

OTL - How to Implement and Use Oracle Time and Labor Functionalities for Project Transactions Only

Suzana Ferrari
DARC Corporation

Presentation Agenda

- Introduction
- OTL Time Entry Overview
- OTL Concepts, Terms and Key Functionalities
- OTL Setup Steps – Project Time Entries
- OTL and OIT – Major Differences
- Conclusion
- Q&A

Introduction

- OTL Replaces OIT
- E-Business Suite Time Management Application
- Part of Oracle Human Resources Management System (HRMS)
- Metalink Note 282357.1
 - As of 31-OCT-2004 all platforms of Oracle Internet Time (OIT) Product Version(s) 11.5.1 & higher, are desupported

OTL Time Entry Overview

- Labor – Employers' Costly Expense
- Intuitive Self Service Web Page
- Timecard Layouts
- Off Line Functionalities
- Line Manager and Timekeeper Functionalities
- Timecard API

Time Entry

ORACLE Time

[Diagnostics](#) [Home](#) [Logout](#) [Pr](#)

[Time Entry](#) | [Timecard Search](#) | [Templates](#) | [Create Timecard](#)

Time Entry: Marlin, Ms. Amy, 34

[Cancel](#) [Save](#)

Period: [Go](#) Comments:

Overriding Approver:

Template: Overwrite [Go](#)

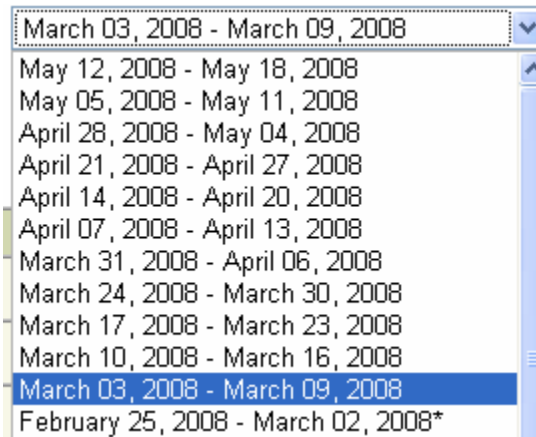
Project	Task	Type	Mon, Feb 25	Tue, Feb 26	Wed, Feb 27	Thu, Feb 28	Fri, Feb 29	Sat, Mar 01	Sun, Mar 02	Total	Del
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
<input type="button" value="Add Another Row"/> <input type="button" value="Calculate"/>			0	0	0	0	0	0	0	0	

Template Name:

[Cancel](#) [Save](#)

Time Entry Periods

- OTL does not allow duplicate timecard entry
 - Periods for which timecards have been entered are identified with asterisk



OTL Concepts, Terms and Key Functionalities

- Timecard Configuration
 - Configure the predefined layouts
- Template
 - Reduce entry errors and provide a faster timecard entry
- Contingent Worker
 - Contingent worker uses PO timecard layout

OTL Concepts, Terms and Key Functionalities

- Retrieval Rules
 - Which approval process must complete prior to application retrieving data?
- Application Set
 - Various application sets available
- Time Entry Rules
 - Validate data against defined rules

OTL Concepts, Terms and Key Functionalities

- Approvals
 - Workflow based - approve, reject or request more information
- Approval Styles
 - Who is approving workers' timecards?
- Change and Late Audit (CLA)
 - Assist with audit standards, and to provide audit trail

OTL Concepts, Terms and Key Functionalities

- Preferences
 - Define how workers can use the application
- Eligibility Criteria
 - Eligibility rules assign preferences to workers
- Time Store
 - Central repository
 - ‘Gatekeeper’ of timecard data

OTL Concepts, Terms and Key Functionalities

- Line Manager
 - Web based
 - People in Hierarchy

[Time Entry: People in My List](#) >

Time Entry: People in Hierarchy

Focus	Name	Assignment Number	Job	Department	Action
	▼ Amy Marlin				
	Austin Sanders	230	ENG400.ENGINEER	Engineering R+D	
	Eric Foreman	1194	ENG400.ENGINEER	Engineering R+D	
	Francis Scott	928	ENG400.ENGINEER	Services-West	
	James Cameron	927	TRN500.TRAINER	Services-Central	
	Jamie North	926	ANA400.ANALYST	Services-South	

OTL Concepts, Terms and Key Functionalities

- Line Manager
 - Web based
 - Add to My List

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

- Search results where each must contain all values entered.
- Search results where each may contain any value entered.

First Name

Last Name

Assignment Number

Job

Select Person:

Select All | Select None

Select	Name	Assignment Number	Job People	Department	Action
<input type="checkbox"/>	Abraham Feinstein	1047	ANA400.ANALYST	Vision Corporation	
<input type="checkbox"/>	Adam Faulkner	378-78-7890	0343	Payroll Operations	
<input type="checkbox"/>	Alberto Ferrario	6		Vision Italy	
<input type="checkbox"/>	Allison Frost	13	Secretary	Vision Australia	
<input type="checkbox"/>	Amy Feng	508		Vision Corporation	




OTL Concepts, Terms and Key Functionalities

- Line Manager
 - Web based
 - People in My List

Time Entry: People in My List

Select Person:

[Select All](#) | [Select None](#)

Select	Name 	Assignment Number	Job	Department	Action
<input type="checkbox"/>	Abraham Feinstein	1047	ANA400.ANALYST	Vision Corporation	
<input type="checkbox"/>	Amy Feng	508		Vision Corporation	

OTL Concepts, Terms and Key Functionalities

- Timekeeper
 - Form based

The screenshot shows a web-based form titled "Timekeeper Group". At the top, there are two input fields: "Name" with the value "OAUG_08 Group" and "Timekeeper" with the value "Marlin, Ms. Amy". Below these is a section titled "Populate Person" containing an "Add" dropdown menu set to "Assignment Set", an empty input field, a "Filter by" dropdown menu, and a "Go" button. The main part of the form is a table with the following data:

Name	Number	Type	Timecard Period
Adams, Ms. Janice	102	Employee	Weekly - Starts Monday
Albiero, Ms. Nancy	116	Employee	Weekly - Starts Monday
Baker, Ms. Catherine	48	Employee	Weekly - Starts Monday
Capriotti, Ms. Melanie	29	Employee	Weekly - Starts Monday
Daley, Mrs. Mary	2	Employee	Weekly - Starts Monday
Fiorina, Ms. Mary	114	Employee	Weekly - Starts Monday
Gable, Ms. Pamela	77	Employee	Weekly - Starts Monday

OTL Concepts, Terms and Key Functionalities

- Transaction Controls
 - Entries are validated by transaction controls in Projects
- Valid Projects and Tasks
 - List of valid projects and tasks can be downloaded to be used when creating a timecard off line

OTL Concepts, Terms and Key Functionalities

- Alternate Names
 - Flexibility to define user friendly names, and to restrict the lost of values
- Integration
 - Projects, HR, Internet Expenses, Project Resource Management, Payroll, Procurement, and Enterprise Asset Management

OTL Setup Steps – Projects

- OTL 1 Replace the Default Oracle Logo
- OTL 2 Set Up Sysadmin ID
- OTL 3 Set Up Workflow Background Process
 - Minimum Threshold: blank
 - Maximum Threshold: blank
 - Process Deferred: Yes
 - Process Timeout: Yes
 - Process Stuck: Yes

OTL 3 Set Up Workflow Background Process

Submit Request

Run this Request...

Name: **Workflow Background Process**

Parameters: [Empty]

Language: **American English**

At these Times...

Run the Job: **As Scheduled**

Upon Completion...

Save

Notify: [Empty]

Print to: **noprint**

Help (H)

Parameters

Item Type: **OTL Workflows for Employees**

Minimum Threshold: [Empty]

Maximum Threshold: [Empty]

Process Deferred: **Yes**

Process Timeout: **Yes**

Process Stuck: **Yes**

OK Cancel

OTL 3 Set Up Workflow Background Process

Schedule

Apply a Saved Schedule...

Run the Job...

- As Soon as Possible
- Once
- Periodically
- On Specific Days
- Advanced

Start At

End At

Leave End Date blank to run indefinitely

Re-run every

Apply the Interval...

- From the Start of the prior run
- From the Completion of the prior run

Increment date parameters each run

Save this schedule

Help OK Cancel

OTL Setup Steps – Projects

- OTL 4 Define Menus
- OTL 5 Disable the Multiple Windows Feature
- OTL 6 Define Report Security Groups
- OTL 7 Create Responsibilities
- OTL 8 Create Users Step
- OTL 9 Configure Batch Creation of User Accounts

OTL Setup Steps – Projects

- OTL10 Set User Profile Options
- OTL11 Define Flexfield Value Sets
- OTL12 Unprotect the OTL Formulas Descriptive Flexfield
- OTL13 Define Descriptive Flexfield Segments
- OTL14 Define Flexfield Segment Values
- OTL15 Protect the OTL Formulas Descriptive Flexfield

OTL Setup Steps – Projects

- OTL16 Write Formulas for Time Entry and Approval Rules
- OTL17 Define Recurring Time Periods
- OTL18 Define Approval Periods
- OTL19 Define Retrieval Rules
- OTL20 Define Retrieval Rule Groups
- OTL21 Define Time Categories
- OTL22 Define Time Entry Rules

OTL 17 Define Recurring Time Periods

Name	Period Type	Duration In Days	Start Date
Weekly - Starts Monday	Week		03-JAN-2000

OTL 18 Define Approval Periods

Approval Periods

Name **Projects Only**

Approval Period Details

Application	Recurring Period
Projects	Weekly - Starts Monday

OTL 19 And OTL 20

- OTL19 Define Retrieval Rules

Retrieval Rules

Retrieval Rule Name: **Projects**

Retrieval Process Name: **Projects Retrieval Process**

Retrieve on the following approval status

Application	Status
Projects	Approved

- OTL20 Define Retrieval Rule Groups

Retrieval Rule Groups

Name: **Projects Retrieval Rule Group**

Retrieval Rules

Name	Retrieval Process
Projects	Projects Retrieval Process

OTL 22 Define Time Entry Rules

			Formula Inputs		Date		
Name	Description	Usage	Formula	Mapping	From	To	Global
Change Rule		Submission / F	CLA Change (Seeded)		01-JAN-1951		<input checked="" type="checkbox"/>
Exceeded Vacation	Exceeded Vacation	Submission / F	PTO Accrual Balance	W	01-JAN-2000		<input checked="" type="checkbox"/>
Exceeds Vacation	Exceeds Vacation	Submission / F	PTO Accrual Balance	W	01-JAN-2000		<input checked="" type="checkbox"/>
HR Level Process		Submission / F	Entry Level Process	H	01-JAN-1951		<input checked="" type="checkbox"/>
IE Mthly Overtime	IE Monthly Payroll	Submission / F		BEE Retrieval Process	01-JAN-1990		<input checked="" type="checkbox"/>
Late Rule		Submission / F	CLA Late (Seeded)	.2	01-JAN-1951		<input checked="" type="checkbox"/>
More than 24 hrs	More than 24 hrs in	Submission / F	Seeded formula for	Or	01-JAN-2000		<input checked="" type="checkbox"/>
Overlapping Time	Seeded Overlapping	Submission / F		OTL Deposit Process	01-JAN-1951		<input checked="" type="checkbox"/>
Overlapping Time	Seeded Overlapping	Save		OTL Deposit Process	01-JAN-1951		<input checked="" type="checkbox"/>
Payroll Data Approval	Payroll Data Approval	Submission / F		BEE Retrieval Process	01-JAN-1951		<input checked="" type="checkbox"/>

OTL 22 Define Time Entry Rules

The screenshot displays the 'Time Entry Rules' window. It contains a table with the following data:

Name	Description	Usage	Formula	Mapping	From	To	Global
Late Rule		Submission / F	CLA Late (Seeded	.2	01-JAN-1951		<input checked="" type="checkbox"/>

An 'OTL Formulas' dialog box is open over the table, containing the following fields:

- Time Category:
- Start-Stop Late Hours:
- Quantity Late Hours:

Buttons at the bottom of the dialog include: OK, Cancel, Clear, and Help.

OTL Setup Steps – Projects

- OTL23 Define Time Entry Rule Groups
- OTL24 Define Approval Workflow
- OTL25 Define Approval Styles
- OTL26 Run Generate Flexfield and Mapping Information
- OTL27 Review OTL Information Types FlexField Segments
- OTL28 Define Mapping Components

OTL 23 Define Time Entry Rule Groups

- Change and Late Audit

Time Entry Rule Groups

Name **Change and Late Audit**

Time Entry Rules

Name	Usage	Formula	Mapping	Date		Outcome
				From	To	
Late Rule	Submis	CLA Late (See		01-JAN-1951		Reason
Change Rule	Submis	CLA Change (\$		01-JAN-1951		Reason

HXC_LATE_AUDIT_REASONS

Application Utilities Lookups

Type: **HXC_LATE_AUDIT_REASONS**

Meaning: **OTL Late Audit Reason**

Application: **Time and Labor Engine**

Description: **OTL Late Audit Reason**

Access Level:
 User
 Extensible
 System

Effective Dates

Code	Meaning	Description	Tag	From	To	Enable
EMERGENCY	Emergency	Called away on an en		01-JAN-2000		<input checked="" type="checkbox"/>
FORGOT	Forgot	No excuse, just forgot		01-JAN-2000		<input checked="" type="checkbox"/>
OUT SICK	Out Sick	Not in office to enter ti		01-JAN-2000		<input checked="" type="checkbox"/>
OAUG_08	On Conference	On Conference		26-FEB-2008		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

HXC_CHANGE_AUDIT_REASONS

Application Utilities Lookups

Type: **HXC_CHANGE_AUDIT_REASONS**

Meaning: **OTL Change Audit Reasons**

Application: **Time and Labor Engine**

Description: **OTL Change Audit Reasons**

Access Level:
 User
 Extensible
 System

Effective Dates: _____ Enabled

Code	Meaning	Description	Tag	From	To	Enabled
DATE	Entered Wrong Date	Changing date becaus		01-JAN-2000		<input checked="" type="checkbox"/>
EXP TYPE	Entered Wrong Expe	Changing the expendi		01-JAN-2000		<input checked="" type="checkbox"/>
HOURS	Entreded Wrong Hou	Changing hours becat		01-JAN-2000		<input checked="" type="checkbox"/>
PROJECT NU	Entered Wrong Proje	Changing project num		01-JAN-2000		<input checked="" type="checkbox"/>
TASK NUMBE	Entered Wrong Task	Changing task numbe		01-JAN-2000		<input checked="" type="checkbox"/>
NEW HOURS	NEW HOURS ADDED	NEW HOURS ADDED		26-FEB-2008		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

OTL 25 Define Approval Styles

Approval Style

Name: **OAUG_08 Approval**

Description:

Data Interdependency Rules

Rule	Application
Projects Data Approval Rule	Projects

Approval Style Components

Application	Sequence	Type	Identifier	Date	
				From	To
Projects	10	HR Supervisor		26-FEB-2008	

OTL 25 Define Approval Styles

- Delivered

Approval Style

Name **OTL Auto Approve**

Description **OTL Auto Approve**

Data Interdependency Rules

Rule	Application
Payroll Data Approval Rule	Payroll
Projects Data Approval Rule	Projects

Approval Style Components

Application	Sequence	Type	Identifier	Date	
				From	To
Payroll	10	Auto Approve		01-JAN-1900	
Projects	10	Auto Approve		01-JAN-1900	
Human Resources	10	Auto Approve		01-JAN-1900	
Enterprise Asset Ma	10	Auto Approve		01-JAN-1900	

OTL Setup Steps – Projects

- OTL29 Define Mapping
- OTL30 Define Retrieval Process
- OTL31 Define Timecard Layouts
- OTL32 Define Alternate Names
- OTL33 Define and Enable Templates
- OTL34 Define Preferences
- OTL35 Configure Instructions and Tips

OTL 34 Define Preferences

- Create Preference Tree
- Create Custom Branches
- Define sub-branches for each section
- Add preferences and preference values to sub-branches

OTL 34 Define Preferences

Preferences | Eligibility Criteria | People

Preference Tree

- Change And Late Audit (Cla)
- Default Preferences
- Default Preferences - Eam
- Default Preferences - Projects
- Default Preferences - Purchasing
- Exempt
- Oaug_08 Project Preference Tree**
 - Oaug_08 Change And Late Audi
 - Oaug_08 Self Service
 - Oaug_08 Time Store
 - Oaug_08 Timekeeper
- Vhs Biweekly

Name in Tree

OAUG_08 Project Preference Tree

Preference

Preference Values

Editable by user? Displayed to user?

Rules

Rule Name	Link by	Linked to	Precedence
OAUG_08_02	Organization	Vision Health S	25
OAUG_08_01	All People		30

OTL 34 Define Preferences

Preferences Eligibility Criteria People

Preference Tree

- Change And Late Audit (Cla)
- Default Preferences
- Default Preferences - Eam
- Default Preferences - Projects
- Default Preferences - Purchasing
- Exempt
- Oaug_08 Project Preference Tree
 - Oaug_08 Change And Late Audit
 - Oaug_08 Cla Delete Timecards**
 - Oaug_08 Cla Layouts
 - Oaug_08 Cla Process Flow
 - Oaug_08 Cla Rule Group
 - Oaug_08 Self Service
 - Oaug_08 Time Store

Name in Tree
OAUG_08 CLA Delete Timecards

Preference
Timecard Delete Allowed

Preference Values **No**

Editable by user? Displayed to user?

Rules

Rule Name	Link by	Linked to	Precedence

OTL 34 Define Preferences

Branch	Sub-Branch	Preference	Value
OAUG_08 Self Service>OAUG_08 Worker	OAUG_08 Append Templates on Timecard	Self Service functionality to append templates on the timecard	Yes
	OAUG_08 Enter Negative Hours	Self-Service ability to enter negative hours	Yes
	OAUG_08 Number of Empty rows on Timecard	Self-Service number of empty rows on the timecard	3
	OAUG_08 Save As Template on Timecard	Self-Service save as template functionality on timecard	Yes
	OAUG_08 Timecard Delete Allowed	Timecard Delete Allowed	No
	OAUG_08 Timecard Layout	Self-Service timecard, review and confirmation layout pages for a worker	Projects – for all

OTL 34 Define Preferences

Branch	Sub-Branch	Preference	Value
OAUG_08 Time Store	OAUG_08 Application Set	Time Store Application Set	Projects
	OAUG_08 Approval Periods	Time Store Approval Periods	Projects Only
	OAUG_08 Approval Style	Time Store Approval Style	OAUG_08 Approval
	OAUG_08 Auditing Requirements	Time Store Audit Requirements	Change and Late Audit
	OAUG_08 Entry Level Processing Rule Groups	Time Store Entry Level Processing Rules	
	OAUG_08 Retrieval Rule Groups	Time Store Retrieval Rule Groups	Projects Retrieval Rule Group

OTL 34 Define Preferences

- Eligibility Criteria
 - Assigning Preferences

Eligibility Criteria Type

All People

Area Code (AK)

Assignment

Corporate Officer Code (WY)

Corporate Officer Indicator

Government Reporting Entity

Job

Legal Representative

Level

Location

Occupational Code (AK)

Organization

Organization Hierarchy

Payroll

Person

Person Type

Position

Probationary Code (MO)

Reporting Establishment

Responsibility

OTL and OIT – Major Differences

Setting Up Self Service Time	Corresponding OTL Setup Steps
Setting Up Responsibilities and Automatic Approval	Create Responsibilities Define Approval Periods Define Approval Styles Assign Preferences relating to Approval
Assign Users the Authority to Enter Timecards for Other Employees - authorized delegate.	Timekeeper Profile and Preferences Setup Or Line Manager Functionality
ICX: Date Format Mask	A preference called 'Date Format' is delivered to control the date formats in the self-service timecard.
ICX: Language	Language is not a specific OTL setting It is set in the Oracle Application Framework settings.
ICX: Limit Connect	Limit Connect is not an OTL setting. It is set in the Oracle Applications Framework.
ICX: Limit Session Time	Limit Session Time is not an OTL setting. It is set in the Oracle Applications Framework.
PA: Override Approver	Preference 'Enter Override Approver'
PA Time: Allow Entry of Negative Hours	Preference 'Enter Negative Hours'

OTL and OIT – Major Differences

Setting Up Self Service Time	Corresponding OTL Setup Steps
PA Time: Timecard Number Prefix	Timecard Number Prefix is not available in OTL.
PA Time: Enable Business Message	Time Entry Rules There are no Business Messages delivered with OTL.
PA: AutoApprove Timesheets	Auto Approve is the default Approval Style for OTL. PA: AutoApprove Timesheets profile option should be set as appropriate in Projects.
PA Time: Licensed	Not applicable in OTL.
Setting the Week Ending Day	Define Recurring Time Periods and assign the value to appropriate preference
Setting Up the Spreadsheet for Offline Entry	Disconnected Entry Preference
Transaction Import – Transaction Source: Oracle Self Service Time	Transaction Import – Transaction Source: Oracle Time and Labor
Custom trigger to prevent duplicate timecard	OTL does not allow duplicate timecard entry. Periods for which timecards have been entered are identified with asterisk.

Conclusion

- OTL features web based time entry, online and offline time entry, multiple templates with different layouts, contingent worker support, timekeeper and line manager functionalities.
- Timecards are stored in a central repository
- OTL preferences and eligibility definitions determine how the application is used, and by whom

Q&A

Thank You!