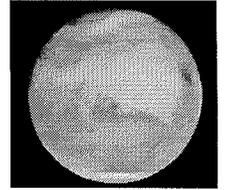
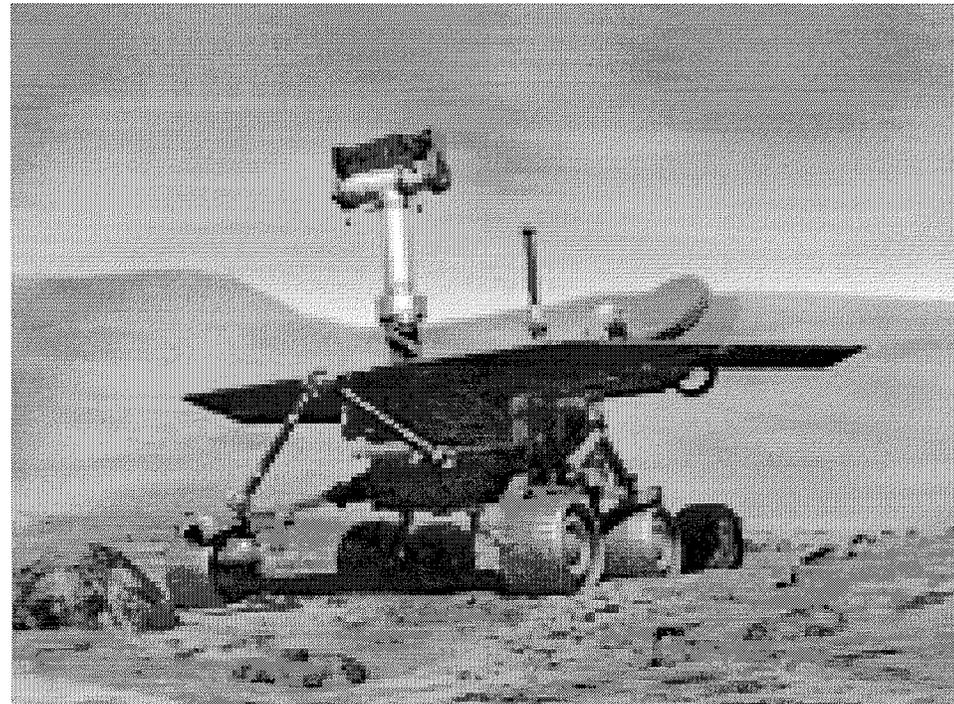


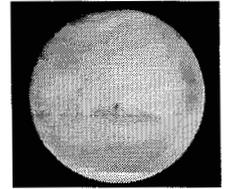
Introduction



- Mars Exploration Rover



Global HRIS SIG Spring 2004 Conference
Las Vegas, Nevada
March 25-26, 2004



HRMS 11i Upgrade and PTO Process Automation

Presenter: Chris Park

chris.y.park@jpl.nasa.gov

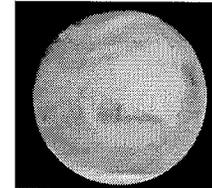
Co-Presenter:

Krishna Kunamaneni

Krishna.P.Kunamaneni@jpl.nasa.gov



Introduction



The Jet Propulsion Laboratory, managed by the California Institute of Technology, is NASA's lead center for robotic exploration of the solar system.

- JPL implemented 10.7 of Oracle HRMS and financial modules in late 1998 and upgraded to 11i in December 2001
- JPL has approximately 5,500+ employees on a bi-weekly payroll



JET PROPULSION LABORATORY
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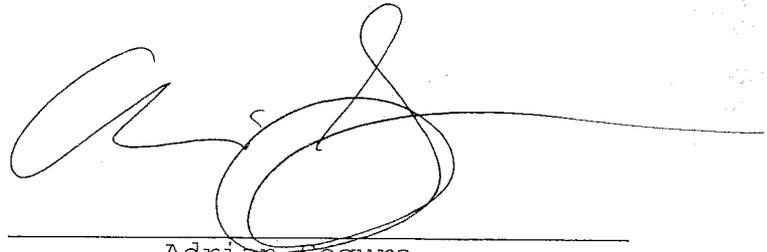
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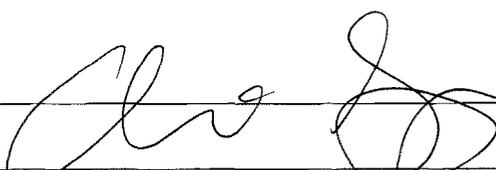
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Chris Park

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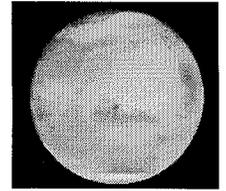
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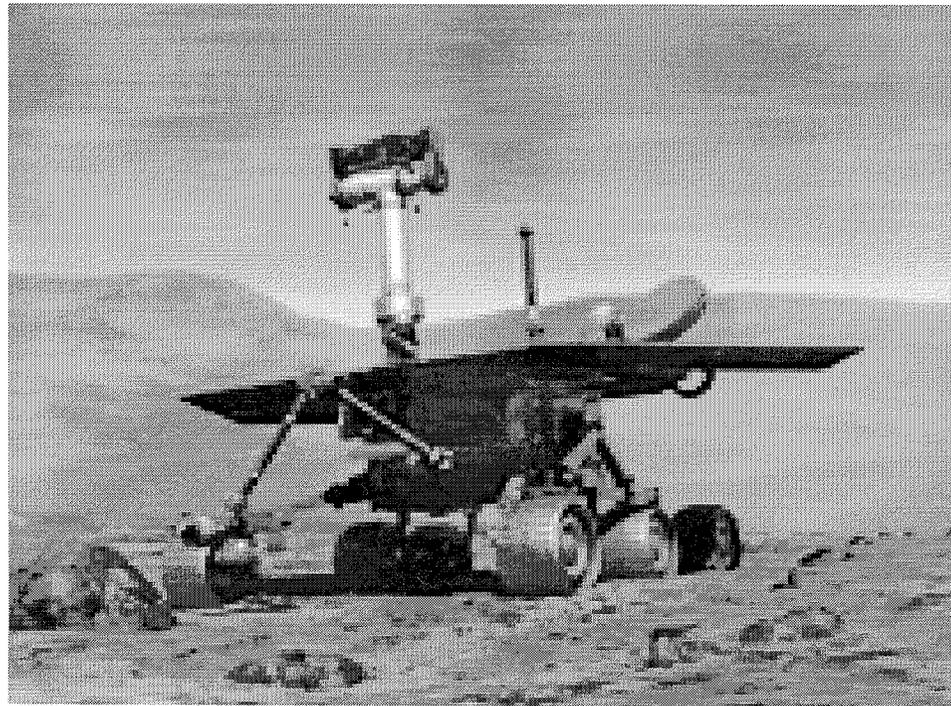


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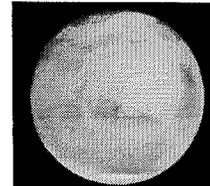
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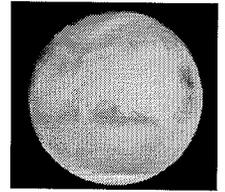
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Introduction



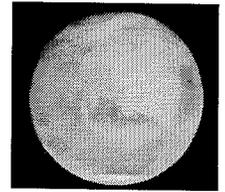
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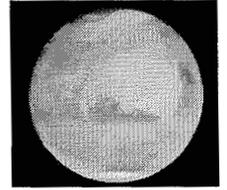


Agenda

- PTO plans at JPL
- 10.7 PTO Issues
- What is new in 11i?
- 11i PTO functionality
- What we achieved in 11i
- 11i PTO overview



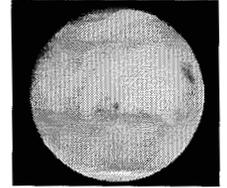
Background



- PTO balance information is available on-line to employees
- JPL uses element-entry-based PTO accruals, not absence formula
- PTO accruals are carried over based on a calendar year, not bi-weekly pay period
- Some PTO entitlements expire at the end of a calendar year
- Some PTO balances roll over to another plan at the end of a calendar year



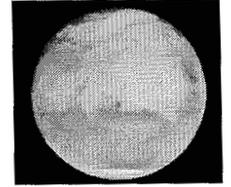
10.7 PTO Functionality



- Fast formulas were not available for defining PTO plans.
- Oracle used a PL/SQL based solution. PTO plans followed the payroll period cycle for accrual and carryover using effective date from start date of pay period inclusive of 01-JAN(Effective 12/27/04 for 2005 carry over)



10.7 PTO Issues

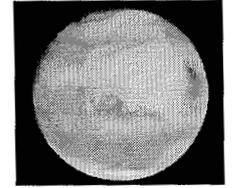


- PTO balances were computed based on effective start and end dates of PTO element entries. Mid-period balances were not available.
- Customizing PTO functionality was difficult and time-consuming. Retroactive adjustments were manual.
- Bi-weekly payroll had challenges carrying over balances using the calendar year cycle.

JPL



PTO Functionality



- Introduced the new input value 'Entry Effective Date' for each element included in the PTO net calculation.
- Provided fast formula based solutions for accrual, absence, carryover, and ineligibility business rules.
- Provided formula functions to be used by formulas. (Oracle function is a program unit that returns a value based on the given parameters.)

JPL



PTO Functionality

- The new input value, 'Entry Effective Date', was created as not required:

The screenshot shows a configuration window for 'Vacation Entitlement'. The 'Effective Dates' section shows 'From 01-JA' and 'Input Values(Vacation Entitlement): 08-FEB-2004'. The 'Processing' section includes 'Standard' and 'Type' options (Nonrecurring, Recurring). The 'Termination' section includes 'Actual Term', 'Final Close', and 'Last Stand'. The 'Priority' is set to 250. The 'Input Values' table is as follows:

Name	Units	Sequence	Required	User Enterable
Date Earned	Date	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Entry Effective Date	Date	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hours	Hours in Decin	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>



PTO Functionality

- Employee Accrual as of 2/8/04:

Accruals: 08-FEB-2004(PARK, CHRIS Y)

Name: **PTO Vacation Accrual** Accrual Category: **Vacation**

Dates

Entitlement Calculation: **01-JAN-2004** - **08-FEB-2004** Net Entitlement: **90.05**

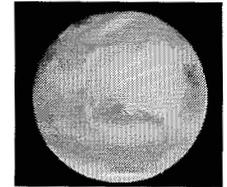
Last Accrual: **08-FEB-2004**

Entitlement Details

Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
PTO Vacation Accrual	Accrual Plan	0	Hours	Add
Carried Over PTO Vacation A	Hours	78.95	Hours	Add
Deceased Vacation	Hours	0	Hours	Subtract
JPL EE Vacation	Hours	0	Hours	Subtract
JPL FMLA Family Vac	Hours	0	Hours	Subtract
JPL FMLA Vacation	Hours	0	Hours	Subtract



PTO Functionality



- Take out the date from Entry Effective Date to see its impact on the balance:

Period	4 2004 Bi-We	Date Earned	01-FEB-2004	Final
Classification		Entry Effective Date	<input type="text"/>	Processed
		Hours	1.850	
Element Name				Effective From
JPL Regular				26-JAN
JPL Regular				26-JAN
JPL Regular				26-JAN
JPL Regular				26-JAN
JPL Regular				26-JAN
Sick Entitlement				26-JAN
Sick Entitlement				26-JAN
Vacation Entitlement				26-JAN
Vacation Entitlement				26-JAN



Entry-Effective Date to see its impact on the balance:

111 PTO Functionality

- Vacation balance is reduced by 1.85:

Accruals: 08-FEB-2004(PARK, CHRIS Y)

Name: **PTO Vacation Accrual** Accrual Category: **Vacation**

Dates

Entitlement Calculation: **01-JAN-2004** - **08-FEB-2004** Net Entitlement: **88.2**

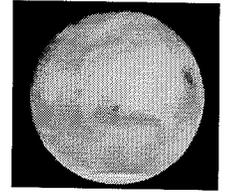
Last Accrual: **08-FEB-2004**

Entitlement Details

Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
PTO Vacation Accrual	Accrual Plan	0	Hours	Add
Carried Over PTO Vacation A	Hours	78.95	Hours	Add
Deceased Vacation	Hours	0	Hours	Subtract
JPL EE Vacation	Hours	0	Hours	Subtract
JPL FMLA Family Vac	Hours	0	Hours	Subtract
JPL FMLA Vacation	Hours	0	Hours	Subtract



III PTO Functionality

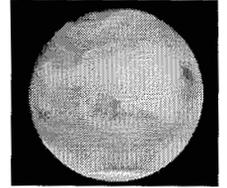


- When creating a PTO element, make 'Entry Effective Date' a mandatory input value.
- If the input value was delivered by Oracle upgrade script, you can make the input value mandatory to avoid the data entry error.

JPL



III PTO Functionality

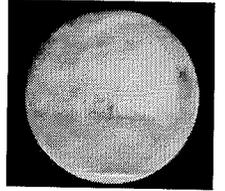


PTO Balances:

- Dynamically calculate based on your PTO plan setups and input values in element entries.
- You can customize the way PTO balances are calculated and are carried over using fast formulas.



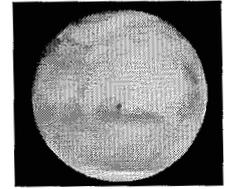
11i PTO Functionality



- In 11i, Oracle delivers seeded PTO-type fast formulas.
- Each seeded accrual formula has an associated carryover formula.
- Review seeded accrual and carryover formulas.



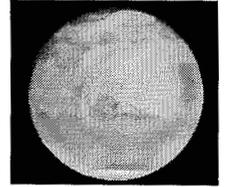
111 PTO Functionality



- PTO_PAYROLL_CALCULATION/CARRYOVER
- An accrual term of one year following the bi-weekly period cycle. Carryover is effective as of 12/27/04 and expires on 12/25/05 for 2004 carryover
- An accrual frequency based on the assignment's payroll period
- Accrual amounts, maximum carryover, and ceilings can be defined in Accrual Bands



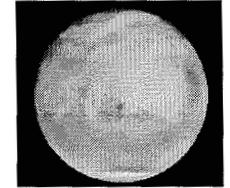
11i PTO Functionality



- PTO_SIMPLE_MULTIPLIER/CARRYOVER
- An accrual term of one year starting 01-JUN
- An accrual frequency of one month (so it is not dependent on a payroll)
- Accrual amounts and ceilings are defined within the formula (so the Accrual Bands window is not required)



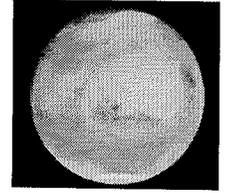
PTO Functionality



- PTO_ROLLING_ACCRUAL/CARRYOVER
- An accrual term of one year with no fixed start date. Accruals are calculated for the previous 12 months
- An accrual frequency of one month (so it is not dependent on a payroll)
- The formula sets accrual amount at two days per month, an accrual ceiling of 20 days
- Carryover is not relevant since the accrual term never ends, but rolls forward.



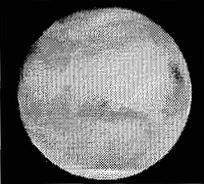
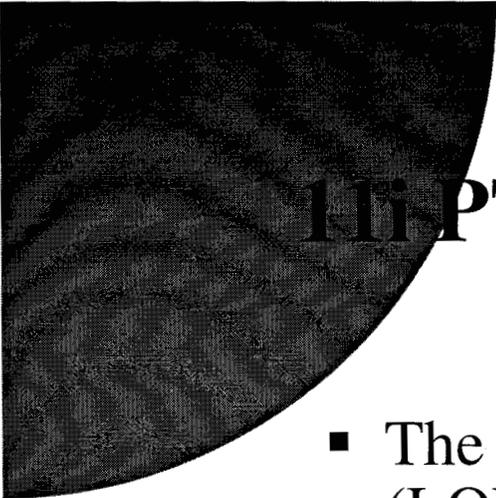
My PTO Functionality



- Choose one of the seeded formulas which is the closest to your rules and create your custom formula.
- Custom fast formulas can be used to make the PTO functionality work according to your company policies.
- Examples ...

JPL



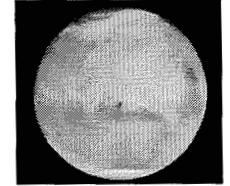


III PTO Functionality

- The accrual formulas are made up of a main formula (LOV on the Define Plan screen) and a sub-formula that is called by the main formula.
- The main formula includes the necessary checks, and any rules you require for the plan.
- It then calculates PTO accrued up to the required calculation date by calling the sub-formula for each PTO period from the start of the term to the calculation date.
- The sub-formula calculates the PTO accrued in the specified period and adds it to a running total.



PTO Functionality



- The following formula types are for use with PTO Accruals:
 - Accrual - Top level formula
 - Accrual Subformula - Used by other Accrual type formulas.
 - Accrual Carryover - Used by the Carryover process
 - Accrual Ineligibility - Used by BEE to determine if an assignment is eligible to use accrued PTO.



PTO Functionality

- Accrual Plans:

Accrual Plans

Plan Name: PTO Vacation Accrual
Accrual Category: Vacation
Accrual Start: Hire Date
Accrual Units: Hours
Description:

Accrual Formulas
Accrual Formula: PTO_PAYROLL_CALCULATED
Payroll Formula: PTO_PAYROLL_CALCULATED
Carry Over Formula: PTO_PAYROLL_CARRYOVER

Absence Information
Name: Vacation Accrual
Units: Hours

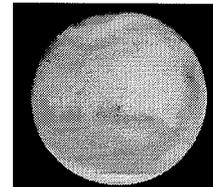
Payroll Balance Reset Date
 No Balance
 1 January
 1 June
 Hire Date Anniversary
 Other

Period of Ineligibility
Length:
Units:
Ineligibility Formula:

Dimension Name:



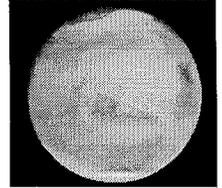
PTO Functionality



- Creating your own formulas:
 - Use the same inputs and return statements as the seeded formulas.
 - Create formula functions and use them in your custom formulas. Formula functions provide the necessary contexts: `ASSIGNMENT_ID`, `DATE_EARNED`, `ACCRUAL_PLAN_ID`, `BUSINESS_GROUP_ID`, `PAYROLL_ID`



PTO Functionality



Inputs and Outputs for Accrual Type Formulas

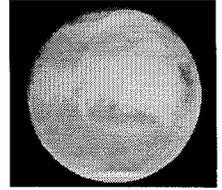
INPUTS ARE calculation_date (date)

<your custom code-formula body>

RETURN total_accrued_pto, effective_start_date,
effective_end_date, accrual_date



11i PTO Functionality



Inputs and Outputs for Carryover Type Formulas

INPUTS ARE calculation_date (date), accrual_term (text)

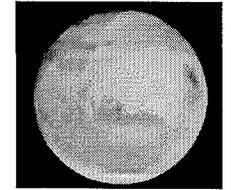
<Your custom code -Formula body>

RETURN max_carryover, effective_date, expiry_date

accrual_term – (PREVIOUS or CURRENT)



11i PTO Functionality



Inputs and Outputs for Ineligibility Type Formulas

INPUTS ARE calculation_date (date)

<Formula body>

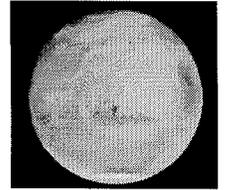
RETURN assignment_eligible

assignment_eligible – Y or N

BEE will create a warning on the batch line if ‘N’



11.1 PTO Functionality

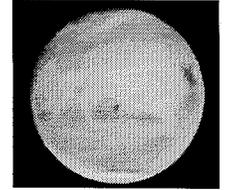


- Use Oracle PTO formula functions:
 - GET_CARRY_OVER (start_date, calculation_date):
calculates the amount of carryover
 - GET_OTHER_NET_CONTRIBUTION (start_date, calculation_date):
 - Calculates any PTO contributions other than absence and carryover between the two input dates.

JPL



111 PTO Issues

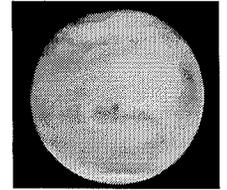


- Issues with the seeded fast formulas:
 - Do not meet user requirements
 - Each PTO plan may require different rules
 - Custom processes may need a stored procedure
 - Slow performance
 - Unnecessary user messages pop up

JPL



1th PTO Customization



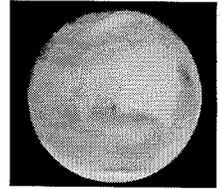
Steps taken to resolve the issues with the seeded fast formulas:

1. Reviewed the functionality of the seeded fast formulas
2. Modified PTO_PAYROLL_CALCULATION as the accrual formula
3. Replaced the call of sub formula PTO_PAYROLL_PERIOD_ACCRUAL with a custom formula function:

```
/*E = LOOP_CONTROL('PTO_PAYROLL_PERIOD_ACCRUAL')*/  
TOTAL_ACCRUED_PTO = jplff_pto (Calculation_Date)
```



11i PTO Customization



Steps taken to resolve the issues with the seeded fast formulas: cont'd

4. Changed the carryover effective date to 01-JAN from the first payroll period's start date(i.e. 27-DEC-2004) and expiration date(25-DEC-2005) to 31-DEC.
5. Assigned the correct values to the required result values:

Accrual Formula: Total_Accrued_PTO,
Effective_start_date, Effective_end_date,
Accrual_end_date

Carryover Formula: Max_Carryover,
Effective_date, Expiry_Date, Process



PLATO Customization

Carryover fast formula example:

DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS
'4712/12/31 00:00:00' (date)

DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31
00:00:00' (date)

INPUTS ARE

Calculation_Date (date),

Accrual_term (text)

Max_carryover = 320

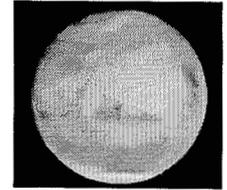
Effective_date = Calculation_date

Expiry_date = to_date('3112' + to_char(add_years(Calculation_date, 1),
'YYYY'), 'DDMMYYYY')

Process = 'YES'

RETURN Max_Carryover, Effective_date, Expiry_Date, Process





PTO Customization

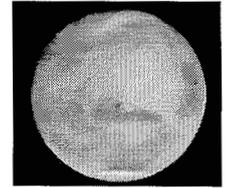
- Using Oracle seeded fast formula;
PTO_PAYROLL_CARRYOVER

Period	Entry Effective Date	27-DEC-2004	Additional
Classification	Expiration Date	25-DEC-2005	Processed
	Hours	168.000	
Element Name			
Carried Over I			<input type="checkbox"/> <input type="checkbox"/>
Residual PTO			<input type="checkbox"/> <input type="checkbox"/>
Basic LTD Ins			<input type="checkbox"/> <input type="checkbox"/>
Basic Life Ins			<input type="checkbox"/> <input type="checkbox"/>
Delta Dental E			<input type="checkbox"/> <input type="checkbox"/>
Delta Dental F			<input type="checkbox"/> <input type="checkbox"/>
EE Life Ins Su			<input type="checkbox"/> <input type="checkbox"/>
Health Care S			<input type="checkbox"/> <input type="checkbox"/>
Health Net PP			<input type="checkbox"/> <input type="checkbox"/>
HealthNet PPO			<input type="checkbox"/> <input type="checkbox"/>
Key Staff ER C			<input type="checkbox"/> <input type="checkbox"/>

- Effective Dates	
From	To
<input type="checkbox"/> <input type="checkbox"/> 27-DEC-2004	<input type="checkbox"/> <input type="checkbox"/> 09-JAN-2005
<input type="checkbox"/> <input type="checkbox"/> 27-DEC-2004	<input type="checkbox"/> <input type="checkbox"/> 09-JAN-2005
<input type="checkbox"/> <input type="checkbox"/> 01-JAN-2004	
<input type="checkbox"/> <input type="checkbox"/> 01-JAN-1998	



11 PTO Customization



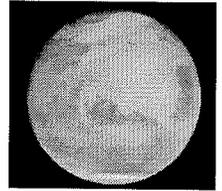
- Using a custom fast formula;
JPLPTO_PAYROLL_CO

Period	1 2005	Entry Effective Date	01-JAN-2005
Classification		Expiration Date	31-DEC-2005
		Hours	158.000
Element Name			
Carried Over PTO Vac			
Residual PTO Vacatio			
Basic LTD Ins			
Basic Life Ins			
Delta Dental ER Liabil			
Delta Dental Pre Tax			
EE Life Ins Suppleme			
Fidelity			

Additional		Processed	
Effective Dates			
	From	To	
<input type="checkbox"/>	27-DEC-2004	09-JAN-2005	
<input type="checkbox"/>	27-DEC-2004	09-JAN-2005	
<input type="checkbox"/>	01-JAN-2004		



111 PTO Customization



- Accrual Form using Oracle seeded fast formula; PTO_PAYROLL_CARRYOVER

Name: **PTO Vacation Fixed** Accrual Category: **Vacation**

Dates

Entitlement Calculation: **01-JAN-2004** **29-DEC-2004** Net Entitlement: **326**

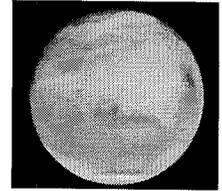
Last Accrual: **26-DEC-2004**

Entitlement Details

Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
PTO Vacation Fixed	Accrual Plan	0	Hours	Add
Carried Over PTO Vacation Fi	Hours	168	Hours	Add
Deceased Vacation	Hours	0	Hours	Subtract
JPL EE Vacation	Hours	-10	Hours	Subtract
JPL FMLA Family Vac	Hours	0	Hours	Subtract
JPL FMLA Vacation	Hours	0	Hours	Subtract



III PTO Customization



- Accrual Form using a custom fast formula:

Name **PTO Vacation Fixed** Accrual Category **Vacation**

Dates

Entitlement Calculation **01-JAN-2004** - **29-DEC-2004** Net Entitlement **158**

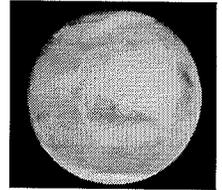
Last Accrual **26-DEC-2004**

Entitlement Details

Element Name	Input Value Name	Total Entitlements	Units	Effect On Net
JPL EE Vacation	Hours	-10	Hours	Subtract
JPL FMLA Family Vac	Hours	0	Hours	Subtract
JPL FMLA Vacation	Hours	0	Hours	Subtract
Vacation Accrual	Hours	0	Hours	Subtract
Vacation Entitlement	Hours	168	Hours	Add
Vacation Fixed Wipeout	Hours	0	Hours	Subtract



PTO Customization

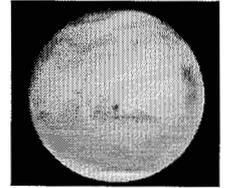


Custom fast formulas accomplished the following:

- Replaced a custom stored procedure with Oracle PTO Carry Over.
- Implemented the company's PTO policies using fast formulas
- PTO data is consistent from Oracle forms to custom programs
- Accrual balances as of 29-DEC-04 don't double up since the carry over is effective as of 01-JAN-05 not 27-DEC-04



11i PTO Customization



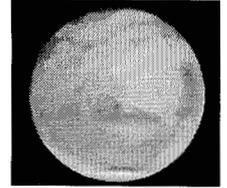
Lessons learned using custom fast formulas:

- As long as you satisfy the return values, the custom fast formulas can handle any customizations you need for PTO accrual or carryover.
- The accrual fast formula is used by Statement of Earnings for sick and vacation balances in addition to Employee Accrual Form.

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111 PTO Customization



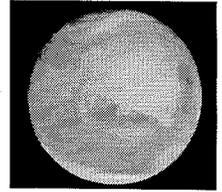
- Other benefits of using the custom fast formulas
 - Custom programs or reports can use external functions used by formula functions to get PTO balances the same way the PTO formulas do.

```
select  
jplper_get_accrual_calc  
(52632,1,to_date('26-DEC-2004'))  
from dual;
```

- Improved performance of View Accrual, Statement of Earnings and Carryover.



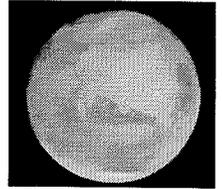
11i PTO Customization



- Other improvements made to PTO processes in 11i:
 - PTO hour adjustment to the prior years
 - Exceeded entitlement recovery process
 - Rollover from one plan to another in each term



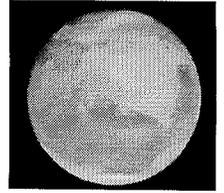
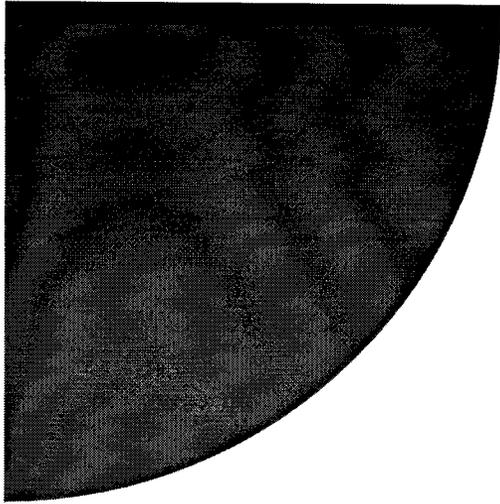
In Conclusion



Overview of 11i PTO functionality

- 11i provided flexibility, data integrity, and process improvement opportunities with regard to PTO. Take full advantage of it!
- Each PTO plan can have its own custom fast formula for accrual and carryover in addition to absence formula.
- More PTO functionality changes are expected in HRMS PF.H family pack (July). Stay tuned!





Questions and Answers

Applause

