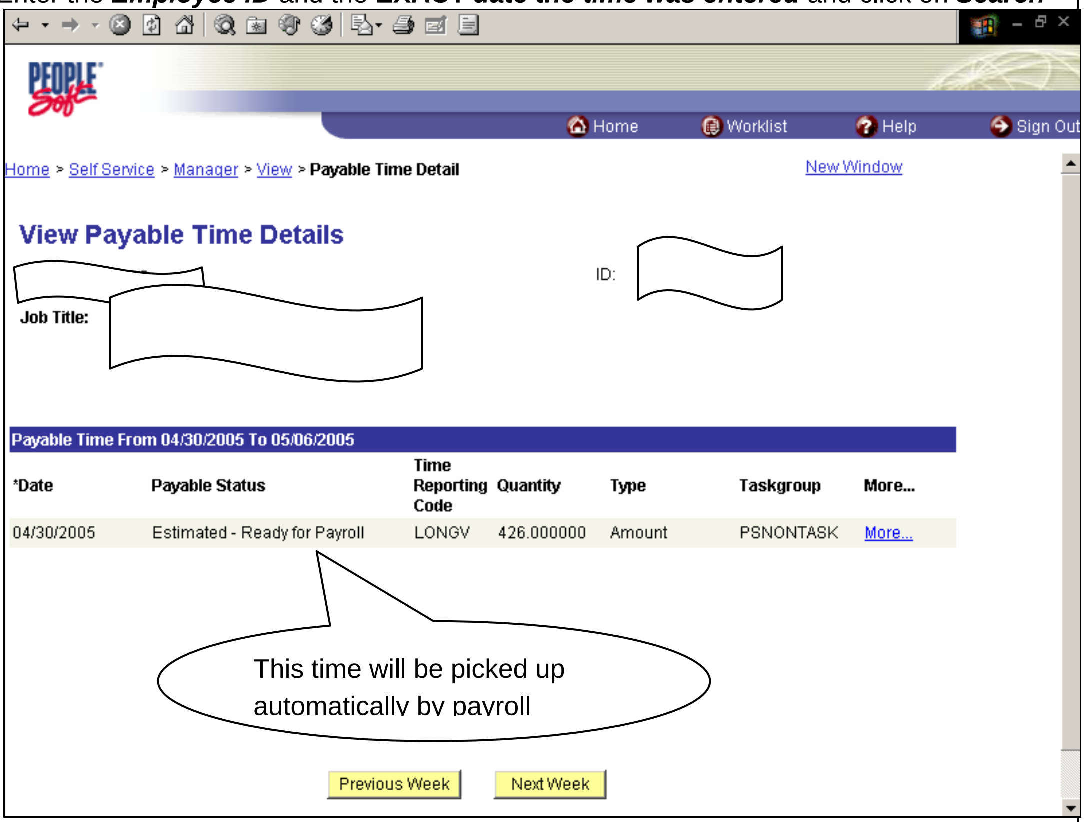
   You are hoping for '***No matching values were found.***' message which means you do not have any errors

STEP 3 - CHECK PAYABLE TIME DETAIL

Be sure that the time says – ***Estimated – Ready for Payroll***

Self Service > Manager > View > Payable Time Detail

Enter the ***Employee ID*** and the **EXACT** ***date the time was entered*** and click on ***Search***



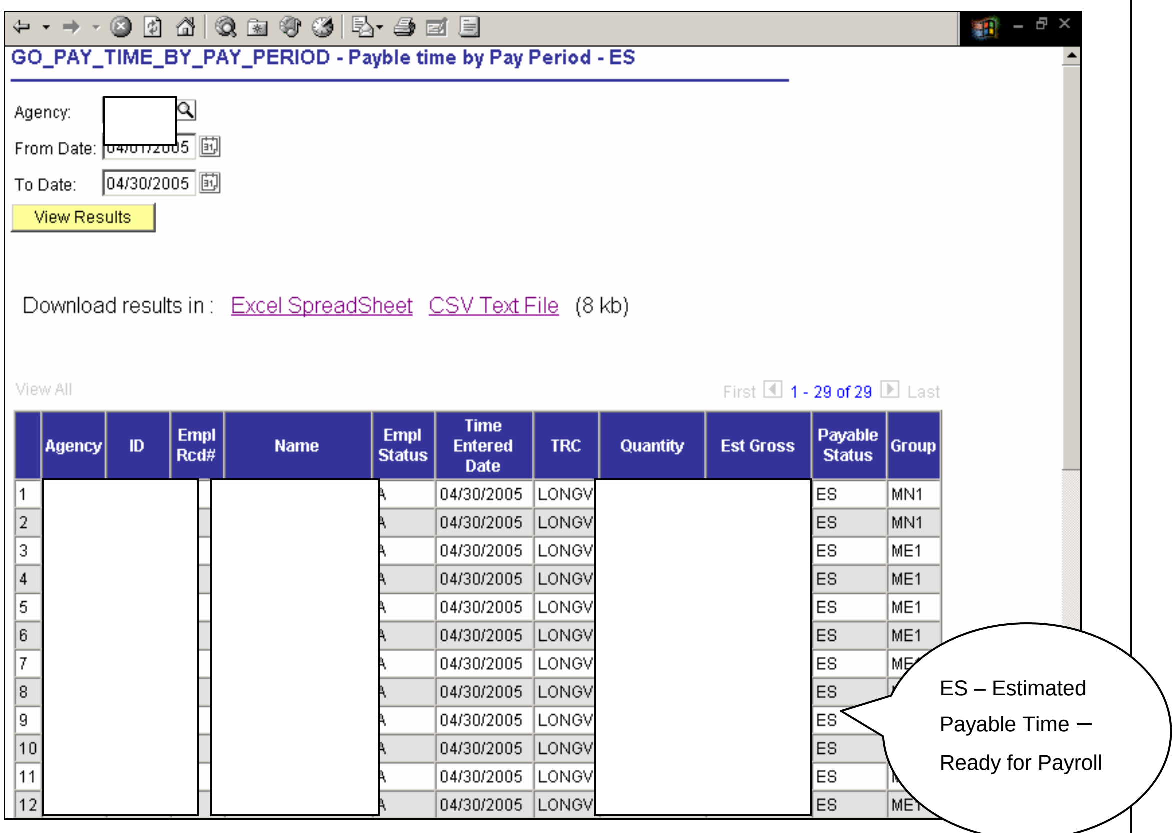
STEP 4 - *GO_PAY_TIME_BY_PAY_PERIOD*

PeopleTools > Query Manager > Use > Query Manager > in the box where the cursor is blinking enter ***GO_PAY_TIME_BY_PAY_PERIOD*** and click Search.

Click on ***Run***

The prompt asks for Agency – enter your 3 digit agency number and date range

Click on ***View Results***



ADJUST PAID TIME

CLOSING REJECTED ROWS

As we know, time is entered into Weekly Elapsed Time, the Time Administration batch job is run, and Payable Time is produced with a Payable Status of ES – Estimated, Ready for Payroll. If changes need to be made before the data is loaded to Payroll, it can be changed in the Weekly Elapsed Time page, re-run Time Administration, and the Payable Time row will be updated.

If the status of the Payable Time row is Closed, Sent to Payroll, Taken by Payroll or Rejected by Payroll, Time Administration will create an off-setting entry in Payable Time if the original time is modified through the Weekly Elapsed Time page.

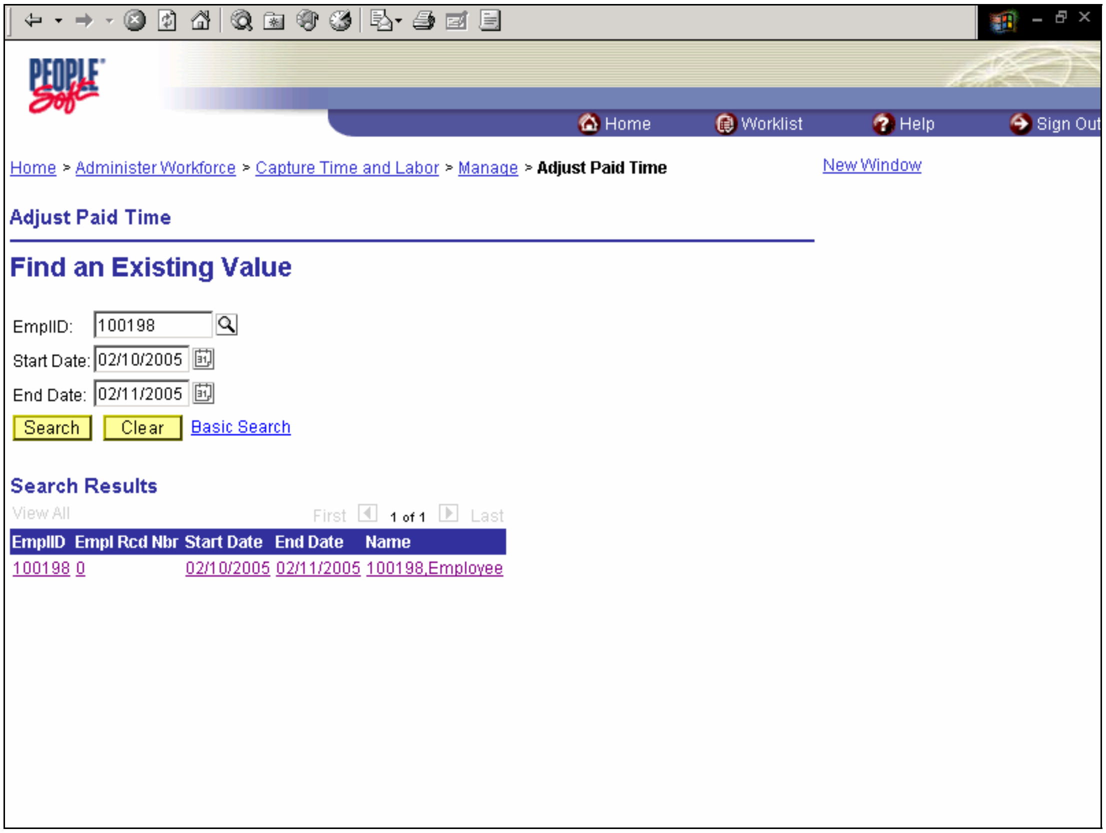
Closing Rejected Rows:

If the Payable Time status is Rejected by Payroll, those rows of data can be closed.

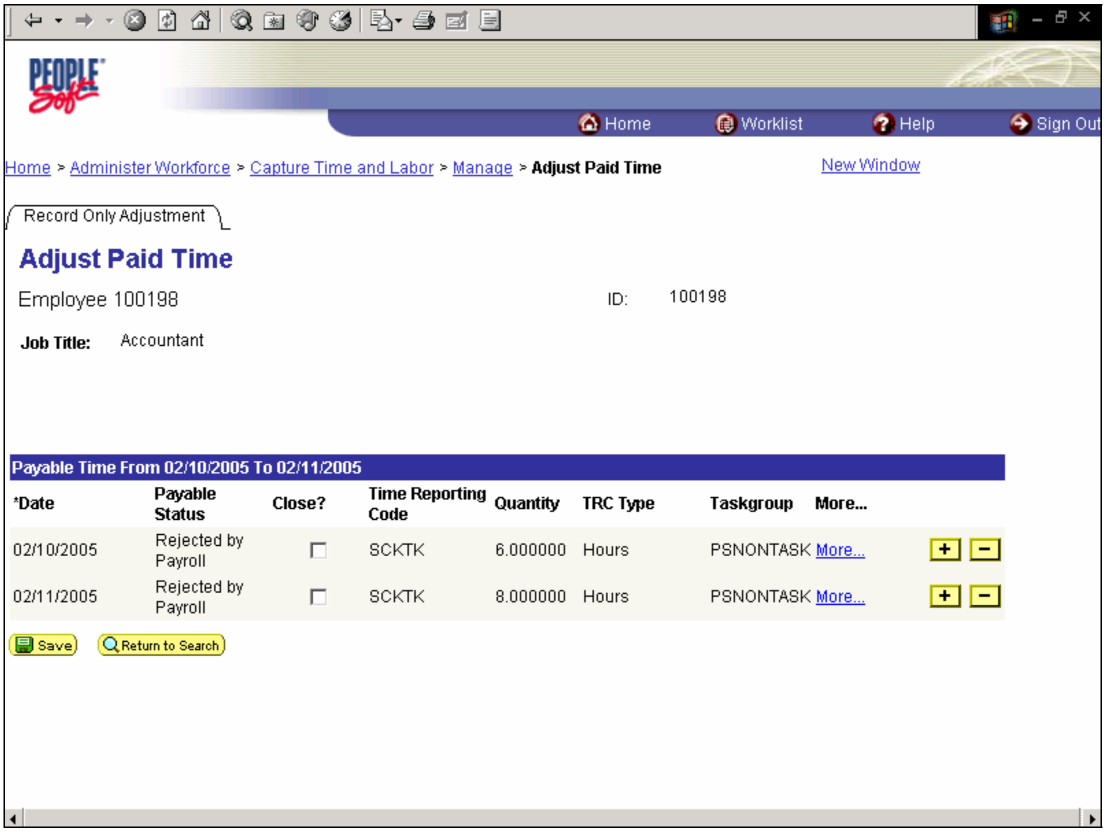
To close Rejected rows, navigate to the Adjust Paid Time Page.

Home > Administer Workforce > Capture Time and Labor > Manage > Adjust Paid Time

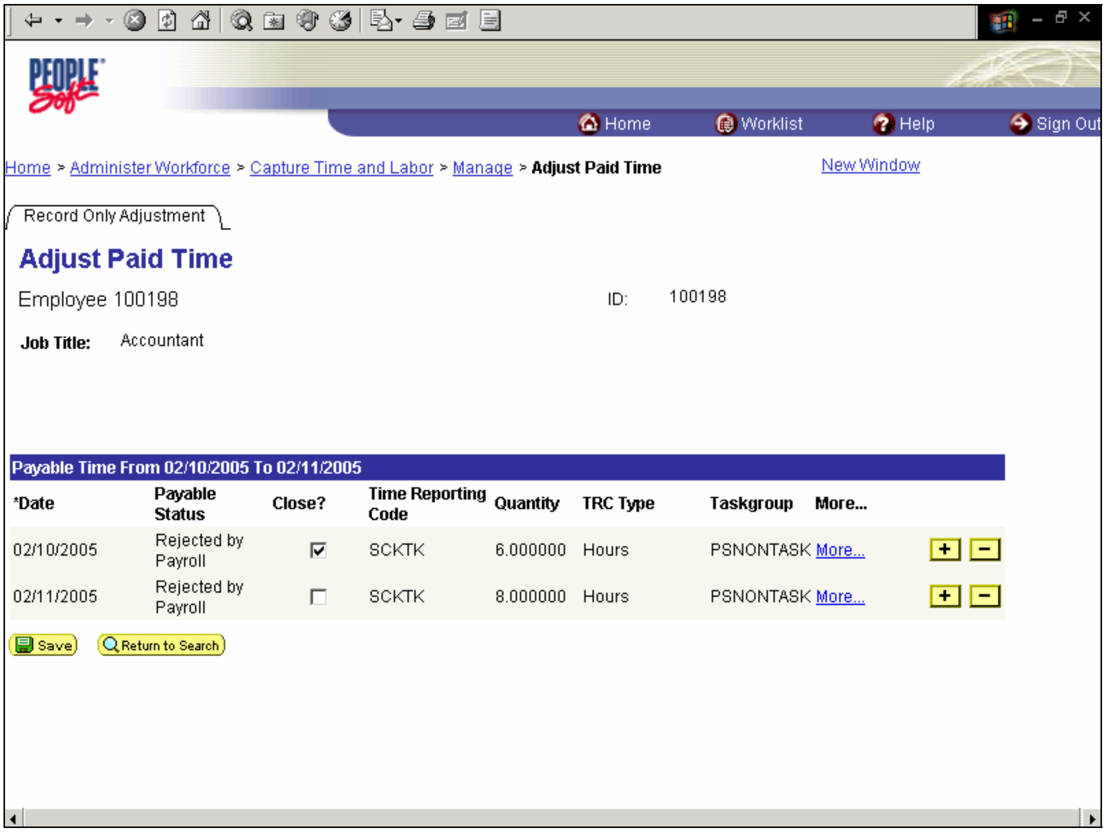
Enter the Employee ID, start date and end date then click Search.



This will display the Payable Time Rows.



Click the 'Close?' checkbox for the row(s) you want to close and click the Save button.



The entry will disappear from this screen after you click save. However, it will continue to show on the Payable Time Detail Screen. The Payable Time Detail Screen does not show the status of each line so you cannot tell from looking at that screen that you have closed the transaction.

Closing the time will stop the system from attempting to send it to Payroll every time that Payroll pulls transactions or Time and Labor loads transactions. If it cannot load to payroll, the system produces Payroll Error Messages.

NOTE: The Payable Status can be checked by using the Payable Time Detail Page. Any row with an RP – Rejected by Payroll status would be reloaded into Payroll provided the employee is within the Paygroup and the date of the Payable Time is less than or equal to the Pay End Date. However, with this functionality there is no way of knowing through an inquiry page, if the Rejected rows will be loaded to payroll, since those that were closed through the Adjust Paid Time page will not be.

PROCESSING ADJUSTMENTS THRU T & L

All adjustments are made through the weekly elapsed time page. Use the appropriate adjustment code. When entering the value (hours or amounts) for the TRC, a positive amount will pay or add to leave balances. A negative number will need to be entered to reduce pay or leave balances. This is different then entering leave time taken because the TRCs for taking time off are configured to subtract from the appropriate balances when a positive value is used on weekly elapsed time. However, adjustments are configured to add to the balances if the number is positive.

TRCs for Adjustments

TRC	Descr	TRC Type	*Earn Code*	Comp Leave Ind	Add to Gross
ANNAD	Annual Leave Adjustment	Hours	*ANA*	NO	N
				CER	
ADLAD	Admin Lv Cool Off Adjustment	H		N	Y
ADJ	Earnings Adjustments	H	ADJ	NO	Y
CADJ	Comp Rate Adj (Mid Week)	H	CAJ	NO	Y
				CER	
CTEAD	Comp Time Earn Adjustment	H		N	Y
				CER	
ENFAD	Enforced Leave Adjustment	H		N	Y
EQUIT	Equity Based Pay Adjustment	A	EBP	NO	Y
				CER	
HOLAD	Holiday Leave Adjustment	H		N	Y
LATXF	Lateral Transfer Adjustment	A	LAT	NO	Y
				CER	
MILAD	Military Leave Adjustment	H		N	Y
				CER	
ORGAD	Organizational Leave Adjustmen	H		N	Y
RADJ	Retro Pay Adjustment	A	RAJ	NO	Y
				CER	
SHLAD	Shared Leave Adjustment	H		N	Y
				CER	
SHLNA	Shared Leave Non-Term Adjust	H		N	Y
				CER	
SHLTA	Shared Leave - Term ILL Adjust	H		N	Y
SICAD	Sick Hours Adjustment	H	SCA	NO	N