(20D) Oracle HCM Cloud: Canadian Payroll

Oracle Global Human Resources Cloud

DURATION	MODULES	COURSE CODE
5 Days	**31 Lectures**	**—**

Course Overview

Learn To: Set up payroll business definitions and pay frequencies Define payroll elements for earnings and deductions Perform functional tasks, like creating element entries and calculating payroll Define payment methods for your organization, employees, and third-parties Set up the costing of elements Test your setup by entering data and running common payroll processes and reports

What You Will Learn

Oracle HCM Cloud: Canadian Payroll Course Overview

- Lesson Objectives
- Course Objectives
- Course Agenda
- Information Resources

Canadian Payroll Overview

- Learning Objectives
- Oracle Human Capital Management
- Canadian Payroll Overview
- Payroll Processing Overview
- Data Loading Overview
- Oracle Payroll Country Extensions
- Accessing Payroll
- Accessing Payroll Quick Actions
- Employee Payroll Self Service
- Instructor Demonstration
- Summary
- Practices

Auditing Payroll Business Objects

- Learning Objective
- Who Does What
- Setting It Up
- What Does it Look Like
- Show Attribute Details
- Instructor Demonstration
- Summary

Geographies

- Learning Objective
- Defining Geographies Overview
- Managing Geographies
- Loading Geographies for Canada
- Instructor Demonstration
- Summary

Jurisdictions and Legal Authorities for HCM

- Learning Objectives
- Jurisdictions
- Predefined Jurisdictions
- Legal Authorities
- Instructor Demonstration
- Summary

Enterprise Structures

- Learning Objectives
- Enterprise Structures Overview
- Enterprise Structures Terminology
- Global Enterprise Structure Model: Organizational Model
- Legislative Data Group Overview
- Legislative Data Groups And Payroll
- Tax Reporting Unit Support for Global Transfers
- Legal Entity Overview
- Legal Entity Example
- Legal Entities for HCM
- Managing Legal Entity HCM Information
- Instructor Demonstration
- Summary
- Practices

Legal Reporting Units for HCM

- Learning Objectives
- Managing Legal Reporting Unit HCM Information
- Legal Reporting Unit Calculation Cards
- Calculation Rules for Tax Reporting
- Features by Country or Territory
- Features by Country or Territory Example
- Instructor Demonstration
- Summary

Lookups, Value Sets, And Flexfields

- Learning Objectives
- Common Lookups
- Payroll Lookups
- Value Sets
- Payroll Descriptive Flexfields
- Instructor Demonstration
- Summary
- Practices

Person Records

- Learning Objectives
- People Are Important
- Assignments
- Employees Want to Get Paid
- What’s Your Status
- Find Your Information
- Instructor Demonstration
- Summary

Bank Accounts And Organizational Payment Methods

- Learning Objectives
- Payment Methods Prerequisites
- Financials Setup
- Banks, Branches, And Bank Accounts
- Bank Security
- Organization Payment Method Overview
- Organization Payment Method Uses
- Organization Payment Method Components
- Payment Sources
- Payment Method Rules
- Payment Method Rules Examples
- Instructor Demonstration

- Summary
- Practices

Pay Frequencies

- Learning Objectives
- Global Enterprise Structure Model: Processing Configuration
- Consolidation Groups
- Payroll Definitions Overview
- Create Payroll Definitions: Basic Details Page
- Time Definitions
- Run Types
- Transfer of a Worker’s Payroll During Global Transfer
- Instructor Demonstration
- Summary
- Practices

Payroll Earning Elements

- Learning Objectives
- Elements Overview
- Element Component Example
- Elements And The Payroll Employment Model
- Element Classifications
- Primary Classifications
- Secondary Classifications
- Subclassifications
- Predefined Elements
- Element Templates
- Element Template Sections
- Currency
- Durations
- Standard Rules
- Calculation Rules
- Special Rules
- Element Creation Through Scheduled Processes
- Elements
- Input Values
- Managing Rules
- Balancing Feeds
- Related Formulas, Elements, And Balances
- Instructor Demonstration
- Summary
- Practices

Payroll Deduction Elements

- Learning Objectives
- Payroll Deductions Overview
- Deduction Components Example
- Component Groups Categories
- Component Group Category Details
- Involuntary Deduction Element
- Involuntary Deduction Element Creation
- Managing Calculation Value Definitions
- Automatic End Date on Deduction Element Entries
- Loading Payroll Tax Information for Canada
- Managing Payroll Calculation Information
- Component Group Rules
- Component Group Rules Example
- Instructor Demonstration
- Summary
- Practices

Element Entries

- Learning Objectives
- Element Entries Overview
- Element Entry Methods
- Manual Entry
- Bulk Entry
- Automatic Entry
- Instructor Demonstration
- Summary
- Practices

Bulk Loading Data

- Lesson Objectives
- Importing Data: Key Data Loaders
- Bulk Loading And Maintaining Payroll Data
- HCM Data Loader Overview
- HCM Data Loader Key Features
- HCM Data Loader User Interfaces
- HCM Spreadsheet Data Loader Considerations
- HCM Spreadsheet Data Loader Overview
- HCM Spreadsheet Data Loader: What It Does
- HCM Spreadsheet Data Loader Prerequisites
- HCM Spreadsheet Data Loader Advantages
- Spreadsheet Restrictions
- HCM Spreadsheet Data Loader: Process Summary
- Instructor Demonstration

- Summary

Fast Formulas

- Objectives
- User-Defined Tables Overview
- User-Defined Table Match Example
- User-Defined Table Range of Values Example
- Fast Formula Overview
- Fast Formula Types
- Creating Fast Formulas
- Ways to Create Fast Formulas
- Fast Formula Components
- Variables
- Assignment Statements
- Return Statements
- Input Statements
- Expressions
- Operators
- Conditions
- Comments
- Database Items
- Flexfield Database Items
- Functions
- Fast Formula Validation
- Instructor Demonstration
- Summary
- Practices

Balance Definitions

- Learning Objectives
- Balance Definitions
- Balance Feeds by Input Values
- Balance Feeds by Element Classifications
- Balance Feeds by Elements and Element Classifications
- Balance Feeds by Single Element
- Balance Dimensions
- Generated Balances and Database Items
- Balance Initialization
- Balance Exceptions and Exception Reports
- Balance Groups
- Balance Group Usages
- Balance Group Extract Definition Reporting
- Instructor Demonstration
- Summary
- Practices

Calculate Payroll

- Learning Objectives
- Calculating Payroll: Overview
- Payroll Dashboard
- How Payroll Results Are Processed
- Calculate Payroll
- Additional Ways to Calculate Payroll
- Parameters for Calculating Payroll
- Flow Interaction
- Flow Schedules
- Verify Results
- Reporting of Units Other Than Time
- Instructor Demonstration
- Summary
- Practices

Error Corrections

- Lesson Objectives
- Payroll Corrections
- Mark for Retry And Retry
- Rollback And Reversal
- Roll Back Errors Rule for Payroll Flows
- Element Entry Rollback
- Payment Corrections
- Void Payments
- Processing Bank Corrections
- Managing Corrections in a Checklist
- When Actions Are Available For Selection
- Instructor Demonstrations
- Summary
- Practices

QuickPay

- Lesson Objectives
- QuickPay
- Calculate QuickPay
- Corrections Using QuickPay
- Statement of Earnings Summary
- View Process Results
- QuickPay: Scope of Corrections
- Make External Payments
- Calculate QuickPay Methods
- Instructor Demonstration
- Summary

- Practices

Proration Event Groups

- Learning Objectives
- Payroll Event Groups Overview
- Proration Setup Example
- Proration Event Groups
- Adding Qualifiers
- Proration Configuration Steps
- Adding Proration Event Group to an Element
- Proration Event Group to an Element Example
- Proration Rules
- Work Schedules Used in Proration
- Rules for Work Schedules Used in Proration
- Instructor Demonstration
- Summary

Retroactive Event Groups

- Learning Objectives
- Retroactive Event Groups
- Adding Retroactive Event Group to an Element
- Late Hires
- Retroactive Setup Example
- Retroactive Notification Report
- Event Notifications
- Instructor Demonstration
- Summary

Personal Payment Methods

- Learning Objectives
- Banks, Branches, And Bank Accounts
- Who Can Create Banks And Branches
- Personal Payment Methods Overview
- Splitting Up Payments
- Personal Payment Method Processes
- Configuring Payment Method Preferences
- Instructor Demonstration
- Summary
- Practice

Third-Party Payment Methods

- Learning Objectives
- Third-Party Payments
- Third Parties and Third-Party Organization Payment Methods

- Third Parties
- Party Usage Codes
- Party Usage Codes Defined
- More Party Usage Codes Defined
- Third-Party Organization Payment Methods
- Instructor Demonstration
- Summary
- Practice

Calculation Cards

- Learning Objectives
- Calculation Cards
- Types of Calculation Cards
- Additional Types of Calculation Cards
- Classifications
- Calculation Components
- Canadian Involuntary Deduction Data Values
- Instructor Demonstration
- Summary
- Practice

Payroll Costing

- Learning Objectives
- Payroll Costing Overview
- Payroll Costing Setup Prerequisites
- Cost Allocation Key Flexfield Overview
- Cost Allocation Key Flexfield Example
- Cost Allocation Key Flexfield Setup
- Value Set Setup
- Cost Hierarchy Overview
- Cost Hierarchy
- Payroll Costing
- Viewing Costing Process Results
- Costing Setup Page Account Number Types
- Costing an Element
- Costing an Element Input Value
- More on Costing an Element Input Value
- Instructor Demonstrations
- Summary
- Practices

Object Groups

- Learning Objectives
- Object Groups Overview

- Element Groups
- Payroll Relationship Groups
- Payroll Relationship Groups Characteristics
- Summary
- Practices

Payroll Flow Patterns

- Learning Objectives
- Payroll Flow Pattern Overview
- Payroll Flow Checklist
- Payroll Flow Pattern Components
- Tasks
- Payroll Flow Tasks
- Task Sequence
- Task And Flow Owners
- Task Parameters And Flow Parameters
- Submitting Flow Parameters
- Notifications
- Instructor Demonstration
- Summary
- Practice

Security for Payroll

- Learning Objectives
- Security Overview
- Data Role And HCM Security Profiles
- Example: Data Role And HCM Security Profiles
- Security Reference Implementation
- Separating Payroll Duties by Job Roles
- Provisioning Users With Roles
- Role Provisioning Events
- HCM Security Profiles
- HCM Security Profile Types
- HCM Security Profile Uses
- HCM Security Profiles Best Practices
- Payroll Security Profile
- Payroll Flow Security Profile
- Instructor Demonstration
- Summary

Balance Adjustments

- Learning Objectives
- When to Adjust Balances
- Regulated Limits And Related Balances

- Adjustment Methods
- Elements to Adjust
- Input Values to Adjust
- Geography Context to Adjust
- Adjustments With Refunds
- How to Pay Refunds
- Balance Adjustments to Cost
- Examples of Costing Balance Adjustments
- Reporting Balance Adjustments
- Documenting Balance Adjustment Details
- Instructor Demonstration
- Summary
- Practices

Payroll Reconciliations And Year-End Processing

- Learning Objectives
- Reconciliation Reports
- It’s a Balancing Act
- Before Starting the Reconciliation…
- Pay Period Balancing Steps
- Reconciling Statutory Deduction to Gross-to-Net Reports
- Reconciling Payroll Activity to Gross-to-Net Reports
- Reconciling the Payroll Register and Gross-to-Net Reports
- Monthly Balancing Steps
- Quarterly Balancing Steps
- Yearly Balancing Steps
- End-of-Year Processing for Canada
- Additional Reports for Payroll Balancing