Oracle® Self−Service Time

Implementation Guide

Release 11*i*

Oracle® Self–Service Time Implementation Guide

RELEASE 11*i*

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Oracle® Self–Service Time Implementation Guide Release 11*i*

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Contents

Preface

Welcome to Release 11*i* of the *Oracle Self–Service Time Implementation Guide.*

This manual includes the information you need to implement Self–Service Time. It contains detailed information about the following:

- Overview and reference information
- Oracle Self–Service Time implementation suggestions
- Specific tasks you can accomplish using Oracle Self–Service Time
- Oracle Self–Service Time functions and features
- Oracle Self–Service Time system setup

The preface explains how this manual is organized and introduces other sources of information that can help you.

Audience for This Manual

This manual assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Self–Service Time

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User Guide.*

For more information about Oracle Applications products, see: Other Information Sources: page vi.

How To Use This Manual

This manual contains the information you need to understand and use Oracle Self–Service Time.

This preface explains how this manual is organized and introduces other sources of information that can help you. This manual contains the following chapters:

- Chapter 1 describes how to set up Self–Service Time.

- Chapter 2 explains how to customize your implementation to meet your organization's needs.

- Chapter 3 describes the PA Timecard Approval Process.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Self–Service Time.

If this manual refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format

only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this manual is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.

- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.

- Use the documentation CD.

- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this manual was printed.

Related User Guides

Oracle Self–Service Time shares business and setup information with other Oracle Applications products such as Oracle Projects. Therefore, you may want to refer to other user guides when you set up and use Oracle Self–Service Time.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available

with this release of Oracle Self–Service Time (and any other Oracle Applications product).

You can also access this user guide online by choosing "Getting Started and Using Oracle Applications" from the Oracle Applications help system.

Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Oracle Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

User Guides Related to This Product

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Managing People Using Oracle HRMS

Use this manual to learn how to enter information about your employees that use Self–Service Time.

Oracle Payables User Guide

This manual provides information about how approved timecards are paid in Oracle Payables.

Oracle Projects User Guide

Refer to this guide to learn how Self–Service Time uses the Transaction Import open interface to integrate with Oracle Projects.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This manual contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms 6.

Installation and System Administration Guides

Oracle Applications Implementation Wizard User's Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation

of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications–wide features such as Business Intelligence (BIS), languages and character sets, and self–service applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One–Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One–Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process in general and lists database upgrade and product–specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features and enhancements and changes made to database objects, profile options, and seed data for this interval.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Receivables Applications Technical Reference Manual

The *Oracle Receivables Applications Technical Reference Manual* contains database diagrams and a detailed description of Oracle Receivables and related applications database tables, forms, reports, and programs. This information helps you convert data from your existing applications, integrate Oracle Receivables with non–Oracle applications, and write custom reports for Oracle Receivables.

You can order a technical reference manual for any product you have licensed. Technical reference manuals are available in paper format only.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

Oracle Applications Flexfields Guide

This manual provides flexfields planning, setup, and reference information for the Oracle Self–Service Time implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia–based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Self–Service Time working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and unpredictable results throughout Oracle Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has

changed your information because SQL*Plus and other database tools
do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of
software products for database management, applications
development, decision support and office automation, as well as Oracle
Applications. Oracle Applications provides the E–business Suite, a
fully integrated suite of more than 70 software modules for financial
management, Internet procurement, business intelligence, supply chain
management, manufacturing, project systems, human resources and
sales and service management.

Oracle products are available for mainframes, minicomputers, personal
computers, network computers, and personal digital assistants,
enabling organizations to integrate different computers, different
operating systems, different networks, and even different database
management systems, into a single, unified computing and information
resource.

Oracle is the world's leading supplier of software for information
management, and the world's second largest software company. Oracle
offers its database, tools, and application products, along with related
consulting, education and support services, in over 145 countries
around the world.

Your Feedback

Thank you for using Oracle Self–Service Time and this implementation
guide.

We value your comments and feedback. This manual contains a
Reader's Comment Form you can use to explain what you like or
dislike about Oracle Self–Service Time or this manual. Mail your
comments to the following address or call us directly at (650) 506–7000.

> Oracle Applications Documentation Manager
> Oracle Corporation
> 500 Oracle Parkway
> Redwood Shores, CA 94065
> U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

Setting Up Self–Service Time

This chapter describes the steps you need to perform to set up Self–Service Time. It includes information about setting up responsibilities, employees, profile options, and the timecard spreadsheet. It also provides information about interfacing with Oracle Projects and migrating data from Project Time and Expense (PTE).

Setting Up Self–Service Time

Oracle Self–Service Time (SST) is a web application that is fully integrated with Oracle Projects. Users can enter timecards that will then be routed for approval using Oracle Workflow. Users can save partial or complete timecards for later modification and submission, view and modify old timecards, and create timecards in Excel for later upload to the database.

Administrative entry is also supported. This means that you can delegate time entry for all employees to a few administrative users of Self–Service Time.

This document describes:

- How to set up Self–Service Time

- How to migrate data from Oracle Project Time and Expense and Oracle Personal Time and Expense to Oracle Self–Service Time

Notes on Terminology and File Locations

- **Terminology:** In the 11i version of Self–Service Time, the *overriding approver* is called the *approver.*

- **File locations:** Self–Service Time files are located in `$PA_TOP/patch/115/SQL`

Setting Up Responsibilities and Automatic Approval

You must assign the Timecard responsibility to every user that you want to be able to enter timecards using Oracle Self–Service Time. You can also change the level at which automatic approval of timecards is established.

(Optional) Set Up Additional Responsibilities

Profile options are set at the responsibility level, so you can customize the use of the Self–Service Time features. Just create copies of the Self–Service Time responsibility and then configure each responsibility with different profile option settings. For example, you might want users assigned to the Timecards responsibility to have their timecards approved automatically but require users assigned to the Timecards2 responsibility to have their timecards go through the approval process.

▶ **To set up additional responsibilities:**

1. Using the System Administrator responsibility, navigate to the Responsibilities window.

For this field...	Do this...
Responsibility Name	Enter a unique name for the responsibility (for example, Timecards1)
Application	Enter Oracle Self–Service Web Applications
Responsibility Key	Enter a unique name (for example, PA_WEB_TIMECARDS1; if you make another responsibility, use a different key, for example PA_WEB_TIMECARDS2)
Effective Dates	Enter a From and To date (To date is optional)
In the Data Group area:	
Name	Enter Standard
Application	Enter Oracle Self–Service Web Applications

Table 1 – 1   Setting up additional responsibilities (Responsibilities window)

2. Select the Securing Attributes tab and then:

   - Enter ICX_HR_PERSON_ID in the Name field

   - Enter Oracle Self–Service Web Applications in the Application field

3. Save your work.

Setting Up Employees

For each employee that will use Self–Service Time, you must enter information about the employee and set up responsibilities.

Enter Employees

Before employees can use Self–Service Time, you must enter the following employee information:

Information	Window/Tabbed Region/ Field Name	How Information is used in Self– Service Time
Employee Name	People	Name that appears in the employee field in Self–Service Time windows.
Supervisor	Assignment/Supervisor	The employee's HR Supervisor. The default code in the Routing extension routes the timecard to the supervisor for approval.

Table 1 – 2

For more details on entering employee information, see: Employees and Employee Assignments *Oracle Projects User's Guide* or, if you use Oracle Human Resources to enter employees, see: *Oracle Human Resources User's Guide.*

> **Note:** The employee's organization must match or be within the operating unit assigned to the employee's responsibility.

Assign Self–Service Time and Workflow Responsibilities

Before employees can use Self–Service Time they must be defined as application users and assigned the Timecards and Workflow responsibilities. See: Users Window in the *Oracle Applications System Administrator's Guide.*

▶ **To assign responsibilities:**

1. Using the System Administrator responsibility, navigate to the Users window.

2. In the User Name field, query the employee name.

3. Choose the Responsibilities tab and then assign both the Timecards responsibility and the Workflow responsibility to the employee.

   The Timecards responsibility gives the user the ability to access timecards. The Workflow responsibility gives the user the ability to view notifications and view progress of workflow

4. Select the Securing Attributes tab, and then:

   - Enter ICX_HR_PERSON_ID in the Attribute field

   - Use the list of values in the Value field to select the Person ID

5. Save your work.

Assign Users the Authority to Enter Timecards for Other Employees

You can authorize a user to enter timecards for another employee. An employee who is able to enter timecards for another employee is called an *authorized delegate*. For example, you might want to authorize executive assistants to enter timecards for their managers.

▶ **To assign to users the authority to enter timecards for other employees:**

1. Define as applications users any authorized delegates to whom you want to assign the Timecards and Workflow responsibilities.

2. Using the System Administrator responsibility, navigate to the Users window.

3. In the User Name field, query the name of the authorized delegate.

4. Select the Securing Attributes tab, and then:

   - Enter ICX_HR_PERSON_ID in the Attribute field for the delegate.

   - Use the list of values in the Value field to select the Person ID of the employee for whom you want the authorized delegate to enter timecards

5. Save your work.

Configuring Profile Options

Profile options set during implementation specify how Self–Service Time controls access to and processes data. In addition to Self–Service Time profile options, Self–Service Time uses profile options from:

- Oracle Self–Service Web Applications (prefix ICX)

- Oracle Projects (prefix PA)

- Multiple Organizations (prefix MO). See: *Multiple Organizations in Oracle Applications.*

> **Note:** The prefix for all Self–Service Time profile options is "PA Time."

You can configure the profile options at one or more levels, including Site, Application, Responsibility, and User. For more information, see the *Oracle Applications System Administrator's Guide.*

► **To set profile options:**

1. Using the System Administrator responsibility, navigate to the Find System Profiles window.

2. At the appropriate level, query the profile option that you want to configure (enter the name of the profile option and choose Find) and then make an entry at the desired level (Application, Responsibility, or User).

To set the profile option at this level...	Do this...
Application	Select Application and enter Oracle Self–Service Web Applications
Responsibility	Select Responsibility and enter Timecards (or a different responsibility)
User	Select User and enter the user name

Table 1 – 3

> **Important:** When configuring profile options at the application level, enter Oracle Self–Service Web Applications, *not* Oracle Projects.

3. Save your work.

Overview

Table 1 – 4 lists the profile options that affect Self–Service Time. Each profile option is described in the sections that follow.

The table below indicates whether the "User" can view or update the profile option and at which System Administrator levels the profile options can be updated: at the Site, Application, Responsibility, or User levels.

A "Required" profile option requires you to provide a value. An "Optional" profile option provides a default value, so you only need to change it if you don't want to accept the default.

Profile Option	User Resp.	System Administrator Responsibility				Requirements	
	User	User	Resp	App	Site	Required?	Default Value
ICX: Date Format Mask	✓	✓			✓	Yes	DD–MON–RRRR
ICX: Language	✓	✓			✓	Yes	American English
ICX: Limit Connect		✓			✓	Yes	1000
ICX: Limit Time		✓			✓	Yes	4 hours
PA: Override Approver**		✓	✓	✓	✓	No	
PA Time: Allow Entry of Negative Hours			✓	✓	✓	No	
PA Time: Timecard Number Prefix			✓	✓	✓	Yes	
PA Time: Enable Business Message			✓	✓	✓	No	
PA: AutoApprove Timesheets**			✓	✓	✓	No	
PA Time: Self–Service Time Licensed					✓	Yes	
MO: Operating Unit			✓		✓	Yes*	

✓   You can update the profile option

*   Yes if multiple organizations are enabled; otherwise, not required

**   This profile option is shared by Oracle Projects and Self–Service Time (prefix is PA)

Table 1 – 4 Profile Options (Page 1 of 1)

ICX: Date Format Mask

Determines the date format. The American English default format is DD–MON–RRRR (for example, 07–JAN–1999).

For year 2000 compliance, all year formats are converted to RRRR, which accepts four–digit century and year entries verbatim (for example, 1950 is stored as 1950). Two–digit year entries of 00 through 49 are converted to 2000 through 2049, and entries of 50 through 99 are converted to 1950 through 1999.

ICX: Language

Specifies the language used in Self–Service Time. The default is American English.

ICX: Limit Connect

Sets the maximum number of page hits per session. The default is 1000.

ICX: Limit Session Time

Sets the maximum number of hours a user can remain logged on, per session. The default is four hours.

PA: Override Approver

Determines whether users can enter an overriding approver for timecards.

You can view and update this profile option at the site, responsibility, application, and user levels.

Internal name: PA_ONLINE_OVERRIDE_APPROVER

Permitted values:

Yes: The Overriding Approver field is visible and users can select an overriding approver from a list of values. The default list of values contains all supervisors in the preparer's business group. A supervisor is someone who is defined in the HR People–Assignment window.

No or <no value>: The Overriding Approver field is not visible and users cannot select an overriding approver. The approver is determined by the Routing extension. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

> **Note:** After enabling the profile option, configure the Override Approver view to meet your requirements. See: PA: Overriding Approver: page 1–8.

PA Time: Allow Entry of Negative Hours

Determines whether users can enter negative hours in the Create New Timecard screens in Self–Service Time. You can set this profile option at the site, application, or responsibility level.

Internal name: PA_SST_ALLOW_NEGATIVE_TXN

Permitted values:

Yes: Users can enter negative hours.

No or <no value>: Users cannot enter negative hours.

PA Time: Timecard Number Prefix

You can specify a prefix (up to 5 characters long) to append to the beginning of the timecard number. For example, if you enter "DMV", the system generates timecard numbers such as DMV1234, DMV1235,

and so on. You can set this profile option at the site, application, or responsibility level.

Internal name: PA_SST_TC_NUM_PREFIX

<No value>: Display a dash (–) before the timecard number.

PA Time: Enable Business Message

Self–Service Time supports the display of a custom business message in the Final Review, Timecard Details (View History), Submit, Confirmation, and Approver Review windows.

This profile option indicates whether the Self–Service Time displays a business message in the user window. If the profile option is set to Yes, Self–Service Time calls the Business Message Display client extension (see: Business Message Display Extension: page 2–22). You can set this profile option at the site, application, and responsibility levels.

Internal name: PA_SST_ALLOW_ENABLE_BUS_MSG

Permitted values:

Yes: Enable display of custom business message field.

> **Note:** This field displays a value only if the Business Message Display extension returns a value. Otherwise, the message field is empty.

No or <no value>: Default value is No (custom business message field is not displayed).

After you enable the profile option, define the message in Application Object Library (AOL) using the Application Developer responsibility. You can use up to three tokens in your message. Use a custom application name for your message to preserve the message in future upgrades. For more information about messages, see: *Oracle Application Object Library/Workflow Technical Reference Manual*. For information about customizing the default business message (Billable Percentage), see: Customizing Messages: page 2–11.

Next, configure the Business Message Display client extension to return the message defined in AOL with any tokens required. The Business Message Display Extension contains default code (marked as a comment) that returns a message displaying the billable percentage for the timecard. If this meets your requirements, remove the comment characters from the default code to display the billable percentage message in the Self–Service Time windows. See: Using Web Application Dictionary to Customize Reports: page 2–3.

(Optional) PA: AutoApprove Timesheets

You may decide that you do not need approvals for employee time entries and want to approve timecards automatically. This profile option controls whether timecards submitted from Self–Service Time can be approved automatically.

Internal name: PA_PTE_AUTOAPPROVE_TS

Permitted values:

Yes: The timecard status automatically changes to Approved. You do not need to route or review your timesheets.

No or <no value>: Default value is No (all timecards require review and approval).

You can view and update this profile option at the application level.

This profile option integrates with the AutoApproval client extension. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

PA Time: Licensed

Set this profile option to indicate that Self–Service Time is implemented. You can set this profile option only at the site level.

Internal name: PA_SST_LICENSED

Permitted values:

Yes: Self–Service Time is implemented and users can enter timecards.

No or <no value>: Default value is No. Self–Service Time is not implemented and users cannot enter timecards.

MO: Operating Unit

If you use the Multiple Organization Support feature, use this profile option to assign operating units to responsibilities. See: *Multiple Organizations in Oracle Applications.* You can set this profile option at the responsibility and site level.

> **Note:** Be sure that the employee's organization matches or is within the operating unit assigned to the employee's responsibility.

Setting Up Descriptive Flexfields

Define descriptive flexfields to record additional information in the Details window during time entry. You can also define custom fields, called *global flexfields*, that appear for every hour that a user enters. These values are stored in the numbered ATTRIBUTE columns in the PA_EI_DENORM table, ATTRIBUTE1_1 to ATTRIBUTE1_10 through ATTRIBUTE7_1 to ATTRIBUTE7_10. This represents 10 segments for each day of the week.

You can also define context–sensitive flexfields that appear only when a user selects a particular type. For example, when selecting Overtime – Professional in the Type field, a custom field appears for Overtime Approved By. Context–sensitive fields can be based only on the expenditure type or the expenditure type class.

Oracle Self–Service Time and Oracle Projects share the same set of descriptive flexfields. They are enabled or disabled in both applications at the same time.

For detailed information about defining descriptive flexfields, see: *Oracle Applications Flexfields Guide.* The following discussion provides some tips for defining descriptive flexfields.

Prerequisites

Plan the global and context–sensitive flexfields you need. Remember that you can use ten Attribute columns, so using global data element fields reduces the number of Attribute columns available for context–sensitive fields. See: Flexfield Concepts *Oracle Applications Flexfields Guide.*

▶ **To set up descriptive flexfields:**

1. Using the System Administrator responsibility, navigate to the Descriptive Flexfields Segments window (Application> Flexfield > Descriptive > Segments).

   Specify the Expenditure Type Class or Expenditure Type values for which you want to display additional flexfields. For more information on this window, see: Descriptive Flexfield Segments Window in the *Oracle Applications Flexfields Guide.*

   • For Application, query Oracle Projects.

   • For Title, query Expenditure Items.

- For Reference Field, enter either SYSTEM_LINKAGE_FUNCTION (used for Expenditure Type Class) or EXPENDITURE_TYPE.

2. In the Context Field Values area, enter a line for each Expenditure Type Class or Expenditure Type for which you want to display unique custom fields. For example:

- Code: OT

- Name: OT

- Description: All overtime requires approval

    Important: Context–sensitive flexfields do not appear in Self–Service time unless you enter the Context Field Values in the Code field exactly as they have been defined and stored in the PA_ONLINE_EXPENDITURE_TYPES_V view. The Name and Description fields contain values that you create.

3. Choose Segments to display the Segments Summary window.

    Use this window to define the segments for the global data element context (global flexfields) and each context field value (context sensitive flexfields).

4. Define the fields you want to appear and the values the users can enter for the field:

- For Value Set, enter the specific values the user must enter (if any), and then choose Open.

- For Default Type, if you enter a value other than *Constant*, you must customize the PA_CLIENT_EXTN_SST_DFF.POPULATEDFLEXDEFAULT client extension. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

    Note: Unlike Self–Service Expenses, the Description field is *optional* for Self–Service Time. All enabled descriptive flexfields appear in both Self–Service Time and Oracle Projects.

    For more information on the Segments Summary window, see: Context Field Values *Oracle Applications Flexfields Guide.*

5. To define valid values for the field, first define a value set by entering a unique name for the value set. To do this, choose the Value Set button. In the Value Sets window, set the options you want:

- Select Enable Longlist for very long lists, for example, a list of employees. If you enable this option, the custom field appears as

a text field. If you want the field to display a poplist with all possible values, disable this option. Disable this option only for small lists, because long poplists slow performance.

- To validate the format of data entered in the field, specify validation criteria in the Format Validation area.

- To validate the format of data entered in the field, specify validation criteria in the Format Validation area. Choose from the following validation types:

    – Numbers only

    – Uppercase only

    – Format type character

    – Maximum size

- For Validation Type, select Independent, None, or Table:

    – Independent: flexfield appears as a poplist

    – None: flexfield appears as text

    – Table

        – **Checklist:** If you want the value to appear as a check box instead of the default described below, assign the PA_SRS_YES_NO_LOV value set for that particular custom option.

        – **Poplist:** If the select statement does not contain bind variables, the list of values values is generated automatically. However, if it does contain bind variables, use the client extension to define the list of values. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

        Note: If you want the value to appear as a check box instead of the default described below, assign the PA_SRS_YES_NO_LOV value set for that custom option.

If the select statement does not contain bind variables, the system generates a list of values values automatically. However, if the statement does contain bind variables, use the client extension to define the list of values. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

For more information, see: Defining Value Sets in the *Oracle Applications Flexfields Guide*.

6. Save your work.

7. If you have defined a value set with independent validation type, navigate to the Segment Values window (Application > Flexfield > Descriptive > Values), then define and enable the valid values for the new fields you are defining. For more information, see: Segment Values Window in the *Oracle Applications Flexfields Guide*.

8. Save your work, return to the Segments window, enable the new fields, and then save again.

9. Return to the Descriptive Flexfield Segments window. Enable the Context Field Values you want to use and then check the Freeze Flexfield Definition box. Choose the Compile button to compile the descriptive flexfield definition.

Customizing Flexfield Routines

Self–Service Time provides routines that you can customize. The routines are included in the $PA_TOP/patch/115/sql/PAPSSDFB.pls file, in the PA_CLIENT_EXTN_SST_DFF package. See: Notes on Terminology and File Locations: page 1–2.

Self–Service Time provides a "hook" to each of these routines. You can edit them to provide custom, default values, and poplist values.

> **Note:** You are responsible for the support and upgrade of the logic within these two procedures, which may be affected by database or other changes between releases of Oracle Applications. Make a copy of all custom code and place it in a directory protected from upgrade. After an upgrade, if appropriate, reapply any custom code.

The routines you can customize are:

- POPULATEDFLEXPOPLIST – Customize this procedure to generate custom poplist values. Instead of using the value set values you define in the Segment Values window for value sets with independent validation, you can provide a subset of those values in the poplists. For more information, see: Custom Populate Descriptive Flex Poplist: page 2–24.

  > **Note:** If the select statement does not contain bind variables, the system generates the poplist values automatically. However, if it does contain bind variables, use the client extension to define the poplists.

- POPULATEDFLEXDEFAULT – Customize this procedure to generate custom default values based on the user's ID instead of the value defined in the Default Value field in the Segments

window. You can customize this procedure to provide defaults for custom fields based on information in the Timecard Information page or other area of Self–Service Time, such as the Employee name or Week Ending date. For more information, see: Custom Default Descriptive Flex Poplist: page 2–26.

Setting the Week Ending Day

Self–Service Time uses the Expenditure Cycle Start Day that you set up when implementing Oracle Projects to determine the Week Ending Day. If you specify Monday as the expenditure cycle start day, the week ending date is the following Sunday. You can choose any day of the week as your expenditure cycle start day.

> **Note:** Once it is set up, you cannot change the expenditure cycle start day.

Setting Charge Controls

Self–Service Time uses the following charge controls (set up in Oracle Projects):

- Project Status: Indicates if any charges are allowed for the project.

- Task Chargeable Status: Specifies a lowest task as chargeable or non–chargeable (indicates whether any charges are allowed for the task).

- Start and Completion Dates: Specifies the start and completion dates of a lowest task to record the date range for which charges are allowed for the task. The start and completion dates of the project also limit when transactions can be charged.

- Transaction Controls: Specifies the type of transactions that are chargeable or non–chargeable for the projects and tasks. See: Transaction Controls in the *Oracle Projects User Guide.*

Setting Up the Spreadsheet for Offline Entry

Some Self–Service Time users may not have access to Self–Service Time when away from the office. These employees can record their time in a spreadsheet and then upload the spreadsheet into Self–Service Time upon returning to the office.

Self–Service Time provides a predefined Microsoft Excel (.xls) file you can use to enter hours. To use the predefined spreadsheet with Self–Service Time, you must use Excel 5.0 or higher. The spreadsheet uses Visual Basic objects to create entries for the Type field and Visual Basic objects are not supported in earlier Excel versions.

Prerequisites

❑ Install Microsoft Excel 5.0 or higher.

❑ Copy the spreadsheet file from /OA_HTML/<language> virtual path to a separate directory protected from upgrade.

▶ **To set up the spreadsheet for offline entry:**

1. Open and unprotect the spreadsheet: page 1–16.

   The predefined .xls file (pawtimes.xls) is located in $PA_TOP/html/US and is copied to /OA_HTML/<language> virtual path on your Web Server during installation.

2. Format the Week Ending date field: page 1–17.

3. Populate the options in the Type field: page 1–17.

4. Change the Week Ending Day: page 1–18.

5. Create cell links: page 1–19.

6. Change prompts: page 1–20.

7. Set up global descriptive flexfields: page 1–20.

8. Protect the spreadsheet and check your work: page 1–24.

   Suggestion: Save your work periodically.

Open and Unprotect the Spreadsheet

The spreadsheet is protected from unauthorized changes. Before you start, you must unprotect (unlock) it.

▶ **To open and unprotect the spreadsheet:**

1. Open the spreadsheet file (pawtimes.xls) and display all
   worksheets tabs. To do this, choose Options from the Tools menu,
   choose the View tab, and then check the Sheet Tabs check box.

   The predefined spreadsheet includes five worksheets: Timecard,
   Types, Other Setup, Cell Links, Prompts, and Timecard Flexfield
   Example.

2. Unlock the spreadsheet so you can edit it. To do this, choose
   Protection from the Tools menu, then choose Unprotect Sheet.

Format the Week Ending Date Field

▶ **To format the Week Ending date field:**

1. If necessary, select the Timecard worksheet tab.

2. Format the Week Ending date field with the date format used in
   Oracle Applications. To do this, select the cell to format, then
   choose Format>Cells>Custom. Then, select the appropriate date
   format.

   For example, if your date format in Oracle Applications is
   DD–MON–RR, set the date format to DD–MON–YY for the Week
   Ending field. Similarly, if the date format in Oracle Applications is
   DD–MON–RRRR, set the date format to DD–MON–YYYY.

   Additional Information: See: ICX: Date Format Mask: page
   1–7.

Populate the Options in the Type Field

The system generates the Type options in the Timecard worksheet from
the values in Column A of the Types worksheet.

▶ **To populate the options in the Type field:**

1. The Types worksheet contains predefined values as examples.
   Add, delete, or change these values as required.

To...	Do this...
Add a Type	Insert a row in the middle of the list and then enter the new Type to add.
	Note: Do not add rows to the bottom of the list of defined values. To keep the current cells and the poplists synchronized, make all changes between the first and last row. Do not type in Rows 1 and 2.
Delete a Type	Delete the row from the list of defined values (choose Edit> Delete Row).
Create a default Type	Enter a value in Column A2. Self–Service Time displays the contents of Column A2 by default in the Type field. If you leave Column A2 empty, the default value in the poplists will be blank.
Alphabetize the Types in the poplists	Choose Sort from the Data menu.

Table 1 – 5 Types Worksheet

Note: Type the System Linkage Code and Expenditure Type that you use in Column B and C exactly as they were entered in Self–Service Time. Otherwise, the system displays errors when uploading the spreadsheet. Look up all working values of System Linkage Code and Expenditure Type in the Expenditure_Type and System_Linkage_Function columns in the view PA_ONLINE_EXPENDITURE_TYPES_V. Make sure they are active by looking at the values stored in the following columns:

- Sys_Link_Start_Date_Active

- Sys_Link_End_Date_Active

- Expnd_Typ_Start_Date_Active

- Expnd_Typ_End_Date_Active (To set a default value for this field, enter the value in row 2.)

2. Test your changes by selecting the Timecard worksheet and reviewing the options in the Type field.

Change the Week Ending Day

You selected the week ending day in the section: Setting the Week Ending Day: page 1–15. Define the week ending day in your spreadsheet to use the same day.

▶   **To change the week ending day:**

1. Select the Other Setup worksheet tab.

2. Enter a number between 1 and 7 in cell B1. Each number represents a day of the week (for example, enter 4 if you want the Week Ending day to be Wednesday):

    1 – Sunday

    2 – Monday

    3 – Tuesday

    4 – Wednesday

    5 – Thursday

    6 – Friday

    7 – Saturday

3. Select the Timecard worksheet to see the effect of your change. The week ending day always appears last in the spreadsheet.

    Note: If a user enters a date in the Week Ending field that is at the end of the week, then all seven dates for the week appear above the days. Otherwise, no dates are displayed.

4. *(Optional)* If users never work on particular days (Saturday and Sunday, for example), remove those columns from the Timecard worksheet.

Create Cell Links

Cell links determine the default value shown in a poplists. You probably do not need to modify this worksheet unless you want to set a default for the Type field or if you are setting up descriptive flexfields.

▶ **To create cell links:**

1. Select the Cell Links worksheet tab.

2. The default for the Type field in the Timecard worksheet is set in Column A. Modify the values as needed:

    A value of 1 indicates a blank value (default shipped in product). A value of 2 indicates the first set of values defined in the Types worksheet, a value of 3 for the second set of values defined in the Types worksheet, and so on.

    The value stored in cell A2 affects the Type in Line 1 of the Timecard worksheet, A4 affects Line 2, A6 affects Line 3, and so on.

    Changes are reflected immediately in the Timecard worksheet.

Change Prompts

You can change many of the prompt names shown in the Timecard worksheet.

▶ **To change the prompt names:**

1. Select the Prompts worksheet tab.

2. Change the values in Column B.

> **Important:** If you change any prompts on the spreadsheet, query PA_WEB_TIME_SPREADSHEET in the Region Items window in Oracle Web Applications Dictionary and change the corresponding Long Label (Prompt). If you do not change the long label, the system does not recognize the spreadsheet prompt and ignores any value you enter for it.

> For more information on customizing the Long Label (Prompt), see: Using Web Application Dictionary to Create Reports: page 2–3 or: Associating Attributes with Regions in the *Oracle Web Applications Dictionary User's Guide.*

Set Up Global Descriptive Flexfields

You cannot include context–sensitive descriptive flexfields in the spreadsheet. However, you can add descriptive flexfields to the spreadsheet as long as they are global (that is, they affect all hours entered, regardless of their Type).

▶ **To set up global descriptive flexfields:**

1. Define the flexfields in Oracle Applications: page 1–11.

2. Enter the window prompts for the segments: page 1–21.

3. Enter text flexfields: page 1–21.

4. Copy and paste the check box and poplist examples: page 1–21.

5. Determine the location of cell links for check boxes and poplists: page 1–22.

6. Complete the setup for check boxes: page 1–22.

7. Complete the setup for poplists: page 1–23.

Before you define flexfields in the spreadsheet, you must define them in Oracle Applications.

▶ **To define the flexfields:**

1. In Oracle Applications, open the Segments Summary dialog window (Application > Flexfield > Description > Segments > Segment button) from the Global Data Elements descriptive flexfield setup.

2. Note the window prompts for all global flexfields you are using (they are case sensitive) as well as the order in which they were defined.

3. Select the Timecard Flexfield Example worksheet tab. This worksheet shows an example of global flexfields for a text box (Example 1), check box (Example 2), and poplist (Example 3).

   This worksheet is for your information only and is not a functional area of the spreadsheet. To modify flexfield definitions, open the Timecard worksheet tab.

Enter the window prompts for the segments

About text flexfields: Once you define the flexfields in Oracle Applications and enter the window prompts for the segments, no further action is required to set up text flexfields. Users enter data directly into the spreadsheet cell and formulas are unnecessary.

▶ **To enter window prompts:**

1. Select the Timecard worksheet tab.

2. After each row containing Comments in the Line Type column, add a row for each global flexfield segment.

3. In the Line Type column, enter the window prompts of the segments in the order in which they were defined in Oracle Applications. Repeat this step for each row that you added to the spreadsheet in step 2.

Copy and paste the check box and poplist examples

Do this step only for check box and poplist flexfields.

▶ **To copy examples:**

1. Open the Timecard Flexfield Example worksheet. Be sure that the worksheet is "unprotected" (Tools>Protection>Unprotect Sheet), then copy the example check box and poplist objects.

2. Select the Timecard worksheet tab, and then paste the example into each day column (Sunday through Saturday) for each row that you added in step 2 of the section above (the global flexfield segments).

Determine the location of cell links for check boxes and poplists

The state of each check box and poplist is stored in a cell in the Cell Links worksheet. To determine the column and row, the spreadsheet uses the following mapping:

- The column is equal to column...

  - B if the checkbox or poplist object corresponds to Sunday,

  - C if the checkbox or poplist object corresponds to Monday,

  - and so on through column H, which corresponds to Saturday.

  Note: This information assumes that you specified a week ending day of 7, or Saturday. See: Change the Week Ending Day: page 1–18.

- For rows, use the spreadsheet row in which the check box or poplist appears.

  Note: When setting up descriptive flexfields in the Cell Links worksheet, be careful not to overwrite any existing values in Column A or allow the cell links of one descriptive flexfield to interfere with another.

Complete the setup for check boxes

▶ **To complete the setup for check boxes:**

1. Right click on the check box cell.

2. Select Format Object.

3. Enter your cell reference in the Cell Link field in the Control tab.

   Example: 'Cell Lines !B3. Replace B3 with the row column from the previous step (see: Determine the location of cell links for check boxes and poplists: page 1–22).

4. Enter the check box formula in the cell containing the check box.

   Example: The formula IF('Cell Links'!B3=TRUE,"Y","N") returns Y (Yes) for selected check boxes and N (No) for unselected check boxes. The formula returns Y if the check box that references cell

B3 in the Cell Links worksheet is selected. Replace B3 with the value specified in the Cell Link field in the Control tab.

Complete the poplists setup

▶ **To complete the poplists setup:**

1. Verify that you have pasted the example poplist into the Timecard worksheet. See: Copy and paste the check box and poplist examples: page 1–21.

2. Select the Types worksheet.

3. Starting in Column E, you can define your own options for the list of values. Modify the values (they are case sensitive) to match what you defined in the corresponding value set used for Oracle Applications.

   The name of your descriptive flexfield segment and poplist values must match those created in the application. See: Setting Up Descriptive Flexfields: page 1–11.

4. Select the Timecard worksheet tab, then select one of the poplists you just created.

5. Click your right mouse button on the newly–created poplists, then choose Format Object.

6. Select the Control tab and format the Input Range field. The value in the field creates the formula associated with the poplists.

   The Input Range field controls where the values for the poplists are stored. For example, "Types!$E$2:$E$6" indicates that the poplist values are located from cell E2 to cell E6 in the Types worksheet.

7. Select the Control tab and format the Cell Link field. As with the Input Range field, the value in the field creates the formula associated with the poplists.

   The Cell Link field holds the value associated with the selected item from the poplists. For example, "Cell Links'!$B$2" means that the cell values will be stored in cell B2 in the Cell Links worksheet. Replace B2 with the row column calculated when you determined the location of the cell links. See: Determine the location of cell links for check boxes and poplists: page 1–22.

8. Repeat steps 5–7 for each new poplist, then save your work.

Check Your Work and Protect the Spreadsheet

When your changes are complete, protect the spreadsheet from changes and do a final check of your work.

▶ **To test your customizations and protect the spreadsheet:**

1. Protect the Timecard worksheet by choosing Tools > Protection > Protect Sheet.

2. Verify that the Timecard worksheet (including the Type poplists and any descriptive flexfields) works properly.

3. Hide all worksheet tabs: choose Tools> Options, choose the View tab, then deselect the Sheet Tabs check box.

4. Click in the first cell a user would usually select, such as the Week Ending field.

5. Protect your changes: choose Tools> Protection> Protect Sheet.

6. Save the spreadsheet.

7. Store the spreadsheet on the web server in the virtual directory OA_HTML/US. This makes the spreadsheet available for download from the Self–Service Time main menu.

Self–Service Time Interface to Oracle Projects

Self–Service Time uses the Transaction Import open interface to integrate with Oracle Projects. You can use the Batch Name Determination Extension to group timecards for Transaction Import into Projects. You can also customize this extension to meet your needs.

By default, timecards are grouped by week ending date and employee organization. See: Using Client Extensions Customize Self–Service Time: page 2–12.

Importing Transactions

▶ **To import the approved timecards from Self–Service Time into Oracle Projects:**

1. Using the Projects responsibility, navigate to the Submit Request window.

2. Run the PRC: Transaction Import process, using a Transaction Source of Self–Service Time.

   You can import all the batches at the same time, or select a batch from the list of values in the Batch field.

3. Click Submit Request.

Importing Negative Transactions from Self–Service Time

The Matched Status Override Extension controls whether the status of negative transactions is "matched" or "unmatched." See: Matched Status Override Extension: page 2–18.

If the status of the negative transaction is matched (the default setting), transaction import tries to match the transaction with a positive transaction of the same expenditure item date, project, task and expenditure type. If a match isn't found, the transaction is rejected.

Importing Rejected Unmatched Transactions

You can view the rejected transactions in the Review Transaction window and change the Unmatched Negative Transaction attribute of the rejected transaction from *No* to *Yes*. Then, run Transaction Import again to import the previously rejected transactions into Projects.

▶ **To import rejected unmatched transactions:**

1. Using the Projects responsibility, navigate to the Review Transactions window.

2. Enter Self–Service Time in the Transaction Source field, and the batch name in the Batch field (Optional).

3. Choose Transaction Status Import–Rejected, then click the Find button.

4. Find the rejected transaction. The system displays a rejection reason of No Matching Item.

5. Navigate to the Unmatched Negative Transaction field (you may need to use the folder tools to do this). Change the value of the flag from No to Yes.

6. Choose the Import button.

7. In the Review Transaction window, query your transaction to verify that it was imported successfully.

Adjusting Transactions Imported from Self–Service Time

In Oracle Projects you can adjust transactions imported from Self–Service Time. However, the adjustments are not visible in Self–Service Time. Additionally, transactions adjusted in Self–Service Time (using matched negative transactions) cannot be adjusted in Oracle Projects.

Migrating Data from ProjTE and PTE to Self–Service Time

All timecards in your existing application—either Personal Time and Expense (PTE) or Project Time and Expense (ProjTE)—must be submitted and approved before they are eligible to be migrated to Self–Service Time.

During the migration to Self–Service Time, the system prompts you to specify the historical data to migrate. All of the selected online timecards (created from PTE or ProjTE) are upgraded to Self–Service Time. After migration, these timecards are visible from the Self–Service Time application as historical records.

Parameters

The migration script contains parameters you can use to select the transactions to migrate from ProjTE/PTE to Self–Service Time. The parameters include:

- Operating Unit ID (organization_id of the operating unit)
- Incurred by Person Number (employee number)
- Incurred by Organization Name (expenditure organization name)
- pte_ote_or_both (1=PTE only; 2=ProjTE only; 3=both)
- Starting Expenditure Ending Date
- Ending Expenditure Ending Date

The following parameters are required:

- Operating Unit ID (for multiple organization installations)
- Incurred by Person Number *or* Incurred by Organization Name

All other parameters must contain a value or be NULL.

▶ **To migrate timecard data to Self–Service Time:**

1. Log on to your server.

2. Change your directory to:

   - $PA_TOP/patch/115/sql (See: Notes on Terminology and File Locations: page 1–2.)

3. Run the following migration script:

   ```
   $ sqlplus <apps username>/<apps password> @paxtmsst.sql
   <operating unit id> <incurred by person number> <incurred by
   ```

```
organization name> <1=PTE only; 2=ProjTE only; 3=both>
<starting expenditure ending date> <ending expenditure date>
```

Example: The following command migrates PTE timecards for the Operating Unit ID 458, incurred by Person Number 205, for week ending dates from 28–DEC–1997 through 15–FEB–1998, inclusive:

```
sqlplus <apps username>/<apps password>@paxtmsst.sql 458 205
NULL 1 '28-DEC-1997' '15-FEB-1998'
```

Customizing
Self–Service Time

This chapter describes how to customize your Self–Service Time implementation. It explains how you can modify the appearance and content of application pages, control access to data, and use client extensions to enforce business rules that are specific to your organization.

Customizing Self–Service Time

You can customize Self–Service Time by:

- Controlling Access to Self–Service Time data: page 2–2
- Using the Web Applications Dictionary to modify screen content: page 2–3
- Modifying messages: page 2–6
- Using Client Exensions: page 2–12

Controlling Access to Self–Service Time

You can configure Self–Service Time poplists for projects, tasks, expenditure types, and overriding approvers to meet your requirements. To do this, modify the WHERE clause in the corresponding view listed in this section.

The views control the project and task values that users can download from the View Projects and Tasks link on the Self–Service Time main menu.

Views are associated with the timecard preparer (that is, the person logged into the system). Because these views are used for validation and display, be sure to set up the the view so that the timecard preparer can select the projects for which he is entering hours.

You can customize the following views:

View and Internal Name	Filename of Scripts* and Notes
Project View PA_ONLINE_PROJECTS_V	pavw681.sql * Default allows user to view all projects. Sample code specifies that projects selected must be within the user's organization. Do not modify the base view PA_PROJECTS_EXPEND_V.
Task View PA_ONLINE_TASKS_V	pavw682.sql * Default allows user to view all tasks. Sample code specifies that tasks selected must be within the user's organization. Do not modify the base view PA_TASKS_EXPEND_V.

Table 2 – 1   Views that you can customize (Page 1 of 2)

View and Internal Name	Filename of Scripts* and Notes
Expenditure Type View PA_ONLINE_EXPENDITURE_TYPES_V	pavw742.sql * Default allows user to view all expenditure types. Sample code specifies that users in the Consulting organization (organization_id=1) can enter only transactions of type Straight Time. Do not modify the base view PA_ONLINE_EXPENDITURE_TYPES_V.
Overriding Approver View PA_EXP_OVRRDE_APPROVER_V	pavw685.sql * Default allows user to view all supervisors in the preparer's business group. Sample code specifies that users can only select overriding approvers who belong to the user's organization.

Table 2 – 1   Views that you can customize (Page 2 of 2)

* Scripts are located in the $PA_TOP/patch/115/sql directory. See: Notes on Terminology and File Locations: page 1–2.

Using Web Application Dictionary to Modify Self–Service Time

The Web Applications Dictionary is an Oracle Applications module you can use to configure the content of Self–Service Time web pages. For example, you can change the names of fields and buttons to terminology that is specific to your organization or add text to pages that require additional information.

Changing the Prompt Example

The following table lists regions in Web Application Dictionary that you can use to modify field names in Self–Service Time. The field prompt names are displayed using functions of the Timecards responsibility.

Region ID	Description
PA_WEB_BUTTON	Bottom region of the timecard entry screens and user preferences
PA_WEB_CALENDAR	Calendar window
PA_WEB_CONFIRMATION	Final Review, Save confirmation, and Submit confirmation page; Timecard detail page; workflow notification

Table 2 – 2   Regions in Web Application Dictionary

Region ID	Description
PA_WEB_DETAIL	Enter Hours Detail window
PA_WEB_ERRORS	Timecard error window
PA_WEB_TIME_ENTRY	Time Entry page
PA_WEB_TIME_SPREADSHEET	Disconnected spreadsheet
PA_WEB_TIME_UPLOAD	Upload spreadsheet page
PA_WEB_TOOL_BAR	Top region of the timecard entry screens and user preferences
PA_WEB_USER_PREFERENCE_BODY	User preferences page
PA_WEB_APPR_LOV	Overriding Approver LOV
PA_WEB_PROJECTS_LOV	Projects LOV
PA_WEB_PROJECTS_TASKS_LOV	Tasks LOV and View Projects and Tasks inquiry
PA_WEB_MODIFY_TIMECARD	Modify Timecard inquiry
PA_WEB_TIMECARD_HISTORY	Timecard History inquiry
PA_WEB_UPLOAD_SUMMARY	Upload Summary page

Table 2 – 2   Regions in Web Application Dictionary

▶ **To change the prompt name:**

1. Using the AK Developer Responsibility, navigate to the Regions window.

2. In the Region ID field, query the region you want to modify. For example, to change a prompt name on the Enter Hours page, query PA_WEB_LINES_BODY.

3. Choose Region Items.

4. Scroll to the Long Label column you want to change, and then change the long label. For example, to change a prompt on the Time Entry page, query PA_WEB_TIME_ENTRY.

5. Save your work.

> **Note:** If you update a prompt on one page, be sure to update it on any other pages that use the same prompt.

Changing Display Length in the Enter Hours and User Preferences Windows

You can customize the display length for the attributes in the Enter Hours and User Preference windows. For example, you may want to increase the display length if the values in the lists for the Type field are truncated.

▶ **To modify the display length in the Enter Hours or User Preferences window:**

1. Using the AK Developer Responsibility, navigate to the Regions window.

2. In the Region ID field, query a region:

   • PA_WEB_TIME_ENTRY to make changes in the Enter Hours window

   • PA_WEB_USER_PREFERENCE_BODY to make changes in the User Preferences window

3. Choose Region Items.

4. Scroll to the Display length column next to PA_WEB_EXP_TYPE, and then change the length.

   For example, if you enter 20, the width of the Type field in the window changes to 20 characters.

Changing Widget Size

You can change the size of widgets in the User Preferences, and Time Entry Windows.

Region ID and Description	Region Items
PA_WEB_USER_PREFERENCE_BODY Preferences region	PA_WEB_HEADER_COMMENT PA_WEB_OVERRIDING_APPROVER PA_WEB_PROJECT_NUMBER PA_WEB_TASK_NUMBER PA_WEB_EXP_BODY
PA_WEB_TIME_ENTRY Time Entry window	PA_WEB_HEADER_COMMENT PA_WEB_OVERRIDING_APPROVER PA_WEB_PROJECT_NUMBER PA_WEB_TASK_NUMBER PA_WEB_EXP_TYPE PA_WEB_HOURS

Table 2 – 3   Regions in Web Application Dictionary for Widgits

Customizing Self–Service Time Messages

You can modify the content of any Self–Service Time message using the Application Developer Responsibility in Oracle Applications. Messages include the information that appears in Self–Service Time windows as well as the messages that display in pop–up windows if an error occurs when creating or submitting timecards.

For information about editing messages, see Messages in the online help for Oracle Applications Object Library. For more information about the Message Dictionary Generator, see *Oracle Applications Coding Standards.*

Copy all your custom messages and store them in a directory protected from upgrades. Then use the Message Dictionary Generator (FNDMDGEN) to restore the customized message file.

Client Messages are stored in $PA_TOP/patch/115/import/pat115mg.ldt. To modify server–side messages, use the Oracle Applications Messages window. See: Notes on Terminology and File Locations: page 1–2.

▶ **To customize messages:**

1. Using the Application Developer Responsibility, navigate to the Messages window.

2. In the Name field, query the message to modify.

   Suggestion: To view all Self–Service Time messages, query "PA_WEB%".

3. Make any changes to the message text, then save your work.

   The client messages are shown in Table 2 – 4.

Message Name and When the Message Appears	Default Text
PA_WEB_APPLY_DETAIL Whenever the user changes information on the detail page and the user exits without saving.	Do you want to apply the changes to the Details window?
PA_WEB_BLANK_TYPE When the user tries to apply an alias with an expired expenditure type.	The expenditure type is no longer valid for this week. The value has been blanked out.
PA_WEB_CONFIRM_SAVE Whenever the user chooses Save Timecard.	Confirm that you want to save this timecard. (You can modify it later.)
PA_WEB_CONFIRM_SUBMIT Whenever the user chooses Submit.	Are you sure you want to submit this timecard?

Table 2 – 4   Client Messages (Page 1 of 6)

Message Name and When the Message Appears	Default Text
PA_WEB_DELETE_REMIND_RELOAD When the user deletes a timecard.	To see your changes, wait until the browser displays the Modify Timecard page. Then click the Reload or Refresh button on your browser.
PA_WEB_DFLEX_REQUIRED When the user has not entered a value in one or more descriptive flexfields.	[SEGMENT] is a required field. Enter a value for this field.
PA_WEB_DISC_DATA_ERROR When user enters non–numeric hours in the spreadsheet.	You have entered a non numeric value for hours.
PA_WEB_DISC_ZERO_PROMPTS_FOUND Incorrect setup in a spreadsheet region.	The region is set up incorrectly. Please contact your system administrator.
PA_WEB_DUPLICATE_PROMPT Duplicate prompt in the spreadsheet.	The spreadsheet contains multiple prompts for '[PROMPT]'. The system will use the first value it encounters.
PA_WEB_ENTER_HOURS When the user places the insertion point in an empty hour cell and then selects the Details button.	Please enter hours for the hour cell before opening the detail window.
PA_WEB_ERASE_HOUR When the user changes the week ending date after entering hours in the Enter Hours tab.	Changing the Week Ending date will erase all the hours you have entered. Are you sure you want to continue?
PA_WEB_ERROR_CORRECTION Instruction at the top of the Error Page.	Please correct the following information before you proceed.
PA_WEB_EXIT_TIMECARD When the user clicks on the Menu or Exit button (sphere icon) from any page.	This action will close the current timecard without saving. Are you sure you want to continue?
PA_WEB_FINAL_REVIEW_HEADING Heading on Final Review Page.	Your timecard contains the following information:
PA_WEB_GO_BACK Return to previous page.	Return to Previous Page
PA_WEB_HOUR_ON_WORKDAY Workdays should be changed to view all hours.	A day containing hours is not marked as a work day. Go to the User Preferences (click Preferences on the Enter Hours window), or click the Menu button to go to the main menu and then choose User Preferences) and adjust your work days.
PA_WEB_INVALID_DATE_RANGE When the user enters hours for a date that is inactive for the Expenditure Type.	The date for which you are entering hours is out of the range of dates for that expenditure type.

Table 2 – 4   Client Messages (Page 2 of 6)

Message Name and When the Message Appears	Default Text
PA_WEB_MISSING_PROMPT Required prompt is missing from spreadsheet.	'[PROMPT]' prompt is missing from the spreadsheet. Please contact your system administrator.
PA_WEB_NOTHING_TO_COPY When the user tries to copy from an empty line.	There is nothing to copy.
PA_WEB_NOT_LICENSED Message displayed for unlicensed product.	The system profile option setup indicates that your system is not licensed to run Self–Service Time. Please contact your system administrator and verify the profile option settings.
PA_WEB_NO_ALIAS When the user selects the Apply Alias button but there is no selection in the select box.	You have not defined an alias.
PA_WEB_NO_HOUR When the user selects the Final Review button without entering at least one line of hours.	You have not entered any hours for this week.
PA_WEB_NO_PROJECT During client side validation, display this message for all the Projects that are missing.	Project is missing.
PA_WEB_NO_TASK During client side validation, display this message for all the Tasks that are missing.	Task is missing.
PA_WEB_NUM_FORMAT When the user enters a character or other invalid formats in the hours field.	The hours must be in number format.
PA_WEB_OAPPROVER_NOT_ALLOWED PA: Override Approver profile option is set to No.	Your system does not allow an overriding approver. Your input will be ignored.
PA_WEB_POS_NUM When the user enters a negative number and negative number input is not allowed.	[Number] is negative. Please enter a positive number.
PA_WEB_PROJECT_TASK_INVALID User chooses the Save button but one or more project or task are blank or invalid.	You must enter valid values for the Project and Task fields for each alias.
PA_WEB_REVERSE_OBSOLETE User modifies a timecard after some lines have already been reversed in a different timecard..	Some lines on this timecard were reversed previously. These lines will be deleted when you save or submit.
PA_WEB_SAVE_CONF_HEADING Heading on Save Confirmation Page.	Timecard Number [TCNUMBER] has been saved.

Table 2 – 4   Client Messages (Page 3 of 6)

Message Name and When the Message Appears	Default Text
PA_WEB_SAVE_CONF_INSTRUCTION Instructions to retrieve saved timecards.	You cannot submit saved timecards for approval. Use the Modify Timecard function from the main menu (Welcome window) to continue with the submission process.
PA_WEB_SUBMIT_CONF_HEADING Heading on Submit Confirmation Page.	Timecard Number [TCNUMBER] has been submitted.
PA_WEB_SUBMIT_CONF_INSTRUCTION Instructions on Submit confirmation page.	
PA_WEB_TASK_LOV_NO_PROJECT Prompt user to enter a project number before clicking task LOV.	Please select a project before you select a task.
PA_WEB_UPLOAD_SUMMARY_HEADER Heading on the Upload Summary Page.	Upload Results
PA_WEB_UPLOAD_CANCEL_TIMECARD Alert when the user presses the Cancel button.	Are you sure you want to cancel this timecard?
PA_WEB_UPLOAD_EMPTY_TIMECARD The paste area is empty.	This is not a valid action. Please paste your timecard spreadsheet in the Spreadsheet Upload Area.
PA_WEB_UPLOAD_FORMAT_ERRORS Format or setup errors found in the Spreadsheet during parsing.	The following format errors were found:
PA_WEB_UPLOAD_FORMAT_WARNINGS Format or setup warnings found in the Spreadsheet during parsing.	The following format warnings were found:
PA_WEB_UPLOAD_HEADER Heading on the Upload Timecard Page.	Upload Timecard

Table 2 – 4   Client Messages (Page 4 of 6)

Message Name and When the Message Appears	Default Text
PA_WEB_UPLOAD_INSTRUCTIONS Instructions on Upload Timecard Page.	Instructions Download the timecard spreadsheet. Save a copy to serve as a template for the timecard that you will submit. Open the timecard spreadsheet and track your time in the spreadsheet. Do not enter text in the colored or shaded areas of the spreadsheet. Save the timecard spreadsheet. Highlight the entire report Copy the report (Ctrl–C or choose Edit–Copy from the spreadsheet menu). Click inside the Spreadsheet Upload Area and then paste your timecard (Ctrl–V or choose Edit–Paste from the spreadsheet menu). Click the Validate button.
PA_WEB_UPLOAD_SUMMARY_ERROR Message on Upload Summary Page if validation found errors in timecard.	The timecard processed [NUM_ERRORS] line(s) with errors. Please click the Continue button to proceed.
PA_WEB_UPLOAD_SUMMARY_HEADER Header on Upload Summary Page.	Upload Results
PA_WEB_UPLOAD_SUMMARY_SUCCESS Message on Upload Summary Page if validation succeeded without any errors.	Timecard processed 0 line(s) with errors. Please click the Final Review button to review the timecard.
PA_WEB_UPLOAD_SUMMARY_TITLE Title on Upload Summary Page.	Upload Results
PA_WEB_UPLOAD_TITLE Title on Upload Timecard Page.	Upload Timecard
PA_WEB_USER_PREF_ALIAS_DUP Duplicate alias names exist.	Alias names must be unique.
PA_WEB_USER_PREF_ALIAS_MISSING Alias name missing in a line.	The alias name is missing in this line.
PA_WEB_USER_PREF_CANCEL User chose the Cancel button in the User Preferences window.	Do you want to abandon your changes to User Preferences?
PA_WEB_USER_PREF_HEADER_CHANGE User chooses Save button in User Preferences window after making changes to the header.	The changes you have made will be effective the next time you create a new timecard.
PA_WEB_USER_PREF_NO_WORKDAY Prompt user to check at least one working day.	Please select at least one working day.

Table 2 – 4   Client Messages (Page 5 of 6)

Message Name and When the Message Appears	Default Text
PA_WEB_VERIFY_DELETE Confirm whether the user wants to delete the timecard.	Are you sure you want to delete this timecard?
PA_WEB_VIEW_ONLY_HEADING Heading on View Only page.	Timecard Details
PA_WEB_WEEK_ENDING_INVALID_FMT Format of week ending date in spreadsheet is invalid.	Incorrect Week Ending date: Format not valid.
PA_WEB_WEEK_ENDING_MISMATCH Week ending date in spreadsheet does not correspond to system week ending date.	The week ending date in the spreadsheet is not the same as the system week ending date.
PA_WEB_WEEK_ENDING_NULL Week ending date not supplied in the spreadsheet.	Please enter or correct the week ending date.
PA_WEB_WRONG_FIELD The user is trying to open the Detail window, but the cursor is not at the hour cell.	Please place the text insertion point in the hour cell before you click the Details button.

Table 2 – 4   Client Messages (Page 6 of 6)

Using Client Extensions to Customize Self–Service Time

You can modify the following client extensions to route and approve timecards according to your requirements and to enforce any custom business rules. Client extensions use PL/SQL procedures that Oracle Projects periodically uses when processing timecards. For more information, see: Client Extensions in the *Oracle Projects User Guide.*

You can use the following client extensions with Self–Service Time:

Extension and Reference	Package Body and Package Specification Files	Package and Procedure
Approval: page 2–16	PAXTRT1B.pls PAXTRT1S.pls	PA_CLIENT_EXTN_RTE check_approval
AutoApproval: page 2–13	PAXPTEEB.pls PAXPTEES.pls	PA_CLIENT_EXTN_PTE get_exp_autoapproval
Batch Name Determination: page 2–19	PAPSSTCB.pls PAPSSTCS.pls	PA_TIME_CLIENT_EXTN set_batch_name
Business Message Display: page 2–22	PAPSSTCB.pls PAPSSTCS.pls	PA_TIME_CLIENT_EXTN display_business_message
Custom Default Descriptive Flex Value*: page 2–26	PAPSSDFB.pls PAPSSDFS.pls	PA_CLIENT_EXTN_SST_DFF POPULATEDFLEXDEFAULT
Custom Populate Descriptive Flex Poplist*: page 2–24	PAPSSDFB.pls PAPSSDFS.pls	PA_CLIENT_EXTN_SST_DFF POPULATEFLEXPOPLIST
Matched Status Override: page 2–18	PAPSSTCB.pls PAPSSTCS.pls	PA_TIME_CLIENT_EXTN override_match_status
Routing: page 2–15	PAXTRTEB.pls PAXTRTES.pls	PAROUTINGX route_to_extension
Summary Level Validation: page 2–14	PAXTGTCB.pls PAXTGTCS.pls	PAGTCX summary_validation_extension
Transaction Control: page 2–13	PAXTTCXB.pls PAXTTCXS.pls	PATCX tc_extension

*A poplist displays a list of values

Table 2 – 5   Client Extensions Used with Self–Service Time

The client extensions are called during the following processes:

Entry		Final Review		Submit		
Custom Populate Descriptive Flex Poplist		Transaction Control		All Final Review*		
	Entered	Summary Level Validation	Validated	Matched Status Override	Approved	Transaction Import
Custom Default Descriptive Flex Poplist		Business Message Display		AutoApproval Routing Approval Batch Name Determination		
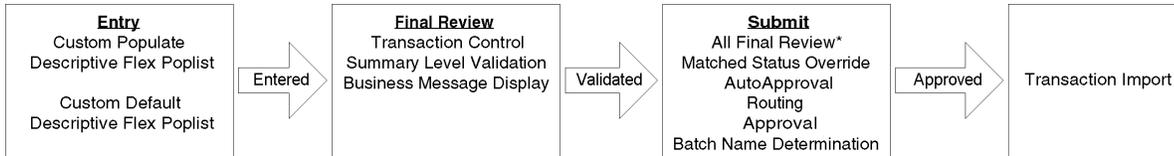
*When the user submits the timecard, the system repeats the Final Review client extensions and validations

Location of Client Extension Files

Print and review the files before modifying an extension. The files are located in the following Oracle Projects directory:

```
$PA_TOP/patch/115/sql
```

See: Notes on Terminology and File Locations: page 1–2.

Oracle Projects Client Extensions

The following client extensions are used by Self–Service Time but are documented elsewhere.

AutoApproval Extension

The default for this extension returns the value of the profile option PA: AutoApprove Timecard. You can configure this extension to meet your needs. For example, you may want timecards to be approved automatically unless they contain overtime. Those with overtime must be routed to the employee's supervisor.

For more information, see the *Oracle Projects User's Guide.*

Transaction Control Extension

Timecard line level validation via Transaction Control extensions allow you to define your own rules to implement company–specific time entry policies for individual time entries.

For more information, see the *Oracle Projects User's Guide.*

Summary–Level Validation Extension

Use the summary–level validation extension to check the validity of one or more items in a submitted expenditure. For example, you could automatically reject any timecard that contains more (or less) than 40 hours.

The extension includes the following items:

Item	Name
Body template	PAXTGTCB.pls
Specification template	PAXTGTCS.pls
Package	PAGTCX
Procedure	summary_validation_extension

Table 2 – 6   Summary–Level Validation Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Summary Validation Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	Identifies the expenditure.
X_incurred_by_person_id	IN	NUMBER	Identifies the employee that submitted the expenditure.
X_expenditure_end_date	IN	DATE	Ending date of the expenditure period.
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure class (OT for timecards).
X_status	OUT	VARCHAR2	Denotes the status of the expenditure (APPROVED or REJECTED). See: About the status Parameter: page 2–15.
X_comment	OUT	VARCHAR2	Comment to be passed back to the employee who submitted the expenditure. Stored as an expenditure routing comment.

Table 2 – 7 Parameters for the Summary–Level Validation Extension

About the status parameter

Use the **status** parameter (**X_status**) to handle error conditions for your procedure. This parameter indicates the processing status of your extension:

x_status = 0	The extension executed successfully.
x_status < 0	An Oracle8 error occurred.
x_status > 0	An application error occurred. Your extension must return an error message code.

Routing Extension

Use the routing extension to set the business rules for routing timecards for approval. For example, timecards that contain overtime could be routed to the project manager of the charged project. By default, this extension returns the immediate supervisor of the employee who created the timecard.

The extension includes the following items:

Item	Name
Body template	PAXTRTEB.pls
Specification template	PAXTRTES.pls
Package	PAROUTINGX
Procedure	route_to_extension

Table 2 – 8   Routing Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Route To Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	System–generated identifier of the expenditure
X_incurred_by_person_id	IN	NUMBER	Identifies the employee who performed the work

Table 2 – 9 Parameters for the Routing Extension

Parameter	Usage	Type	Description
X_expenditure_end_date	IN	DATE	Ending date of the expenditure week
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure type (OT for timecards)
X_previous_approver_person_id	IN	NUMBER	Employee to whom the timecard was previously routed
X_route_to_person_id	OUT	NUMBER	Identifies the employee to whom expenditure is to be routed

Table 2 – 9 Parameters for the Routing Extension

Approval Extension

This extension determines if additional approval is required for the timecard. By default, there is no restriction on approval.

The extension includes the following items:

Item	Name
Body template	PAXTRT1B.pls
Specification template	PAXTRT1S.pls
Package	PA_CLIENT_EXTN_RTE
Procedure	check_approval

Table 2 – 10   Approval Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Check Approval Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
X_expenditure_id	IN	NUMBER	System–generated identifier of the expenditure.
X_incurred_by_person_id	IN	NUMBER	Identifies the employee who performed the work.

Table 2 – 11 Parameters for the Approval Extension

Parameter	Usage	Type	Description
X_expenditure_end_date	IN	DATE	Ending date of the expenditure week.
X_exp_class_code	IN	VARCHAR2	Identifies the expenditure type (OT for timecards).
X_amount	IN	NUMBER	Amount of expenditure in hours.
X_approver_id	IN	NUMBER	Application user ID of employee attempting to approve the expenditure.
X_routed_to_mode	IN	NUMBER	Responsibility of approving employee (either SUPERVISOR or ALL). See: About the routed_to_mode Parameter: page 2–17.
X_status	OUT	VARCHAR2	Status of procedure. See: About the status Parameter: page 2–15.
X_application_id	OUT	NUMBER	Short name of application defined in AOL. (PA for Oracle Projects).
X_message_code	OUT	VARCHAR2	Message code.
X_token_1–5	OUT	VARCHAR2	Message tokens passed back to be used in message.

Table 2 – 11 Parameters for the Approval Extension

About the routed_to_mode Parameter

Depending on the navigation path, the routed_to_mode parameter contains the value SUPERVISOR (Review and Approve) or ALL (Review and Approve All).

You can use this parameter to allow the approver to circumvent the rules enforced by the approval extension. For example, you might want to use this parameter for a supervisor who needs to approve hours regardless of any special logic in your extension.

Matched Status Override Extension

You can set up this extension so that negative entries in Self–Service Time are handled as either:

- Unmatched transactions (corresponding existing positive transaction *not* required)

or

- Matched transactions (corresponding existing positive transactions required)

The system calls the extension for all negative transactions. The default setting marks as "matched" all negative values imported from Self–Service Time. This means importing transactions into Projects causes an error if the Transaction Import process cannot find a matching transaction (for negative transactions that are matched).

You can customize this extension to change the default transaction processing. For example, you may want all negative hours of a given expenditure type imported from Self–Service Time to be Unmatched, as they are used for summarizing negative entries.

The extension includes the following items:

Item	Name
Body template	PAPSSTCB.pls
Specification template	PAPSSTCS.pls
Package	PA_TIME_CLIENT_EXTN
Procedure	override_match_status

Table 2 – 12   Matched Status Override Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Override Match Status Procedure

The procedure contains the default logic to mark as "matched" all negative values imported from Self–Service Time.

The extension uses the following parameters:

Parameter	Usage	Type	Description
P_Person_Id	IN	NUMBER	Employee_ID of the person submitting the timecard.
P_Project_Id	IN	NUMBER	Project Identifier for the item.
P_Task_Id	IN	NUMBER	Task Identifier for the item.
P_Expenditure_Type	IN	VARCHAR2	Expenditure Type of the item.
P_Expenditure_Type_Class	IN	VARCHAR2	Expenditure Type Class of the item.
P_Expenditure_Item_Date	IN	DATE	Date of the item.
P_Quantity	IN	NUMBER	Number of units for the transaction.
P_Expenditure_Comment	IN	VARCHAR2	Item level comment.
P_Attribute_Category	IN	VARCHAR2	Descriptive Flexfield context field.
P_Attribute1–10	IN	VARCHAR2	Descriptive Flexfield Segment
P_Match_Status	IN	VARCHAR2	'U'
P_Match_Status	IN	VARCHAR2	Adjusted_denorm_id
X_Match_Status	OUT	VARCHAR2	Value of 'M' if the item is imported as matched, and 'U' if the item is imported as an unmatched negative.

Table 2 – 13   Matched Staus Override Procedure Parameters (Page 1 of 1)

Batch Name Determination Extension

Use this extension to configure how the system batches timecards before importing them into Oracle Projects. The default logic groups timecards by week ending date and the employee's expenditure organization, but you can group timecards by a method that meets your needs.

The batch name consists of the week ending date concatenated with a number from 0–999. This number is associated with the expenditure organization when the timecard is approved and remains the number associated with that expenditure organization for that week ending date. For the next week ending date, a different number is associated with each organization.

You can configure the Batch Name Determination Extension to group timecards based on any of the IN parameters listed in Table 2 – 16.

Note: Batch names cannot exceed 10 characters.

Example

The first timecard to be approved with week ending date of 01–JAN–99 belongs to an employee in the Consulting expenditure organization. The timecard batch name returned by the default client extension is 010199–0. If the next approved timecard for the same week ending date belongs to a different organization, the timecard is assigned the batch number 010199–1. Each new expenditure organization for a particular week ending date is assigned a new batch name.

Each expenditure organization maintains the same batch name for a particular week ending date. The concatenated numbers are assigned in sequence until all 1000 numbers are assigned. Then, the concatenated numbers are assigned starting again at 0. If you have timecards approved for one week ending date that belong to more than 1000 expenditure organizations, you must modify the default Batch Name Determination Extension.

Table 2 – 14 shows how the extension defaults assign batch names.

Week Ending Date	Expenditure Organization	Order *	Batch Name Associated with the Timecard
01–JAN–1999	Consulting	1	010199–0
01–JAN–1999	Consulting–East	2	010199–1
01–JAN–1999	Consulting–West	3	010199–2
01–JAN–1999	Consulting	4	010199–0
08–JAN–1999	Consulting–East	1	010899–3
08–JAN–1999	Consulting–West	2	010899–4
08–JAN–1999	Consulting	3	010899–5
08–JAN–1999	Consulting	4	010899–5
08–JAN–1999	Consulting–East	5	010899–3

Table 2 – 14   Batch Name Defaults

The extension includes the following items:

Item	Name
Body template	PAPSSTCB.pls
Specification template	PAPSSTCS.pls
Package	PA_TIME_CLIENT_EXTN
Procedure	set_batch_name

Table 2 – 15   Matched Status Override Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Batch Name Determination Procedure

This procedure contains default logic that groups timecards by week ending date and the employee's expenditure organization.

The extension uses the following parameters:

Parameter	Usage	Type	Description
P_Expenditure_Id	IN	NUMBER	System–generated number that uniquely identifies the expenditure.
P_Person_Id	IN	NUMBER	Identifier of the person entering timecard information.
P_Expenditure_Ending_Date	IN	DATE	Period for which time is being entered.
P_Expenditure_Organization_Id	IN	NUMBER	Identifier of the organization that incurred the charges.
X_User_Batch_Name	OUT	VARCHAR2	Ten character name for grouping timecard. All timecards with same batch name are imported into Oracle Projects in the same expenditure group if processed together.
X_Return_Status	OUT	VARCHAR2	Indicates the status of the procedure. Possible values are NULL (Success), 'U' (Unexpected Error), and 'E' (Expected Error).
X_Application_Code	OUT	VARCHAR2	Short name for application defined in Oracle Application Object Library (AOL). 'PA' is defined for Oracle Projects. You can define your own custom application when defining messages so they are retained between upgrades.
X_Message_Code	OUT	VARCHAR2	Message Code. Use this to pass error messages to the calling program. This is NULL for success. Handles errors (return_status = 'E') and is set to the message code defined in AOL. For unexpected error (return status = 'U') it is set to the ORACLE error code (SQLCODE). You may want to pass tokens as part of your message.
X_Token_Name1	OUT	VARCHAR2	Optional parameter provided to construct the message. If this parameter is used, the message text should be constructed with token name equal to the value in this parameter.
X_Token_Val1	OUT	VARCHAR2	Optional parameter provided to construct the message. If this parameter is used, the token used in message text should be populated with the value in this parameter.
X_Token_Name2	OUT	VARCHAR2	Same as X_Token_Name1

Parameter	Usage	Type	Description
X_Token_Val2	OUT	VARCHAR2	Same as X_Token_Val1
X_Token_Name3	OUT	VARCHAR2	Same as X_Token_Name1
X_Token_Val3	OUT	VARCHAR2	Same as X_Token_Val1
X_Token_Name4	OUT	VARCHAR2	Same as X_Token_Name1
X_Token_Val4	OUT	VARCHAR2	Same as X_Token_Val1
X_Token_Name5	OUT	VARCHAR2	Same as X_Token_Name1
X_Token_Val5	OUT	VARCHAR2	Same as X_Token_Val1

Table 2 – 16   Batch Name Determination Procedure Parameters (Page 2 of 2)

Business Message Display Extension

The billable percentage is a calculation of the percentage of the hours in a timecard that are marked as billable. This extension contains an example that returns a message displaying the billable percentage for the timecard (the example is preceded by the comment character). If this example meets your requirements, remove the comment characters from the example code after enabling the profile. This displays the billable percentage message in Self–Service Time.

> **Note:** The example code does not return a message. You must set the profile option PA: Enable Business Message to Yes to see your custom business message as defined in the Business Message Display extension.

The extension includes the following items:

Item	Name
Body template	PAPSSTCB.pls
Specification template	PAPSSTCS.pls
Package	PA_TIME_CLIENT_EXTN
Procedure	display_business_message

Table 2 – 17   Business Message Display Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Business Message Display Procedure

This package contains default logic to return a blank business message.

The extension uses the following parameters:

Parameter	Usage	Type	Description
P_Expenditure_Id	IN	NUMBER	System–generated number that uniquely identifies the expenditure.
P_Person_Id	IN	NUMBER	Identifier of the person entering timecard information.
P_Week_Ending_Date	IN	DATE	Period for which time is being entered.
X_Message_ Application_Name	OUT	VARCHAR2	Short name of the application that ”owns” the message.
X_Msg_Name	OUT	VARCHAR2	Message name
X_Msg_Token1_Name	OUT	VARCHAR2	Name for Token1
X_Msg_Token1_Value	OUT	VARCHAR2	Token for message
X_Msg_Token2_Name	OUT	VARCHAR2	Name for Token2
X_Msg_Token2_Value	OUT	VARCHAR2	Token for message
X_Msg_Token3_Name	OUT	VARCHAR2	Name for Token3
X_Msg_Token3_Value	OUT	VARCHAR2	Token for message
X_Return_Status	OUT	VARCHAR2	Indicates the status of the procedure. Possible values include NULL (Success), ’U’ (Unexpected Error), or ’E’ (Expected Error).
X_Message_Data	OUT	VARCHAR2	Contains the error message if Return_Status is ’U’ or ’E’. Is NULL if Return_Status=NULL.

Table 2 – 18   Business Message Display Procedure Parameters (Page 1 of 1)

Custom Populate Descriptive Flex Poplist Extension

Customize this extension to create poplists that contain values you define. See: Setting Up Descriptive Flexfields: page 1–11.

The extension includes the following items:

Item	Name
Body template	PAPSSDFB.pls
Specification template	PAPSSDFS.pls
Package	PA_CLIENT_EXTN_SST_DFF
Procedure	POPULATEDFLEXPOPLIST

Table 2 – 19   Custom Populate Descriptive Flex Poplist Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Custom Populate Descriptive Flex Poplist Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
P_sContextFieldCode	IN	VARCHAR2	Context Field Values in the Descriptive Flexfields Segments window
P_sSegmentName	IN	VARCHAR2	Window Prompt in the Segments Summary window
p_iEnteredByPersonID	IN	NUMBER(10)	Employee ID of person submitting the timecard
P_sErrorStack	IN	VARCHAR2	Debug string containing the call stack
x_iNumOfPoplistElem	OUT	INTEGER	Number of elements in the poplist
x_arecPoplistValues	OUT	POPLISTVALUE _ARRAY	Contents of the poplist
x_sErrorType	OUT	VARCHAR2	U (Unexpected Error) E (Normal Error) W (Warning) S (No Errors)
x_sErrorStack	OUT	VARCHAR2	Debug string containing the call stack
x_sErrorStage	OUT	VARCHAR2	Debug string describing the location within the body of this procedure
x_sErrorMessage	OUT	VARCHAR2	Error message

Table 2 – 20 Parameters for the Custom Populate Descriptive Flex Poplist Extension

The Poplist Value array data structure is an array of poplistvalue, which is a record:

Attribute	Type	Description
strInternalValue	VARCHAR2(240)	An internal value that is stored in the database
strDisplayValue	VARCHAR2(240)	Text displayed in the poplist

Table 2 – 21 Attributes for poplist value

Custom Default Descriptive Flex Value Extension

Customize this extension to generate custom default values based on the ID of the person submitting the timecard, rather than the default that you defined in the Segments window (Default Value field). See: Set Up Global Descriptive Flexfields: page 1–20.

This extension includes the following items:

Item	Name
Body template	PAPSSDFB.pls
Specification template	PAPSSDFS.pls
Package	PA_CLIENT_EXTN_SST_DFF
Procedure	POPULATEDFLEXDEFAULT

Table 2 – 22   Custom Default Descriptive Flex Poplist Extension

Print and review the files before writing the extension. See: Location of Client Extension Files: page 2–13.

Custom Default Descriptive Flex Value Procedure

The extension uses the following parameters:

Parameter	Usage	Type	Description
P_sContextFieldCode	IN	VARCHAR2	Context Field Values in the Descriptive Flexfields Segments window
P_sSegmentName	IN	VARCHAR2	Window Prompt in the Segments Summary window
p_iEnteredByPersonID	IN	NUMBER(10)	Employee ID of person submitting the timecard
P_sErrorStack	IN	VARCHAR2	Debug string containing the call stack
x_sDefaultValue	OUT	VARCHAR2	Default value for the segment P_sSegmentName in context P_sContextFieldcode
x_sErrorType	OUT	VARCHAR2	U (Unexpected Error) E (Normal Error) W (Warning) S (No Errors)
x_sErrorStack	OUT	VARCHAR2	Debug string containing the call stack
x_sErrorStage	OUT	VARCHAR2	Debug string describing the location within the body of this procedure
x_sErrorMessage	OUT	VARCHAR2	Error message

Table 2 – 23 Parameters for the Custom Default Descriptive Flex Poplist Extension

3

AP Timecard Approval Workflow

This chapter describes the AP Timecard Approval Workflow process and tells you how to implement the workflow.

PA Timecard Approval Workflow

When an employee submits a timecard in Self–Service Time, the Workflow Engine initiates the PA Timecard Approval workflow. This workflow consists of several connected processes that send notifications to managers and employees, ensure timecards adhere to company policy, and check manager approval levels.

You can modify the predefined workflow process by defining any company–specific policies that your business requires.

This section describes the PA Timecard Approval workflow definition.

> **Note:** You can modify some notifications, timeouts, and messages within the workflow. For additional information, refer to the *Oracle Workflow Guide*.

See Also

Summary of the PA Timecard Approval Workflow: page 3–2

Configuring Notifications: page 3–25

Configuring Item Attributes: page 3–27

Configuring Messages: page 3–28

Summary of the PA Timecard Approval Workflow

The PA Timecard Approval workflow is made up of processes, functions, notifications, item attributes, and messages. When an employee submits a timecard in Self–Service Expenses, the default approval process performs the following:

1. Check if timecard is approved automatically (PA: Auto Approve Timesheets = Yes). If it is, the workflow ends with a result of Approved.

2. If the timecard requires approval, the Find Approver function uses business rules you defined during implementation to route the timecard to an approver. By default, the overriding approver is checked first. If no overriding approver is specified, then the approver is found based on the Routing extension. By default, the

routing extension is set to find the employee's supervisor as defined in Human Resources. See: Using Client Extensions to Customize Self–Service Time: page 2–12.

3. If an approver is found, workflow sends the approver a notification requesting review of the timecard and a response. Valid responses include Approved or Rejected. If no approver is found, the process sends a notification to the workflow administrator who resolves the problem so the process can continue.

4. If the response is Approved, the process verifies the approver has the authority to approve the timecard. If not, the timecard is routed for further approval via the Routing extension.

5. The workflow ends when the timecard is either approved or rejected.

The PA Timecard Approval workflow contains the following processes:

- Timecard Approval Top Process: page 3–4
- Approval Process: page 3–6
- Request Approval Process: page 3–12
- No Manager Response Process: page 3–17
- Rejection Process: page 3–20
- Handle Transferred Approval Process: page 3–22

Timecard Approval Top Process

The Timecard Approval Top process is a top level process that contains all of the sub–processes within the PA Timecard Approval workflow. This process has a result type of Approval and can be run as a top–level process. This process is initiated when an employee submits a timecard for approval using Self–Service Time.
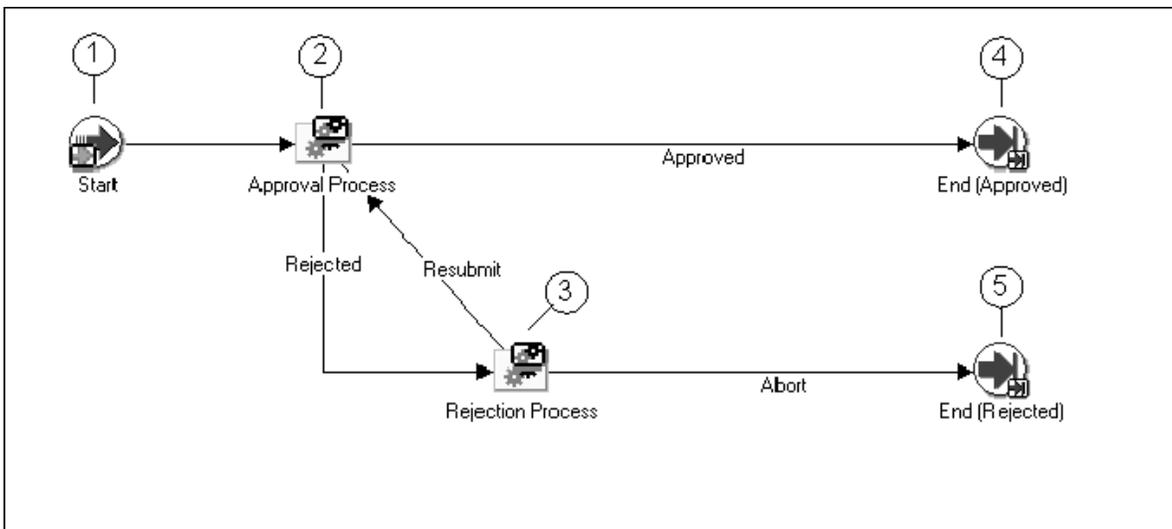

Figure 3 – 1 Timecard Approval Top Process

Timecard Approval Top Process Activities

This section describes each activity in the Timecard Approval Top process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 1.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

Approval Process (Node 2)

This process manages the timecard approval process. If it is approved, the process assigns the timecard a status of Approved and the process ends. See: Approval Process: page 3–6.

If the timecard is rejected, the process transitions to the Rejection process. See: Rejection Process: page 3–20.

Result Type	Approval
Required	Yes
Prerequisite Activities	Start

Rejection Process (Node 3)

This process is called when a manager rejects a timecard. The Rejection process informs the preparer of the rejection via a notification then waits a specified period of time for the preparer to resubmit the timecard for approval. If the preparer does not resubmit the timecard within the period of time specified by the Wait function activity, the process assigns a status of rejected to the timecard and the workflow ends.

See: Rejection Process: page 3–20.

Result Type	PA Timecard Post Rejection Action
Required	No
Prerequisite Activities	Start, Approval Process

End (Nodes 4 and 5)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

Approval Process

The Approval Process is a subprocess of the Timecard Approval Top process and contains activities that manage the approval process. This process includes finding an approver, sending various notifications to both the preparer and approver(s), transferring approval responsibility to another manager (if necessary) and assigning a status of either Approved or Rejected.

This process cannot be initiated as a top–level process; it can only be run as a subprocess when called by another, higher level process (in this case, the Timecard Approval Top process). To view the properties of the Approval process, select the process in the navigator tree, then choose Properties from the Edit menu.
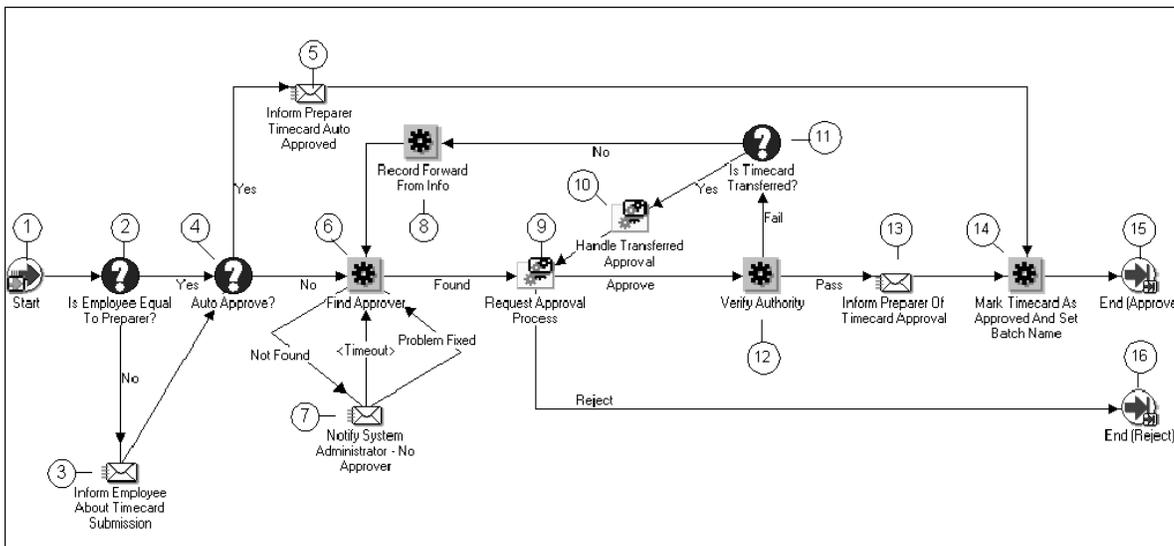

Figure 3 – 2 Approval Process

Approval Process Activities

This section describes each activity in the Approval process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 2.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

Is Employee Equal To Preparer? (Node 2)

This function activity determines whether the preparer submitted the timecard to report her own hours or on behalf of someone else. Employees who can submit timecards for other employees are called *authorized delegates.*

If the timecard is reporting the preparer's hours, the workflow transitions to the Autoapprove function activity. Otherwise, the process sends a notification to the employee whose hours the timecard represents and then transitions to the Autoapprove activity.

Function	PA_SELF_SERVICE_WF_PKG.*EmployeeEqualTo Preparer*
Result Type	Yes/No
Required	Yes
Prerequisite Activities	Start

Inform Employee About Timecard Submission (Node 3)

This activity sends a notification to an employee when an authorized delegate submits a timecard for the employee. The notification contains the employee's name, the preparer's name, the number of hours reported in the timecard, and any comments.

Result Type	None
Message	Inform Employee about Timecard Submission
Required	No
Prerequisite Activities	Start, Is Employee Same as Preparer

AutoApprove (Node 4)

This activity checks the setting of the profile option PA: AutoApprove Timesheets to determine whether the timecard can be approved automatically (see: PA: AutoApprove Timesheets: page 1–10). If the profile option is set to No, the process transitions to the Find Approver activity. Otherwise, the process notifies the preparer that the timecard has been approved, assigns the timecard a status of Approved, and the process ends.

Function	PA_SELF_SERVICE_WF_PKG.*AutoApprove*
Result Type	Yes/No
Required	Yes
Prerequisite Activities	Start, Is Employee Same as Preparer

Inform Preparer Timecard AutoApproved (Node 5)

This activity notifies the person who created the timecard that it was approved automatically.

Message	Inform Preparer Timecard AutoApproved
Result Type	None
Required	No
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove

Find Approver (Node 6)

This function activity identifies the approver for the timecard. If this activity cannot identify an approver, it notifies the system administrator. Otherwise, the process transitions to the Request Approval process: page 3–12.

Function	PA_SELF_SERVICE_WF_PKG.*FindApprover*
Result Type	PA Timecard Approver Search Result
Required	Yes (if AutoApprove returns No)
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove

Notify System Administrator – No Approver (Node 7)

This activity notifies the system administrator when the Find Approver function activity fails to identify an approver for the timecard.   After the system administrator corrects the error and responds by clicking Problem Fixed in the notification, the process transitions to the Request Approval process.

Message	Notify System Administrator – No Approver
Result Type	PA Timecard Problem Fixed Status
Required	No
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver

Record Forward From Info (Node 8)

This function activity records approver information when all of the following are true:

- the timecard is approved

- the approver does not have sufficient authority

- responsibility for approving the timecard has *not* been transferred

Function	PA_SELF_SERVICE_WF_PKG.*RecordForwardFrom Info*
Result Type	PA Timecard Activity Result
Required	No
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process, Verify Authority, Has Timecard Been Transferred

Request Approval Process (Node 9)

This process routes the timecard to approvers for review. See: Request Approval Process: page 3–12.

Result Type	Approval
Required	Yes (if the AutoApprove activity returns No)

Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver

Handle Transferred Approval (Node 10)

This process records information about the new approver when the original approver transfers approval responsibility to another manager. It also notifies the preparer that the original approver was not authorized to approve the timecard and that the timecard was sent to another manager for approval.

Result Type	Approval
Required	Yes if approval was transferred to another manager because the original approver was not authorized to approve the timecard; otherwise, no.
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process, Verify Authority, Has Timecard Been Transferred

Is Timecard Transferred (Node 11)

This function activity checks whether the responsibility for approving the timecard has been transferred to another approver. If approval responsibility was transferred, workflow transitions to the Handle Transferred Approval process. Otherwise, it transitions to the Record Forward From info function activity (Node 8 in Figure 3 – 2).

Function	PA_SELF_SERVICE_WF_PKG.*Transferred*
Result Type	Yes/No
Required	Yes (if Verify Authority function fails; otherwise, no)
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process, Verify Authority

Verify Authority (Node 12)

This function activity determines whether the person who approved the timecard has the proper level of authority to do so. If the approver is authorized to approve the timecard, the process notifies the preparer

that the timecard has been approved. Otherwise, the process checks whether the timecard has been transferred to another approver.

Function	PA_SELF_SERVICE_WF_PKG.*VerifyAuthority*
Result Type	PA Timecard Activity Result (Pass/Fail)
Required	Yes (if the AutoApprove activity returns No)
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process

Inform Preparer of Timecard Approval (Node 13)

This activity notifies the preparer that the timecard has been approved.

Message	Inform Preparer of Timecard Approval
Result Type	None
Required	Yes
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process, Verify Authority

Mark Timecard as Approved and Set Batch Name (Node 14)

This function activity sets the status of the timecard to Approved and assigns a unique batch name to the timecard. This activity is called regardless of whether the timecard is approved manually or automatically.

Function	PA_SELF_SERVICE_WF_PKG.*Approved*
Result Type	None
Required	Yes if timecard is approved; otherwise, no.
Prerequisite Activities	Start, Is Employee Same as Preparer, AutoApprove, Find Approver, Request Approval Process, Verify Authority, Inform Preparer of Timecard Approval

End (Nodes 15 and 16)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

Request Approval Process

The Request Approval process is a subprocess of the Approval process and contains activities that route the timecard for approval. This process sends notifications, requests approval from the specified approver, and – depending on the action taken by the approver – assigns a status of either Approved or Rejected to the timecard.

This process cannot be initiated as a top–level process; it can only be run as a subprocess when called by another, higher level process (in this case, the Approval process). To view the properties of the Request Approval process, select the process in the navigator tree, then choose Properties from the Edit menu.
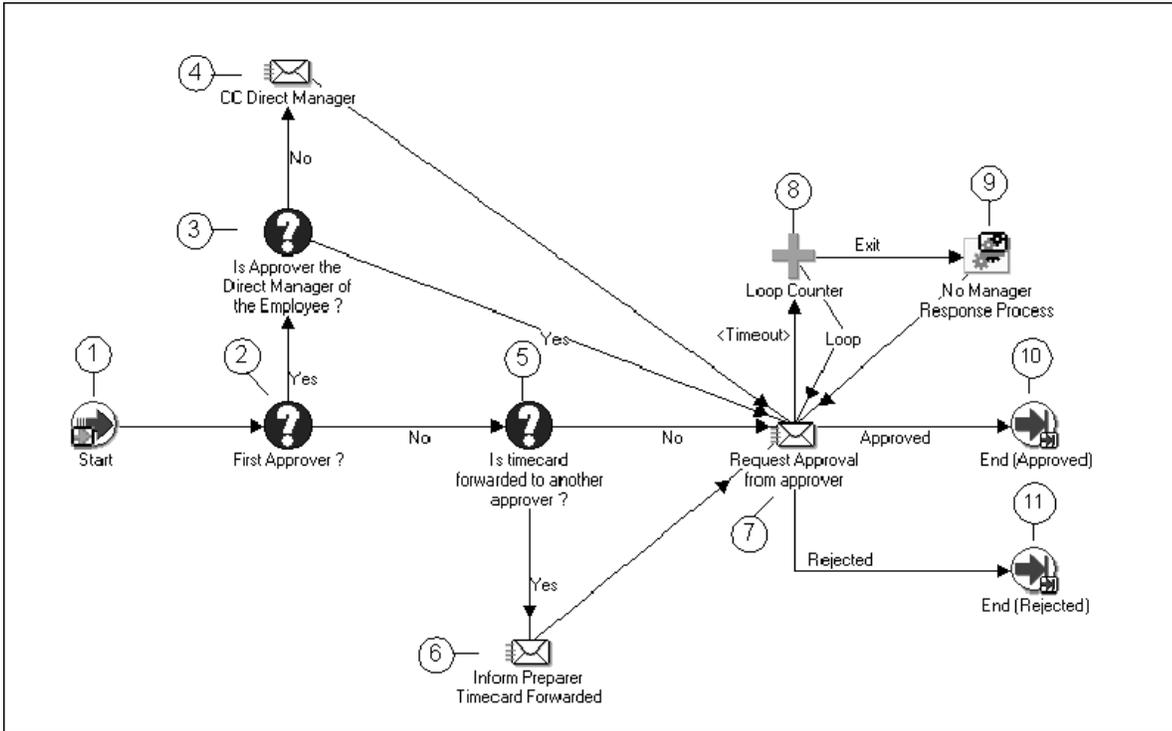
Figure 3 – 3 Request Approval Process

Request Approval Process Activities

This section describes each activity in the Request Approval process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 3.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

First Approver (Node 2)

This function activity determines whether the timecard must be sent to the first approver (for example, the employee's direct manager) or someone with a higher approval limit.

Function	PA_SELF_SERVICE_WF_PKG.*FirstApprover*
Result Type	Yes/No
Required	Yes
Prerequisite Activities	Start

Is Approver the Direct Manager of the Employee (Node 3)

If the First Approver activity returns Yes, this function activity determines whether the approver is the employee's direct manager. If the result is Yes, the process notifies the manager that the timecard is available for review. Otherwise, a "request approval" notification is sent to the approver and the employee's direct manager receives a copy of the notification for informational purposes.

Function	PA_SELF_SERVICE_WF_PKG.*IsApproverManager*
Result Type	Yes/No
Required	Yes if the First Approver activity returns Yes; otherwise, not required.
Prerequisite Activities	Start, First Approver

CC Direct Manager (Node 4)

This activity notifies the preparer's direct manager that the timecard has been sent to another person for approval.

Message	CC Direct Manager
Result Type	None
Required	Yes if timecard is sent to someone other than the preparer's direct manager for approval; otherwise, no.
Prerequisite Activities	Start, First Approver, Is Approver the Direct Manager of the Employee

Is Timecard Forwarded to Another Approver (Node 5)

If the First Approver activity returns No, this function activity determines whether the timecard was forwarded to someone other than the preparer's direct manager for approval.

Function	PA_SELF_SERVICE_WF_PKG.*ApprovalForwarded*
Result Type	Yes/No
Required	Yes if the First Approver activity returns No; otherwise, not required.
Prerequisite Activities	Start, First Approver

Inform Preparer Timecard Forwarded (Node 6)

This activity notifies the preparer when the timecard is forwarded to someone other than the preparer's direct manager for approval.

Message	Inform Preparer Timecard Forwarded
Result Type	None
Required	Yes if timecard is forwarded to another approver; otherwise, no.
Prerequisite Activities	Start, First Approver, Is Timecard Forwarded to Another Approver

Request Approval from Approver (Node 7)

This activity notifies a manager that a timecard requires review.

Message	Request Approval from Approver
Function	PA_SELF_SERVICE_WF_PKG.*SetTransferInfo*
Result Type	Approval
Required	Yes
Prerequisite Activities	Start, First Approver, Is Timecard Forwarded to Another Approver

Loop Counter (Node 8)

This is a standard function activity that limits the number of times the Workflow Engine transitions through the Request Approval From Approver notification activity. You can define how many times the

approver is notified by entering a number for the Loop Limit activity attribute of the Loop Counter activity.

Function	*WF_STANDARD.LOOPCOUNTER*
Result Type	Loop Counter
Required	No
Prerequisite Activities	Start, First Approver

No Manager Response Process (Node 9)

This process notifies the preparer when a manager fails to approve or reject a timecard within a specific period of time. The No Manager Response process also forwards the request to the next approver in the management chain. See: No Manager Response Process: page 3–17.

Result Type	None
Required	No
Prerequisite Activities	Start, First Approver, Is Timecard Forwarded to Another Approver, Request Approval From Approver

End (Nodes 10 and 11)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

No Manager Response Process

The No Manager Response process is a subprocess of the Request Approval process that notifies the preparer when a manager fails to approve or reject a timecard within a specific period of time and then forwards the request to the next approver in the management chain.

This process cannot be initiated as a top–level process; it can only be run as a subprocess when called by another, higher level process (the Request Approval process). To view the properties of the No Manager Response process, select the process in the navigator tree, then choose Properties from the Edit menu.
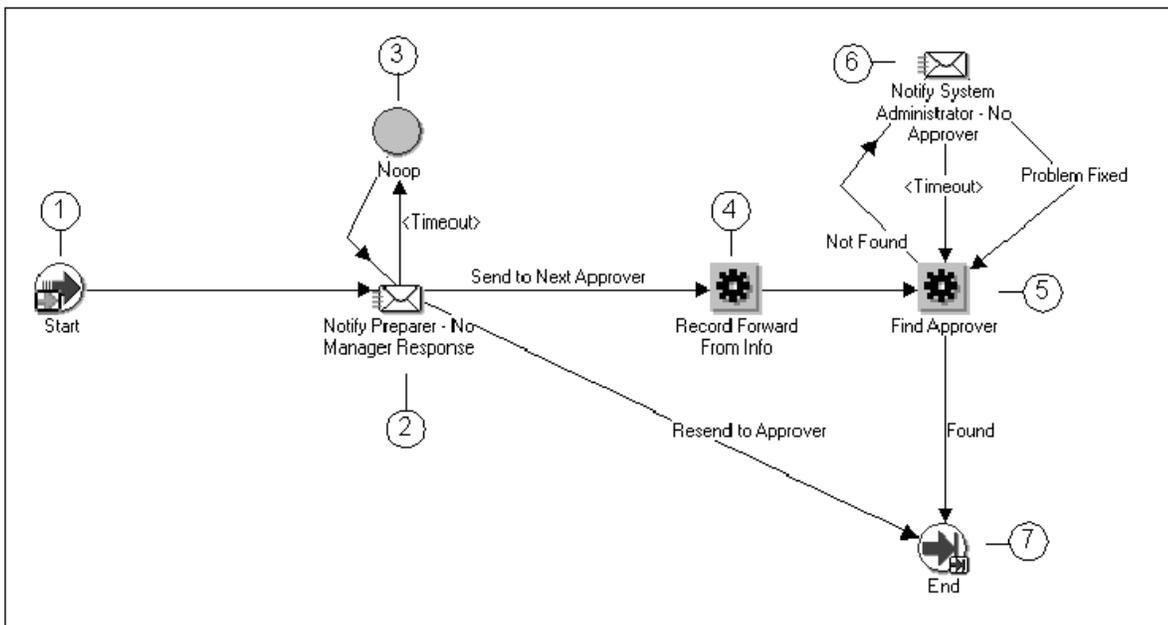
Figure 3 – 4 No Manager Response Process

No Manager Response Process Activities

This section describes each activity in the No Manager Response process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 4.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

Notify Preparer – No Manager Response (Node 2)

This activity notifies the preparer when a manager does not respond to the preparer's request to approve a timecard. This activity also forwards the timecard to the next approver in the management chain.

Message	Notify Preparer – No Manager Response
Result Type	PA Timecard Approval Selection
Required	Yes
Prerequisite Activities	Start

Noop (Node 3)

This is a standard function activity that acts as a placeholder. It performs no action.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	No
Prerequisite Activities	Start, Notify Preparer – No Manager Response

Record Forward From Info (Node 4)

This function activity records information about the original approver when that approver fails to respond to the Request Approval notification and then transitions to the Find Approver activity.

Function	PA_SELF_SERVICE_WF_PKG.*RecordForwardFrom Info*
Result Type	None
Required	Yes
Prerequisite Activities	Start, Notify Preparer – No Manager Response

Find Approver (Node 5)

This function activity determines to which manager to forward the timecard when the original approver fails to respond to the Request Approval from Approver notification.

Function	PA_SELF_SERVICE_WF_PKG.*FindApprover*
Result Type	PA Timecard Approver Search Result
Required	Yes
Prerequisite Activities	Start, Notify Preparer – No Manager Response, Record Forward From Info

Notify System Administrator – No Approver (Node 6)

This activity notifies the system administrator when an approver for the timecard cannot be found. When the system administrator responds by choosing Problem Fixed in the notification, the process continues.

Message	Notify System Administrator – No Approver
Result Type	PA Timecard Problem Fixed Status
Required	Yes
Prerequisite Activities	Start, Notify Preparer – No Manager Response, Record Forward From Info, Find Approver

End (Node 7)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

Rejection Process

The Rejection Response process is a subprocess of the Timecard Approval Top process that notifies the preparer when a timecard is rejected and sets the status of the timecard to Rejected.

This process cannot be initiated as a top–level process; it can only be run as a subprocess when called by another, higher level process (the Timecard Approval Top process). To view the properties of the Rejection process, select the process in the navigator tree, then choose Properties from the Edit menu.
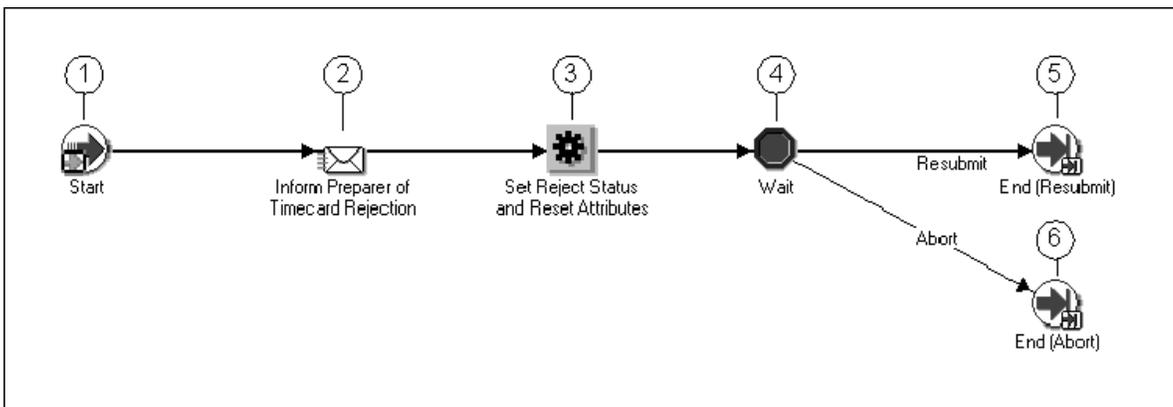

Figure 3 – 5 Rejection Process

Rejection Process Activities

This section describes each activity in the No Manager Response process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 5.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

Inform Preparer of Timecard Rejection (Node 2)

This activity notifies the preparer when a timecard is rejected.

Message   Inform Preparer of Timecard Rejection

Result Type   None

Required   Yes

Prerequisite   Start
Activities

Set Reject Status and Reset Attributes (Node 3)

This function activity sets the status of the timecard to Rejected and
resets all other associated attributes.

Function   PA_SELF_SERVICE_WF_PKG.*Rejected*

Result Type   None

Required   Yes

Prerequisite   Start, Inform Preparer of Timecard Rejection
Activities

Wait (Node 4)

This is a standard function activity that pauses the Rejection process
until the employee fixes and resubmits the timecard for approval. If a
rejected timecard is not resubmitted before this activity "times out," the
process transitions to the Delete Expense Report From Interface Tables
activity.

You can specify any combination of days, hours, and minutes before
this activity times out. For example, you can specify that employees
have thirty days to resubmit a rejected timecard before it is deleted
from the system.

To specify a timeout for the Wait function activity:

1. View the properties for the activity.

2. Select the Node tab.

3. Choose a Timeout period of Relative Time, then specify a number
    of days, hours, and minutes.

4. Save your work.

Function   WF_STANDARD.BLOCK

Result Type	PA Timecard Post Rejection Action
Required	Yes
Prerequisite Activities	Start, Inform Preparer of Timecard Rejection, Set Reject Status and Reset Attributes

End (Nodes 5 and 6)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

Handle Transferred Approval Process

The Handle Transferred Approval process is a subprocess of the Approval process and is called when an approver transfers responsibility for approving a timecard to another manager. The process also notifies the original approver if the new approver does not have authority to approve the timecard.

This process cannot be initiated as a top–level process; it can only be run as a subprocess when called by another, higher level process (the Approval process). To view the properties of the Handle Transferred Approval process, select the process in the navigator tree, then choose Properties from the Edit menu.
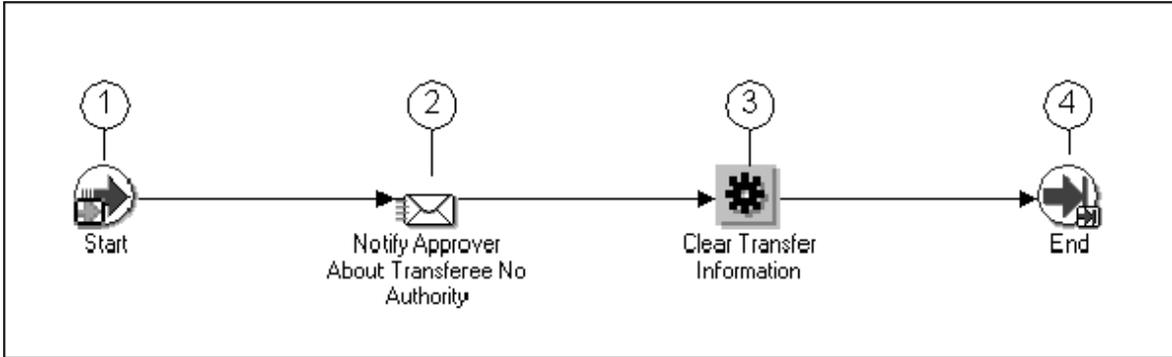
Figure 3 – 6 Handle Transferred Approval Process

Handle Transferred Approval Process Activities

This section describes each activity in the Handle Transferred Approval process, listed by the activity's display name. Each node corresponds to the workflow icons that appear in Figure 3 – 6.

Start (Node 1)

This standard function activity simply marks the start of the process.

Function	*WF_STANDARD.NOOP*
Result Type	None
Required	Yes
Prerequisite Activities	None

Notify Approver About Transferee No Authority (Node 2)

This activity notifies the original approver that the person to whom approval responsibility was transferred is not authorized to approve the timecard.

Message	Notify Approver About Transferee No Authority
Result Type	None
Required	Yes
Prerequisite Activities	Start

Clear Transfer Information (Node 3)

This function clears all transfer information before the original approver receives the Transferee No Authority notification (Node 2).

Function	PA_SELF_SERVICE_WF_PKG.*ClearTransferInfo*
Result Type	None
Required	Yes
Prerequisite Activities	Start, Notify Approver About Transferee No Authority

End (Node 4)

This standard function activity simply marks the end of the process. Although the activity itself does not have a result type, each node of this activity in the process must have a process result assigned to it. The process result is assigned in the property page of the activity node.

Function	*WF_STANDARD.NOOP*
Result Type	None
Prerequisite Activities	Start

See Also

Configuring Notifications: page 3–25

Configuring Item Attributes: page 3–27

Configuring Messages: page 3–28

Configuring Notifications

Table 3 – 1 summarizes the Self–Service Time workflow notifications. To specify timeout values, see: Defining Timeouts: page 3–26.

Name	Internal Name and Description	Customizable?	Default
Inform employee about timecard submission	NTFY_TIMECARD_SUBMITTED Notifies an employee when someone else submits timecard on their behalf Does not require employee action.	No	
CC Direct Manager	NTFY_DIRECT_MANAGER This notification is sent when the approver is not the employee's direct manager. It notifies the direct manager that employee submitted a timecard.	No	
Notify Preparer – No Approver Response	NTFY_NO_RESPONSE If the preparer doesn't respond to the No approver response notification (by sending to the next approver or resending to approver within the timeout period), the preparer is notified again.	No (Timeout)	
Inform Preparer of Timecard Approval	NTFY_TCARD_APPROVED This notification is sent when timecard is approved by approver. Does not require employee action.	No	
Inform Preparer of Timecard Rejection	NTFY_TCARD_REJECTED This notification is sent when a timecard is rejected by an approver. Does not require employee action.	No	
Inform Preparer Timecard Forwarded	NOTIFY_TCARD_FORWARDED This notification is sent when a timecard is routed from one approver to another. Does not require employee action.	No	
Inform Preparer Timecard Autoapproved	NTFY_TCARD_AUTO_ APPROVED Informs the preparer that the timecard was approved automatically	No	
Notify System Administrator – No Approver	NTFY_NO_APPROVER_FOUND This notification is sent when no approver is found. After the timeout period, it attempts to find next approver.	No	

Table 3 – 1   Workflow Notifications (Page 1 of 2)

Name	Internal Name and Description	Customizable?	Default
Request Approval From Approver	NTFY_APPROVER This notification is sent to the approver for approval/rejection.	No	
Notify Approver Transferee Not Authorized to Approve	NTFY_TRANSFEREE_NOT_ AUTHORIZED Informs the preparer that the person to whom the timecard was transferred is not authorized to approve it.	No	

Table 3 – 1   Workflow Notifications (Page 2 of 2)

Defining Timeouts

You can specify the period of time that must pass before a notification activity times out. Following are the timeouts you can modify:

- Timeout After No System Administrator Response
- Timeout After No Approver Response
- Timeout After No Preparer Response

▶ **To define a timeout:**

1. In the Workflow Builder, open the database (File > Open).

2. Open the PA Timecard Approval workflow file.

3. Expand the Attributes branch, then select the timeout to modify.

4. In the Default Value field, enter a number of minutes for the timeout. For example, to set a timeout of five days, set the Default Value to 7200 (one day = 1440 minutes, therefore 5 x 1440 = 7200).

5. Choose Apply to save your work.

Configuring Item Attributes

You can configure the following item attributes:

- **Notify Resend Limit** sets the maximum number of times the notification Request Approval from Approver is resent if there is no response from the approver. The default value is 3.

- **Workflow Administrator** specifies who receives a notification if no approver is found during the workflow process.

▶ **To set the Notify Resend Limit item attribute:**

1. In the Workflow Builder, open the database (File > Open).

2. If not already loaded, move PA Timecard Approval from the Hidden window to the visible window. Click OK.

3. Expand PA Timecard Approval.

4. Expand Attributes.

5. Click Notification Resend Limit.

6. Select the Details tab.

7. Enter the timeout period in days, hours, and minutes.

▶ **To configure Workflow Administrator item attribute:**

1. In the Workflow Builder, open the database (File > Open).

2. Load Roles from Database (Find > Load Roles From Database). Click the Find button and enter the name of your workflow administrator. Click OK.

3. Move PA Timecard Approval from the Hidden window to the visible window. Click OK.

4. Expand PA Timecard Approval.

5. Expand Attributes.

6. Click System Administrator.

7. In the Default Value field, select the person from the poplists. Click OK, and then choose File > Save.

Configuring Messages

You can change the body of workflow messages. However, you cannot create additional attributes.

▶   **To change the message body:**

1.   In the Workflow Builder, open the database (File > Open).

2.   If not already loaded, move PA Timecard Approval from the Hidden window to the visible window. Click OK.

3.   Expand PA Timecard Approval.

4.   Expand the Messages branch.

5.   Select a message.

6.   Select the body tab.

7.   Change the text as needed.

For example, you can change the message body from

This timecard was submitted to &APPROVER_DISP_NAME for approval.

to

Self–Service Time sent the timecard you submitted to &APPROVER_DISP_NAME for approval.

Index

D

dates, ICX: Date Format Mask profile option, 1−7

descriptive flexfields
Custom Default Descriptive Flex Value Client Extension, 2−26
setting up, 1−11

E

employees, setting up, 1−4

expenditure cycle start day, setting up, 1−15

F

flexfields
Custom Default Descriptive Flex Value Extension, 2−26
Custom Populate Descriptive Flex Poplist Extension, 2−24
customizing flexfield routines, 1−14
setting up global descriptive flexfields in the Timecard Spreadsheet, 1−20

G

Global Descriptive Flexfields, setting up in the Timecard Spreadsheet, 1−20

I

importing transactions, from Self−Service Time to Oracle Projects, 1−25

interfaces
Self−Service Time to Oracle Projects, 1−25
Transaction Import, 1−25

items, configuring item attributes, 3−27

L

language, ICX: Language profile option, 1−7

M

messages
Business Message Display Extension, 2−22
customizing, 3−28
modifying Self−Service Time messages, 2−6
PA Time: Enable Business Message profile option, 1−9

N

notifications, configuring notifications, 3−25

numbers, PA Time: Timecard Number Prefix, 1−8

O

operating unit, MO: Operating Unit profile option, 1−10

Oracle Projects
client extensions, 2−13
importing negative transactions from Self−Service Time to Projects, 1−25
importing rejected, unmatched transactions from Self−Service Time to Projects, 1−25
importing transactions from Self−Service Time to Projects, 1−25
integrating Self−Service Time and Oracle Projects, 1−25

P

PA Timecard Approval workflow, overview, 3−2

Personal Time and Expense (PTE), migrating data to PTE, 1−27

profile options
ICX: Date Format Mask, 1−7

ICX: Language, 1−7
ICX: Limit Connect, 1−7
ICX: Limit Session Time, 1−8
MO: Operating Unit, 1−10
PA Time: Allow Entry of Negative Hours, 1−8
PA Time: Enable Business Message, 1−9
PA Time: Licensed, 1−10
PA Time: Timecard Number Prefix, 1−8
PA: AutoApprove Timesheets, 1−10
PA: Override Approver, 1−8
setting up, 1−5

Project Time and Expense (ProjTE), migrating
data to ProjTE, 1−27

R

reject, Timecard Rejection workflow process,
3−20

responsibilities
assigning Self−Service Time and Workflow
responsibilities, 1−4
setting up, 1−3

S

security, controlling access to Self−Service
Time, 2−2

setting up
charge controls, 1−15
descriptive flexfields, 1−11
employees, 1−4
item attributes, 3−27
messages, 3−28
profile options, 1−5
responsibilities and automatic approval, 1−3
Self−Service Time, 1−2
Timecard Spreadsheet, 1−16
timeouts, 3−26

T

Timecard Spreadsheet
changing cell prompts, 1−20
changing the week ending day, 1−18
creating cell links, 1−19
formatting the week ending day, 1−17
setting up, 1−16
setting up global descriptive flexfields, 1−20

timecards
Request Approval workflow process, 3−12
Timecard Approval Top workflow process,
3−4
timecard number prefix profile option, 1−8

timeouts, defining, 3−26

Transaction Control, client extension, 2−13

Transaction Import, definition and use, 1−25

transactions
adjusting transactions imported from
Self−Service Time in Oracle Projects,
1−26
importing from Self−Service Time to Oracle
Projects, 1−25

V

validation, Summary−Level Validation
Extension, 2−14

W

Web Applications Dictionary, customizing
Self−Service Time, 2−3

week ending day
changing in the Timecard Spreadsheet, 1−18
formatting in the Timecard Spreadsheet, 1−17
setting up, 1−15

workflow activity descriptions
Approval process activities, 3−6
Handle Transferred Approval process
activities, 3−23

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