



PeopleSoft v9.2 HCM

Instructor Demonstration Agenda

Absence Management

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PeopleSoft HCM Instructor Demonstration Agenda

Purpose: This instructor demonstration provides a high-level overview of design, configuration and set-up aspects of the Absence Management module in PeopleSoft HCM.

Absence Management (2 Days)

Day 1*:

9:00 – 12:00

Course Overview (Lesson 1)

- Agenda

Business Process Overview (Lesson 2)

- Describing Absence Management Features
- Describing Integration with Other Applications
- Describing Absence Terminology
- Describing Elements
- Describing the Organizational, Processing, and Calendar Frameworks
- Describing Setup and Processing Steps
- Describing Sources of Information About Absence Management

Creating Schedules (Lesson 3)

- Describing the Use of Schedules
- Explaining Schedule Groups
- Creating Work Schedules
- Validating Schedule Changes
- Describing Holiday Schedules
- Explaining Methods of Assigning Work Schedules

Defining Common Characteristics of Elements (Lesson 4)

- Explaining Elements Categories
- Defining Basic Element Parameters

Defining Absence Entitlement Elements (Lesson 5)

- Describing Entitlement Accrual
- Creating Absence Entitlement Elements
- Modifying Entitlement Balance Accumulators

12:00 – 1:00 Lunch Break

1:00 – 4:00

Defining Absence Take Elements (Lesson 6)

- Explaining Absence Types and Reasons
- Describing Absence Take Elements
- Creating Absence Take Elements
- Describing Absence Setup Guidelines

Setting Up Supporting Elements (Lesson 7)

- ✔ Describing System Elements
- ✔ Creating Variable Elements
- ✔ Describing Date Elements
- ✔ Defining Duration Elements
- ✔ Creating Formula Elements
- ✔ Describing Operators Used in Formulas
- ✔ Explaining Elements Used to Look Up Values
- ✔ Creating Brackets

Defining the Organizational Framework (Lesson 8)

- ✔ Describing the Organizational Framework
- ✔ Defining Element Groups
- ✔ Defining Eligibility Groups
- ✔ Defining Pay Entities
- ✔ Defining Pay Groups
- ✔ Mapping Pay Groups

Defining the Processing Framework (Lesson 9)

- ✔ Describing the Processing Framework
- ✔ Defining Sections
- ✔ Defining Process Lists

**There will be a 10 minute break in the morning and afternoon at instructor discretion.*

Day 2*:

9:00 – 12:00

Setting Up Calendars (Lesson 10)

- ✔ Describing Calendar Concepts
- ✔ Defining Run Types
- ✔ Defining Periods
- ✔ Defining Calendars
- ✔ Defining Calendar Groups

Managing Payee Data (Lesson 11)

- ✔ Explaining Integration with PeopleSoft Human Resources
- ✔ Viewing Payee Data

Entering and Processing Absences (Lesson 12)

- ✔ Entering Absence Events
- ✔ Explaining Entitlement and Take Processing
- ✔ Running the Absence Process
- ✔ Describing the Processing Phases and Options
- ✔ Viewing Processing Results

Overriding Supporting Elements (Lesson 15)

- ✔ Listing the Types of Supporting Elements that You Can Override
- ✔ Explaining Where to Create Supporting Element Overrides
- ✔ Explaining the Element Override Hierarchy

Adjusting Frequency-Based Entitlement (Lesson 16)

- Describing Methods for Adjusting Frequency-Based Entitlement
- Adjusting a Payee's Frequency-Based Entitlement Balance
- Overriding the Definition of a Frequency-Based Entitlement

Defining Absence-Based Entitlements and Takes (Lesson 18)

- Defining Absence-Based Entitlement Elements
- Defining Take Elements with Absence-Based Entitlement
- Describing How to Link Related Absences
- Adjusting Absence-Based Entitlement

12:00 – 1:00 Lunch Break

1:00 – 4:00

Implementing Absence Take Features (Lesson 19)

- Defining Qualifying Periods for Using Entitlement
- Defining Rules for Negative Entitlement Balances
- Using Mapping to Generate Absence Data for Two Take Elements
- Explaining How to Store Data in User Defined Fields

Defining Forecasting and Balance Inquiry Processes (Lesson 20)

- Explaining Forecasting and Balance Inquiry
- Setting Up Forecasting and Balance Inquiry Processing
- Forecasting an Absence Event
- Viewing Absence Balances

Implementing Segmentation (Lesson 22)

- Defining Segmentation Terminology
- Explaining Types of Segmentation
- Setting Up Segmentation
- Viewing, Adding, and Canceling Segmentation Triggers
- Describing General Rules for Segmentation Processing
- Explaining Proration

Course Review (Lesson 28)

- Describing the Purpose of Elements
- Creating Organizational, Processing, and Calendar Frameworks
- Building Rules for Tracking Absences and Accrued Time Off
- Creating and Assigning Work Schedules
- Entering Absences and Forecasting Entitlement
- Processing Absences and Viewing the Results
- Adjusting Entitlement Balances
- Sending Absence Data to Your Payroll System
- Describing Self-Service Absence Functionality
- Working With Approvals and Delegations

**There will be a 10 minute break in the morning and afternoon at instructor discretion.*