

HCM: Local Configuration Guide - Absence Management

This document contains the configuration decisions made for use in deployment of the Absence Management of the Oracle's PeopleSoft HCM 9.2 application. As such, all additional documentation must be in agreement with the related items described herein. Should conflict arise with information contained in another document, the data in this document shall be considered valid and that of the other shall be deemed incorrect.

The order of the configuration tables presented in this document adheres to the table setup sequence required to successfully set up all tables.

Absence Management handles absence processing and enables you to fine-tune the design of your system. Using a browser environment, PeopleTools, and a rules-based system, you can configure your absence system online without writing or changing the source code, thus reducing installation and maintenance time and costs. Absence Management contains no application-specific rules or code. Using items, called elements, you build rules that determine what absence components are calculated, on a payee-by-payee basis, during batch processing.

This guide contains a brief description of any issues and /or recommended approaches for the table setups. In addition to this documentation, please refer to the appropriate sections in PeopleBooks for additional details for configuring and maintaining the HCM product

Payroll User (Enterprise)

Define operator profile to access countries for Global Payroll and Absence. Global Payroll security is set at the user level in order to access element setup data. Select the "All

Countries" value in the Used By edit box/drop down list. Only those user profiles who will be configuring absence management should have access to element setup data.

Cut-over task at go-live

Global Payroll User Profile

User ID

Session Default

*Used By

*Country

Allow PS Element Change

Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Navigation: NavBar > Navigator > Set Up HCM > Security > User Maintenance > Global Payroll User Profile

Security:

- ZZ Payroll Configuration

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_OPR_RULE_PRF

Page: GP_OPR_RULE_PRF

Action: A/UD

Absence Entitlements (District)

Define calculation rules, accumulators, and overrides for absence entitlements.

[Absence Entitlement Name](#) | [Calculation](#) | [Rounding/Proration](#) | [Auto Generated Accumulators](#) | [Supporting Element Overrides](#)

*Name
 *Description
 *Definition As Of Date

Element Type
 *Field Format
 Element Nbr Always Recalculate

Element Use
 *Owner
 *Class
 *Used By
 Country
 Industry/Region
 Category

Override Levels
 Pay Entity Via Elements
 Pay Group Element Definition
 Payee Positive Input
 Calendar

Results
 Store
 Store if Zero

Resolution Parameters
 This element type does not require additional resolution parameters.

Version Information
 Last Updated
 Last Updated By
 User Version
 Version

[Custom Fields](#) | [Comments](#) | [Forecasting](#)

[Absence Entitlement Name](#) | [Calculation](#) | [Rounding/Proration](#) | [Auto Generated Accumulators](#) | [Supporting Element Overrides](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Absence Elements > Absence Entitlements

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ABS_ENTL

Page: GP_PIN

Action: A/UD/DA/C

Absence Takes (District)

Define absence take parameters.

Absence Take Name | Calculation | Day Formula | Period | Negative Balances | Priority | Forecasting | Balance Inquiry | >

*Name
 *Description
 *Definition As Of Date: Calendar Period End Date

Element Type: Absence Take
 *Field Format Short Name: N/A
 Element Nbr: 99999999 Always Recalculate

Element Use

*Owner: Customer Maintained
 *Class: Not Classified
 *Used By:
 Country:
 Industry/Region:
 Category:

Override Levels

Pay Entity Via Elements
 Pay Group Element Definition
 Payee Positive Input
 Calendar

Results

Store
 Store if Zero

Resolution Parameters

This element type does not require additional resolution parameters.

Version Information

Last Updated
 Last Updated By
 User Version
 Version

Custom Fields | Comments | Forecasting

Save | Notify | Add | Update/Display | Include History | Correct History

Absence Take Name | Calculation | Day Formula | Period | Negative Balances | Priority | Forecasting | Balance Inquiry | User Defined Result Fields | Supporting Element Overrides

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Absence Elements > Absence Takes

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ABS_TAKE

Page: GP_ELM_DFN_SOVR

Action: A/UD/DA/C

Accumulators (District)

Define accumulator period, levels, and members.

Accumulator Name

Definition

Level

Members

*Name

*Description

Element Type Accumulator

*Field Format Monetary

Element Nbr 99999999 Always Recalculate

Element Use

*Owner Customer Maintained

*Class Not Classified

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Resolution Parameters

This element type does not require additional resolution parameters.

Results

Store Store if Zero

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields Comments

Accumulator Name | Definition | Level | Members

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Supporting Elements > Accumulators

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ACCUMULATOR

Page: GP_PIN

Action: A/UD

Brackets (District)

Define lookup rules; search keys/return columns and data for a bracket.

Bracket Name | Lookup Rules | Search Keys/Return Columns | Data

*Name

*Description

*Definition As Of Date

Element Type

*Field Format

Element Nbr Always Recalculate

Element Use

*Owner

*Class

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Results

Store Store if Zero

Resolution Parameters

This element type does not require additional resolution parameters.

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields | Comments

Bracket Name | Lookup Rules | Search Keys/Return Columns | Data

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Supporting Elements > Brackets

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_BRACKET

Page: GP_PIN

Action: A/UD/DA

Formulas (District)

Define a formula element using mathematical and logical operands.

Formula Name

Field-by-Field Definition

Text Definition

*Name

*Description

*Definition As Of Date

Element Type

*Field Format

Element Nbr Always Recalculate

Element Use

*Owner

*Class

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Resolution Parameters

This element type does not require additional resolution parameters.

Results

Store

Store if Zero

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields

Comments

Formula Name | [Field-by-Field Definition](#) | [Text Definition](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Supporting Elements > Formulas

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_FORMULA

Page: GP_PIN

Action: A/UD/DA/C

Proration Rules (District)

Define a proration element providing the numerator and denominator designation. Generic Global proration is used. GEN PO COUNT - Prorate Based on Work Hours.

Proration Name
Definition

*Name

*Description

*Definition As Of Date

Element Type

*Field Format

Element Nbr Always Recalculate

Element Use

*Owner

*Class

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Resolution Parameters

This element type does not require additional resolution parameters.

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields

Comments

Proration Name | Definition

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Supporting Elements > Proration Rules

Security: Under Development

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_PRORATION

Page: GP_PRORATION

Action: A/UD/DA/C

Pay Entities (District)

Define the organization responsible for making payments to payees.

Pay Entity Address
Processing Details
Retro Limits
Supporting Element Overrides
Source Bank Link

Pay Entity

*Description

Short Description

Definition Q | << < 1 of 1 > >> | View All

*Effective Date

Country United States

Address

*Status

Save
Notify
Add
Update/Display
Include History
Correct History

Pay Entity Address | Processing Details | Retro Limits | Supporting Element Overrides | Source Bank Link

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Organizational > Pay Entities

Security:

- ZD Absence Mgmt Local Config
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_PYENT

Page: GP_PYENT_NAME

Action: A/UD/DA/C

Pay Groups (District)

Categorize payees sharing the same pay characteristics into pay groups.

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Organizational > Pay Groups

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_PYGRP

Page: GP_PYGRP_NAME

Action: UD/DA

Eligibility Groups (District)

Define eligibility groups for which a payee population might be eligible.

Eligibility Groups

Eligibility Group [redacted]

Definition Q | << < 1 of 1 > >>

*Effective Date [calendar icon] *Status Active [dropdown] [+ -]

*Description [text input] Short Description [text input]

Eligibility Group Members Q | << < 1-3 of 3 > >> | View All

*Element Name	Description		
[input] Q	[redacted]	[+]	[-]
[input] Q	[redacted]	[+]	[-]
[input] Q	[redacted]	[+]	[-]

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Organizational > Eligibility Groups

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ELIG_GROUP

Page: GP_ELIG_GROUP

Action: A/UD/DA/C

Element Groups (District)

Define groups of elements to be used with various types of processing.

Element Group Name
Element Group Members

*Name

*Description

*Definition As Of Date

Element Type

*Field Format Short Name

Element Nbr Always Recalculate

Element Use

*Owner

*Class

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Resolution Parameters

This element type does not require additional resolution parameters.

Results

Store

Store if Zero

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields Comments

Element Group Name | [Element Group Members](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Elements > Element Groups

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ELEMENT_GROUP

Page: GP_PIN

Action: A/UD/DA/C

Sections (District)

Group and order elements into sections for payroll or absence processing.

Section Name

Definition

*Name

*Description

*Definition As Of Date

Element Type

*Field Format Short Name

Element Nbr Always Recalculate

Element Use

*Owner

*Class

*Used By

Country

Industry/Region

Category

Override Levels

Pay Entity Via Elements

Pay Group Element Definition

Payee Positive Input

Calendar

Resolution Parameters

This element type does not require additional resolution parameters.

Results

Store

Store if Zero

Version Information

Last Updated

Last Updated By

User Version

Version

Custom Fields

Comments

Section Name | [Definition](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Processing > Sections

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_SECTION

Page: GP_PIN

Action: A/UD/DA/C

Process Lists (District)

Define process lists with sections, pay accumulators, and calculation type.

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Processing > Process Lists

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_PROCESS

Page: GP_PIN

Action: A/UD/DA/C

Run Types (District)

Define a run type for a payroll or absence run; associate TRCs and VC earnings.

Run Types

Run Type Name: 010 CONV
 *Description: 010 Conversion
 Short Description: 010 Conver
 *Calculation Type: Absence Calculation
 Allow Duplicates

Retro Adjustment Sources

1-1 of 1 | View All

Run Type Name	Description		
		+	-

Definition

1 of 1 | View All

Effective Date: 01/01/1990 *Status: Active
 *Process Name: 010 ENT PL 010 Entitlement Monthly
 Process Retro Triggers

Time & Labor TRCs

1-1 of 1 | View All

Time Reporting Code	Description		
		+	-

Variable Compensation Awards

1-1 of 1 | View All

*Earnings	Description		
		+	-

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Processing > Run Types

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_RUN_TYPE

Page: GP_RUN_TYPE

Action: A/UD/DA/C

Periods (District)

Define period parameters like begin and end.

Periods

Period ID 17014M01

*Description 17014M01 Monthly

Short Description 17014M01

*Period Begin Date 01/01/2014 

*Period End Date 01/31/2014 

*Frequency M  Monthly

Frequency Factor 12.0000000

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Calendars > Periods

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_CALNEDAR_PERIOD

Page: GP_CALENDAR_PERIOD

Action: A/UD/DA/C

Calendars (District)

Define calendar parameters such as payee selection and generation control.

Definition	Generation Control	Supporting Element Overrides	Excluded Elements
Pay Group			Calendar ID
Pay Entity			Country
*Period ID	<input type="text"/>	-	
*Payment Date	<input type="text"/>		
*Run Type	<input type="text"/>		
Target Calendar	<input type="text"/>	-	
Time & Labor Calendar	<input type="text"/>	-	

Payee Selection

- Active Payees Only
- Active Payees with...
- Active PLUS Payees with...
- All Payees with...
- Listed Payees Only

Additional Criteria

Additional Criteria apply to "Active Payees with...", "Active PLUS Payees with..." or "All Payees with..." as additional requirements for selection

- Positive Input
- Pending Retroactive Changes

[Definition](#) | [Generation Control](#) | [Supporting Element Overrides](#) | [Excluded Elements](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Calendars > Calendars

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_CALNEDAR

Page: GP_CALENDAR1

Action: A/UD/DA

Calendar Groups (District)

Define calendars to be run simultaneously in one group.

Calendar Groups

Calendar Group ID

*Description Short Description

*Country

Use as template Process by stream

Off Cycle Process retro triggers

Processing initiated

Processing finalized

Calendar List

1-1 of 1 View All

*Sequence	*Pay Group	*Calendar ID		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> +	<input type="button" value="-"/> -

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Framework > Calendars > Calendar Groups

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_CALENDAR_RUN

Page: GP_CALENDAR_RUN

Action: A/UD

Country (Enterprise)

Setup Country configuration and rules for Absence Self Service.

[Entitlement Grid](#) | [History Grid](#) | [Forecasting Grid](#) | [Balances](#) | [Event Entry](#)

Country

Absence Entitlement Q | | | 1 of 1 | View All

*Effective Date + -

Entitlement Balances

- Accrual Period
- From Date
- To Date

Entitlement User Keys

- User Key 1
- User Key 2
- User Key 3
- User Key 4
- User Key 5
- User Key 6

Save
Refresh
Add
Update/Display
Include History
Correct History

[Entitlement Grid](#) | [History Grid](#) | [Forecasting Grid](#) | [Balances](#) | [Event Entry](#)

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Absence Management > Country

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

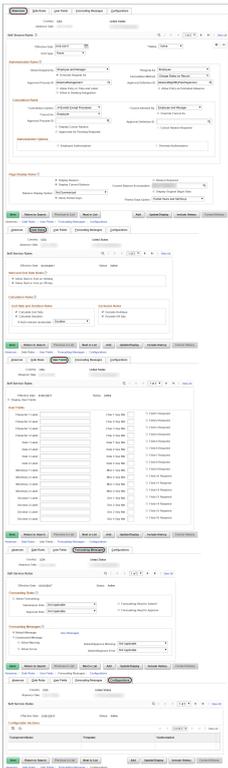
Component: GP_ABS_SS_CNTRY

Page: GP_ABS_SS_CNTRY1

Action: A/UD/DA/C

Country Take

Set up country take configuration and rules for self-service.



Navigation: NavBar > Navigator > Set Up HCM > Product Related > Global Payroll & Absence Mgmt > Absence Management > Country Take

Security:

- ZD Absence Mgmt Local Config
- ZD_AM_ABS_MGMT_CFG
- ZZ_AM_MAINT_ABS_WORK_SCHED_CFG

Menu: DEFINE_PAYROLL_RULES_(GBL)

Component: GP_ABS_BAL_SS_DEF

Page: GP_ABS_ELIG_SS

Action: A/UD/DA/C