

What's New in Oracle HRMSTM Release 11.0.2

Release 11.0.2

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What's New in Oracle HRMS Release 11.0.2

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CHAPTER

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What's New in Oracle HRMS Release 11.0.2

Welcome to What's New in Oracle HRMS Release 11.0.2.

This *What's New* chapter contains information about new features and enhancements added to Oracle HRMS in Release 11.0.2.

How to Use This What's New in Oracle HRMS Release 11.0.2

This *What's New* combines all the new features and enhancements added to Oracle HRMS Release 11.0.1 for inclusion in Release 11.0.2. The information in this document covers US and UK legislations, together with features common to all legislations.

How the Information is Organized

Section A provides a summary of all enhancements and new features delivered by Oracle HRMS Release 11.0.2.

Section B contains detailed information about the new features and enhancements, and provides step-by-step instructions about using any of the windows or reports if they have changed since earlier releases.

Section C describes post install steps for Release 11.0.2. If you have already completed post install steps after installing Release 11.0.1, you do not need to perform these post install steps for Release 11.0.2.

Section A – Summary of Enhancements and New Features in Oracle HRMS Release 11.0.2

This section provides a summary of all enhancements and new features delivered by Oracle HRMS Release 11.0.2.

Please read this section for the latest updates and additions to your online help and user's guide.

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Section B – New Features and Enhancements in Detail for Oracle HRMS Release 11.0.2

This section contains detailed information about the new features and enhancements, and provides step-by-step instructions about using any of the windows or reports if they have changed since earlier releases.

Data Pump

Oracle HRMS Data Pump is a tool that supports implementation by providing rapid transfer of legacy data. It operates by simplifying and standardizing the common tasks associated with loading batch data into the Oracle HRMS tables.

You are strongly advised to use predefined APIs when loading data. The predefined APIs enforce all the business rules in the system and guarantee the integrity of any data loaded into the system.

Data Pump will make it easier to use the predefined APIs by allowing you to do each of the following:

1. Map the data items from your external system to the parameter values of the appropriate APIs rather than mapping legacy data on an item by item basis.
2. Load your data into a single generic batch lines table rather than using a set of temporary batch tables
3. Run a standard process that will automatically call the appropriate API rather than having to write the programs to call each API.

For details of the components and features of Data Pump, and how to run the Data Pump process, see the White Paper *Oracle HRMS Data Pump*.

Deferred Compensation: 401(k)

Additional functionality now allows eligible employees to contribute part of their salary to a 401(k) plan rather than receive the salary in cash. This is called a Cash or Deferred Arrangement (CODA) plan.

This is usually a pre-tax contribution that reduces the employee's taxable income. The money contributed and money earned through interest are not subject to federal (nor most state) income tax until they are withdrawn. The maximum amount of salary that an employee may elect to defer and have contributed to a 401(k) plan is subject to change yearly. In addition to pre-tax contributions, employees may make after-tax contributions to a 401(k) plan.

Employers may contribute *matching* amounts (the match does not have to be exact).

Setting up 401(k) Deductions

Setting up 401(k) Deductions for your organization is a four part process. Each step requires you to start from a different Oracle Applications window. The four steps for setting up 401(k) deductions are:

1. Creating the 401(k) Deduction element(s).
You create 401(k) elements in the Deduction window.
2. Linking the 401(k) element(s) to eligible assignments.
You link 401(k) elements in the Element Link window.
3. Entering assignment values for the 401(k) element(s).
You enter assignment values for 401(k) elements in the Element Entry window.
4. Entering employer matching contribution amounts (if necessary).
You enter matching contribution amounts in the Globals window.

Once you create and save your 401(k) deduction, Oracle Payroll automatically generates both the pre- and post-tax deduction elements (if applicable). Oracle Payroll requires you to link and enter values for these elements separately.

401(k) elements and links only need to be created once for your organization. Individual 401(k) values must be entered and maintained

for each individual assignment as dictated by your benefit elections policy.

Creating a 401(k) Element

401(k) elements are created in the Deduction window.

► **To create a 401(k) element:**

1. Enter a unique name for the 401(k) element in the Name field. Enter a short name in the Reporting Name field, if desired.

The Name applies to both the deduction element and its formula. It must start with a letter of the alphabet, not a number or a symbol. The Reporting Name is a short name (less than 12 characters) that appears on reports and the statement of earnings.
2. In the Classification field, select Pre-Tax Deductions from the List of Values. In the Category field, select Deferred Comp 401k. In the Benefit Classification field, select 401(k).
3. Verify that the alternative region is set to Processing. In the Type region, make sure Recurring is selected. Make the appropriate selection in the Run Type region:
 - **Regular**, the deduction will process only in runs that produce an employee's regular pay in each period.
 - **All**, the deduction will process in both Regular and Supplemental runs.
4. Accept or change the default value in the Priority field. Make sure that the Standard Link checkbox remains unchecked.

The deduction's classification gives it a default processing priority in the payroll run. Elements with lower processing priorities process first.
5. Check the appropriate boxes in the Deferred Comp Rule Region:
 - **Employer Match** indicates that an ER Match element will be linked to employees who are eligible for 401(k) matching (or partial matching). This element has the same name as the element you are creating, plus the letters ER.
 - **After Tax Component** indicates that an AT element will be linked to employees that elect to contribute after tax money to the 401(k) plan. This element has the same name as the element you are creating, plus the letters AT.
6. Verify that On Entry is selected in both the Start Rule region and the Stop Rule region.

Selecting On Entry in these two regions will cause the deduction to start on the effective date you enter it for the employee and stop on the effective date that you delete it for the employee.

7. Check the Frequency Rules Exist checkbox, and click the Frequency Rules button to enter the appropriate information (if necessary).

See: Selecting Frequency Rules for the Deduction: *Oracle Payroll User's Guide*

8. Verify that the Series EE Bond checkbox is unchecked. Make sure the MIX Entry Allowed checkbox is checked. This will enable the deduction to receive entries through PayMIX.

Note: If you uncheck box, but later decide to allow PayMIX entries for this 401(k) deduction, you can use the Further Information portion of the Element window to select a PayMIX category.

9. Set the alternative region to Amount Details. Use the Rules region to select the appropriate amount Rule (If an AT element exists, these rules will apply to it as well):
 - **Flat Amount**, Select this if you want to deduct a fixed amount of money each pay period. You define this amount from the Element Entries Window for each employee.
 - **%Earnings**, Select this if you want to deduct a percentage of the employee's earnings each pay period. You define this amount from the Element Entries Window for each employee.

Note: Payroll Table and Benefits Table are not desirable selections for 401(k) deductions.

10. Make the appropriate selection in the Insufficient Funds region.
 - **Arrearage**, Select this if you want Oracle Payroll to hold the deduction in an arrears balance. The arrears balance takes the deduction's name.
 - **Partial Deduction**, Select this if you want Oracle Payroll to take a partial amount when earnings are insufficient to take the full deduction amount.

See: Selecting Arrearage Rules for the Deduction: *Oracle Payroll User's Guide*

11. Save your work.

Oracle Payroll generates the 401(k) elements (this process may take as long as 5 minutes). If you checked the After Tax Component checkbox in the Deferred Comp Rule region, a separate after tax element is created. This element will have the same name as the Pre-Tax element, but will be followed by the letters AT (After Tax). If you checked

Employer Match, a separate element is created. This element will have the same name as the original element, but will be followed by the letters ER.

Linking 401(k) Deductions to Assignments

The 401(k) deduction elements need to be linked to specific assignments. Linking is the process of defining which assignments are eligible for the 401(k) deduction element. You must link the deduction element before you can define the 401(k) deduction for each employee. You will have to repeat this procedure for each 401(k) element that you are going to use. For example, if you have a 401(k) deduction with both pre-tax and after-tax elements, you will have to complete this procedure twice: once for the pre-tax element, and once for the after-tax element.

See: Defining Element Links: *Oracle Payroll User's Guide*

You link 401(k) elements in the Element Link window.

Prerequisite

- You must create the 401(k) deduction element before you can link it.

► To Link a 401(k) Deduction Element

1. In the Element Name field, select the name of the 401(k) element that you are linking from the List of Values.
Note: You named the 401(k) element when you created it in the deduction window. If you created an after tax 401(k) element, it has the same name as the pre-tax element followed by the letters AT (after tax).
2. In the Eligibility Criteria region, make selections to define which assignments are eligible for the 401(k) deduction.
For example, if you select Fulltime-Regular in the Employment Category field, only employees that have been designated as Fulltime-Regular will be eligible for the 401(k) deduction.
Note: Leave the Payroll field blank and check the Link to all Payrolls box if you want employees assigned to *any* payroll to be eligible. This rule excludes employees with no payroll assignment.
3. In the Costing alternative region, select the Costable Type. If you accept the default (*Not Costed*), Oracle Payroll maintains no costing information for the 401(k) deduction element. Make any necessary entries into the Qualifying Conditions alternative region, and the Miscellaneous alternative region.

Note: If you are going to maintain costing information on employer contribution (ER) elements, you must create a link for the element and enter the appropriate information into the Costing alternative region. ER elements do not need to be linked to assignments unless you wish to maintain costing information for them.

See: Defining Element Links: *Oracle Payroll User's Guide*

4. Save your work.

The 401(k) deduction element is now linked to all existing eligible assignments. When you create a new eligible assignment, Oracle Payroll will update the link automatically.

Entering, Changing, and Ending an Employee's 401(k) Deduction

To enter, change, or delete an individual employee's 401(k) deduction, use the Element Entries window.

Prerequisite

- The 401(k) deduction element must be linked to the employee's assignment before you can enter, change, or delete deduction amounts.

► To enter a 401(k) deduction on an employee's record:

1. In the Element Name field, select the 401(k) Element from the List of Values. Click the Entry Values button.

Note: 401(k) elements for after-tax contributions have the same name as their pre-tax counterparts, followed by the letters AT (after-tax).

2. Enter the deduction amount in either the Amount field, or the Percentage field.

Only one of these two fields appears in the Entry Values window. The appearance of these fields is controlled from the Deduction window.

3. If you are entering a deduction amount for an after-tax element, select either Yes or No in the Take OverLimit AT field. This field does not appear for pre-tax elements.

If you select Yes in the Take OverLimit AT field, Oracle Payroll will automatically make after-tax deductions once the employee has reached the federal pre-tax limit.

4. Select a processing priority, if desired.

5. Save your work.

► **To change a 401(k) deduction on an employee's record:**

1. In the Element Name field, query the 401(k) deduction. Click the Entry Values button.
2. Update the deduction amount, or percentage for the employee.
3. Save the updated information.

► **To end 401(k) deductions on an employee's record:**

1. In the Element Name field, query the 401(k) deduction. Click the Entry Values button.
2. Select Delete Record.
3. Respond appropriately to the prompt to Purge or effectively End Date the deduction.
4. Save your changes.

Establishing Employer 401(k) Matching

Oracle Payroll allows you to set up employer 401(k) matching for your organization. The system default is for every dollar that an employee contributes up to 6% of their pay, the employer will match 50 cents. This criteria can be adjusted, or 401(k) matching can be removed altogether.

You establish Employer 401(k) matching from the Globals window.

Prerequisite

- The 401(k) deduction element must be linked to the employee's assignment before you can enter amounts into the Globals window.

► **To set up employer 401(k) matching**

1. In the Globals window, enter the limit of the employer match in the Value field for the EMPLOYER_MATCH_LIMIT variable. This is a decimal value that represents what percentage of the employees total pre-tax contribution will be matched by the company.

The default entry for this field is .06 (up to 6% of an employee's total contribution).

2. Enter the rate of the employer match in the Value field for the EMPLOYER_MATCH_PCT variable. This is a decimal value that represents what percentage of each contributed dollar is matched.

The default entry for this field is .5 (50% of the amount an employee contributes).

3. Save your work.

Extra Information Types

Extra Information Types (EITs) are a new feature in Release 11.0.2 of Oracle HRMS. They allow you to set up unlimited amounts of extra information for the Jobs category in HRMS.

Note: You may add your own information types but you must not change the definition of the delivered EITs.

For details of how to define Extra Information Types see the White Paper *Extra Information Types in Oracle HRMS*.

FUTA Credit

The functionality for implementing the Federal Unemployment Tax Act (FUTA) has been enhanced. Employers can now reduce the FUTA tax rate by taking advantage of employer credits based on the amount and timeliness of state unemployment taxes paid. Oracle Payroll has two methods to estimate the allowed credit:

- The first method calculates a net amount owed and is reflected on the FUTA Liability Balance.
- The second method takes into consideration varying SUI Experience Rates when a GRE has locations across several states. This method also acknowledges that the IRS may change the maximum credit allowed in a state. The FUTA Credit balance reflects the calculated credit. Using this method the FUTA liability balance reflects the gross liability before any credit.



Warning: Once you have selected one of the two methods for estimating FUTA credit, do not switch methods mid-year.

Note: The IRS allows credit only when SUI payments are on time. Since Oracle Payroll does not contain payment information, this determination cannot be made by the software.

Note: An employer can make excess voluntary payments to SUI with the objective to lower their SUI rate. Since SUI payments must be required by law in order to qualify for the normal FUTA credit, these excess payments are not currently supported in the calculation method.

The element classification of Employer Tax Credit holds the credit rate.

Net FUTA Liability Calculation Method

To calculate the the FUTA Liability net of the FUTA Credit, you must first determine your liability rate.

Example: currently, the normal FUTA rate is 6.2%. The IRS allows a maximum credit against this rate of 5.4%. The liability net rate is the difference between the two, in this instance 0.8%.

This rate overrides the rate currently used by the Vertex formulas and calculates the FUTA liability balance at the percentage entered.

Net FUTA Liability is entered on the Federal Tax Rules window.

- ▶ **To enter a FUTA override rate:**
 - Enter the override rate in the FUTA Override Rate field on the Federal Tax Rules window.

Maximum FUTA Credit Calculation Method

FUTA liability is calculated at the standard rate used by Vertex and the credit is reflected in a separate balance.

Note: You do not enter a FUTA liability net rate at the Federal level with this calculation method.

In this FUTA Tax Credit calculation method, you enter the maximum FUTA credit percentage for each state taxability rule within a GRE.

Example: in one of the states in which you have employees working, the IRS allows a maximum credit of 5.4%. This rate is entered in the State Tax Rules for that state.

Note: This rate may vary from state to state.

Maximum FUTA Calculation is entered in the State Tax Rules window.

Note: You can cost both the FUTA liability and the FUTA credit to the same GL account. Costing in this manner produces the same results as the Net FUTA calculation method. (This option is provided in the event that future legislation incorporates State specific credits.)

- ▶ **To record a maximum FUTA credit percentage for each state taxability rule:**
 - Enter the rate in the Maximum FUTA Credit Percentage field in the State Tax Rules window.

Hiring People

Hiring an Applicant

The hiring process has been enhanced so that you can now complete the hiring of an applicant in two days.

You do this from the Applicant Assignment window. You can now change the applicant status from Active to Accepted on the same day that you create the applicant. When you create a second assignment, the applicant status initially defaults to Active, but you can then override it with the status of Accepted.

On the day after an applicant has acquired the status of Accepted you can change the status to Employee..

Interview 1 Status and Interview 2 Status

The statuses Interview 1 and Interview 2 are now system statuses. You can select them from any any applicant status. Because Interview 1 and Interview 2 are provided as system statuses, you no longer need to create them as user statuses. If you have previously created Interview 1 and Interview 2 as user statuses, you can convert to system statuses by making a manual form change.

Reports (HR)

VETS-100 Report

The VETS-100 report can now be written to magnetic tape.
For details, see the White Paper *Producing Magnetic Tapes*.

Reports (OTA)

Budget and Costs Breakdown Report

This report has been enhanced so that you can now choose a display currency that is different from your normal working currencies. This means that the report will display a total in your display currency even if the total is made up of a series of different currencies.

► **To run the Budget and Costs Breakdown report:**

1. Select the report name in the Request Name field.

The Parameters window opens.

2. Select one of the following values to produce the report:
 - Activity Type (if you select an activity type you do not need to select an event title—Oracle Training Administration lists all events for the activity).
 - Activity Version (if you select an activity version you do not need to select an event title—Oracle Training Administration lists all events for the activity version).
 - Event Title
 - Program

Leave these field blank if you want to see all activities, events and programs in the report.

3. Select the status of any finance headers transferred to your accounting application, if required. For example, if you want to see all finance headers that are waiting to be transferred, enter Awaiting Transfer. Leave this field blank if you want to see finance headers of all statuses in the report.
4. Select the status of resource bookings you want to include in the report, for example, all Planned resource bookings. Leave this field blank if you want to see resource bookings of all statuses in the report.
5. Select the currency to include student (delegate) bookings of that currency in the report.
6. Select the student display currency
7. Select the currency to include resource bookings of that currency in the report.

8. Select the resource display currency
9. Select Yes to include summary only information in the report in the Summary Display Mode field, or select No to include detailed information.
10. Enter start and end dates to include events within that range in the report.
11. Select Yes to include all student enrollments for which payment has been made in the report, or select No to include student enrollments that have not been paid.
12. Enter the standard price of the events you want to include in the report, if required. The report lists all events with standard amounts up to and including the price you enter. Leave this field blank if you want to see all prices included in the report.
13. Choose the Submit Request button.

Reports (Payroll)

Employee Run Results Summary Report (UK)

This report has been enhanced. In addition to displaying report totals in your normal working currency you can now select a second currency in which totals will also be displayed.

The Employee Run Results Summary report displays all assignments for a given payroll, one assignment per line. You can view the results for an assignment number, by employee first name or surname.

Output

The report includes all assignments, gross pay, PAYE, employee's NI contribution, employer's NI contribution, other deductions, total deductions, net pay and total pay for the payroll.

You run this report in the Submit a New Request window.

- ▶ **To run the Employee Run Results Summary report:**
 1. Select the report name in the Request Name field.
The Parameters window opens.
 2. Select the payroll name to include in the report.
 3. Select the time period identification to include in the report.
 4. Select the consolidation set to include in the report.
 5. Select the display currency for the report totals
 6. Select the sort order; either assignment number, employee first name or surname.
 7. Choose the OK button.
 8. Choose the Submit Request button.

Payroll Register Report

The Payroll Register Report is a new report which shows employee-level details and/or group-level details, thus allowing you to reconcile W-2 totals by box number.

This paper report shows for an employee:

- complete payroll run details
- check or advice information
- specific federal, state, or local taxes withheld
- earnings and deductions
- employer liability
- quarter to date and year to date summaries

Selecting Payroll Register Report Criteria

You run the Payroll Register Report from the Submit Requests window.

► To run the Payroll Register report:

1. Select Payroll Register in the Name field, and click on the parameters field if the Parameters window does not automatically open.
2. Enter a GRE.
If nothing is entered, the system defaults to report all GREs.
3. Enter a consolidation set and payroll.
If nothing is entered, the system defaults to report all consolidation sets.
4. Select an individual assignment number.
If nothing is entered, the system defaults to report all assignment numbers.
5. If applicable, enter the ending date paid.
If nothing is entered, the system defaults to report all pay periods.
6. Submit the request.

Changing a State Quarterly Wage Listing Report

If you have run the State Quarterly Wage Listing report, and need to have it reflect changes or corrections, you can update specific sections of the report without having to recreate it entirely. Using the Payroll Process window, you can mark individual assignments or groups of employees for retry, and then run the Retry Payroll process. Oracle

Payroll will only reprocess the data that you have marked for retry. The updated report will be in the same format as the original, and will replace the original report.

See: State Quarterly Wage Listings: *Oracle Payroll User's Guide*



Attention: If you need to rerun a State Quarterly Wage Listing report that was originally created before Patch 672639 was installed, continue to use the old procedure. Reports generated prior to the installation of the patch still appear in the Payroll Processes window, but contain no entry in the Name field.

See: Rollbacks of Processes for Reports on Magnetic Tape: *Oracle Payroll User's Guide*

Run this process from the Payroll Processes window.

► **To run the Retry Payroll process:**

1. Enter values for the Payroll, Period From, and Period To fields. Click the Find button.

Note: If you want to retry an entire Payroll process, check the Retry box next to the process name. You can check more than one process for retry, but you must rerun the processes one at a time.

It is possible to use the Query command to create a selectable list of processes without specifying a payroll. To do this, click in the Date field and select Query > Enter from the main menu. Then, enter your query (for example, type the name of the state followed by %SQWL% into the Name field to list all of the processes for the selected state). Once you have entered your query, select Query > Run from the main menu. All processes found by your query are listed.

2. Select which Payroll process you want to retry by clicking on its name. Click Assignment Process.
3. Check the Retry box next to each assignment that you want to update in the new State Quarterly Wage Listing Report.

Note: If you checked the entire Payroll process in Step 1, you do not need to select individual assignments. All assignments in this run will be included in the new report.

4. Save your work.
5. Navigate to the Submit Requests window, and in the name field, type Retry Payroll Process or select it from the List of Values.
6. In the Parameters window, use the List of Values in the Payroll Process field to select the magnetic report that you want to rerun. Click the OK button, then, click the Submit button.

The old State Quarterly Wage Listing report is replaced by the updated one.

See: State Quarterly Wage Listings: *Oracle Payroll User's Guide*

Tax Remittance Reports

There is enhanced reporting functionality which allows you to report the taxable wages and taxes withheld to remit the correct amount of employment and income taxes. This remittance can be required to be made within 24 hours of check date. Some reporting cycles may be semi-monthly, monthly, or quarterly.

The enhancements are implemented in two tax remittance reports:

- Federal and State Tax Remittance Report
- Local Tax Remittance Report

Federal and State Tax Remittance Reporting

This report shows the federal and state balances summarized for a particular range of check dates. For instance, if you report wages and taxes quarterly, you would choose a check starting and ending date that covered the quarter for which you are reporting.

Oracle Payroll allows you to choose the following options for generating this report (entries are either required or optional):

- Starting Check Date (required)
Any date that a payment has been made to an employee.
- Ending Check Date (required)
Any date that a payment has been made to an employee.
- GRE (optional)
All valid GREs.




Attention: Leaving this field blank causes all GREs to be included in this report.

- Federal (required)
 - If yes, both federal and state reporting is done; the report heading displays, “Federal/State Tax Remittance Report.” (default)

- If no, only the state-level reporting is done, and the report heading displays, "State Tax Remittance Report."
- State (optional)
 - All valid US States including the District of Columbia
- Dimensions (required)
 - Check Date Range Only (default)
 - Check Date Range and Month to Date
 - Check Date Range and Quarter to Date
 - Check Date Range and Year to Date

You run the Federal and State Tax Remittance Report from the Submit Requests window.

► **To create a Federal and State Tax Remittance Report:**

1. Select Federal and State Tax Remittance Report Manager in the Name field, and click on the parameters field if the Parameters window does not automatically open.
 2. Enter the check range in the Starting Check Date and Ending Check Date fields.
 3. Enter an appropriate GRE, if applicable.
-  **Attention:** Leaving this field blank causes all GREs to be included in this report.
4. Enter the appropriate value for the type of remittance report you want to generate.
 5. Select a state if appropriate.
 6. Enter the appropriate reporting dimension.

Local Tax Remittance Reporting

This report shows the local tax balances summarized for a particular range of check dates. For instance, if you report wages and taxes monthly, you would choose a check starting and ending date that covered the period for which you are reporting.

Oracle Payroll allows you to choose the following options for generating this report (entries are either required or optional):

- Starting Check Date (required)

Any date that a payment has been made to an employee.

- Ending Check Date (required)

Any date that a payment has been made to an employee.

- GRE (optional)

All valid GREs.



Attention: Leaving this field blank causes all GREs to be included in this report.

- State (optional)

All valid US States including the District of Columbia



Attention: Leaving this field blank causes all States to be included in this report.

- Locality Type (optional)

- City

All valid cities in a particular State, or in all States if the State field has been left blank.

- County

All valid counties in a particular State, or in all States if the State field has been left blank.

- School District

All valid school districts.



Attention: Leaving the Locality Type field blank causes all locality types to be included in the report. Leaving City, County, or School District blank causes all localities of that type to be reported.

- Sort Option One, Two, and Three (Optional)

Local tax remittance reports are organized according to user-defined criteria. The three variables that reports are sorted by are:

- Locality
- Locality Type
- State

The Sort Options are Hierarchical in nature. For instance, if you want to create a tax remittance report sorted by State, Locality, and Locality Type, you enter State into the Sort Option One field, Locality into the Sort Option Two field, and Locality Type into the Sort Option Three field. Using the selected Sort Options,

Oracle Payroll generates the report with each entity listed alphabetically by Locality type, Locality types listed beneath each Locality, and Localities listed beneath the selected State(s).

The sort options are nested. Using the previous example, if you change Sort Option Two from Locality to Locality Type, Sort Option Three is automatically cleared. If you still want to sort by Locality, you must enter it into the Sort Option Three field.

- Dimensions (required)
 - Check Date Range Only (default)
 - Check Date Range and Month to Date
 - Check Date Range and Quarter to Date
 - Check Date Range and Year to Date

You run the Local Tax Remittance Report from the Submit Requests window.

► **To create a Local Tax Remittance Report:**

1. Select Local Tax Remittance Report Manager in the Name field, and click on the parameters field if the Parameters window does not automatically open.
2. Enter the check range in the Starting Check Date and Ending Check Date fields.
3. Enter an appropriate GRE, if applicable.



Attention: Leaving this field blank causes all GREs to be included in this report.

4. Select a state if appropriate.
5. Enter the appropriate locality type



Attention: Leaving this field blank causes all Cities, Counties, and School Districts to be included in this report.

Note: Selecting from the List of Values enables the corresponding field.

6. If a value was entered in the Locality Type field, in the corresponding field, enter an appropriate locality.
7. Enter your desired sort options into the Sort Option One, Two, and Three fields.

Note: You may sort using one, two, or three of the Sort Option fields. You are not required to enter a value into each field. If you leave the Sort Option fields blank the report will be sorted by State, Locality, and Locality Type.

8. Enter the appropriate reporting dimension.

Salary Administration

Input Values for the Salary Basis Window

If you have already applied the Release 11.0.1 patch then you will already have implemented the enhanced functionality for Salary Administration which is described in Chapter 2 *What's New in Oracle HRMS Release 11.0.1*.

Release 11.0.2 provides all of this enhanced functionality. It also allows you to specify the input value Payroll Period when you are defining a salary element. If you define the input value Payroll Period then the pay per payroll period will be written to this value.

Note: This is an addition to existing functionality. It does not remove any of the existing functionality

Update Payroll Run

Specifying a Period When Updating a Payroll Run

The Update Payroll Run window has been changed to enhance performance. You can now optionally select a period to which the updates will apply rather than including all periods for the payroll. This is implemented by two additional fields Period From and Period To. If you do not make a selection in these fields, then the update will apply, as previously, to all periods for the payroll.

► **To change the consolidation set for a payroll:**

1. Query the payroll whose consolidation set you want to change.



Suggestion: Optionally, select the period for which you wish to change the consolidation set by providing a Period From date and a Period To date. If you do not specify a period then the update action will apply to all payroll periods for this payroll

Payroll run information for the payroll displays in reverse order from the last completed run. The Set region displays whether the run was for an element set and/or assignment set.

Note: You can update consolidation set and pay advice information in this window regardless of the status displayed for the payroll run.

2. Enter a new consolidation set.
3. Update pay advice date and message information if required.

The pay advice date and message fields are for information only.

Section C – Post Install Steps for Release 11.0.2

The QuickCode BUDGET_MEASUREMENT_TYPE has changed from user-defined to extensible and now has seeded values to enable Oracle HRMS to use some or all these values in the future. For example, in formulas and by the forthcoming Oracle Advanced Benefits product.

Note: If you have already completed post install steps after installing Release 11.0.1, you do not need to perform these post install steps for Release 11.0.2.

Seeding New QuickCodes for BUDGET_MEASUREMENT_TYPE in Release 11.0.2

In the 11.0.2 install, the following values are now seeded for BUDGET_MEASUREMENT_TYPE:

Value	Meaning
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

Implications of the New Seeded Values

Your enterprise has probably been using values and meanings for the QuickCode Type BUDGET_MEASUREMENT_TYPE. The Release 11.0.2 install seeds the values and meanings depending on four criteria. These are that your enterprise has:

- Identical QuickCode values to those seeded, but with different meanings: page 2 – 130
- Different QuickCode values to those seeded, but with identical meanings: page 2 – 131
- Identical QuickCode values and meanings to those seeded: page 2 – 132
- Different (or no) QuickCode values and meanings to those seeded: page 2 – 132

We explain the four different scenarios below, and provide solutions to help you resolve any problems with the seeded values or meanings.

Note: Once you have run the Release 11.0.2 install, we suggest you use the QuickCodes window to check your existing and new seeded values and meanings.

Scenario 1 – Identical QuickCode Value(s) But Different Meanings

Your enterprise has used identical QuickCode values to the values now seeded with 11.0.2, but with different meanings. For example, you might have used the value HEAD, but with your own meaning Number of Employees.

In this instance, Oracle HRMS assumes that you used the QuickCode value in the way the new seeded value is intended for use, irrespective of the meaning, so doesn't seed the new QuickCode value or meaning for HEAD and Number of Employees. It does, however seed the other QuickCode values and meanings.

Your Values and Meanings – Before the installation is performed:

Value	Meaning
HEAD	Number of Employees

Your Values and Meanings – After the installation is performed:

Value	Meaning
FTE	Full Time Equivalent
HEAD	Number of Employees
MONEY	Money
PFT	Percent Full Time

Note: If, for example, a seeded formula to calculate head count is provided by Oracle HRMS in the future, the calculation drives off all assignment budget value records tagged with the QuickCode value HEAD, regardless of the use you made of this value in the past.

What You Need to Do

If your meanings are not the same as the seeded meanings, you must change the meaning to the seeded meaning. For example, you must change the meaning for the value HEAD from **Number of Employees** to **Head Count**.

► **To change the meaning of the QuickCode value:**

To change the meaning of the QuickCode value, do **one** of the following:

Either:

1. Update the meaning of the value HEAD to Head Count using the QuickCodes window.
2. Create a new QuickCode value and meaning for the QuickCode BUDGET_MEASUREMENT_TYPE.

For example, create a QuickCode value NUMEMPS (number of employees).

3. Transfer the current assignment budget values from HEAD to a new value using the script pepstabv.sql. Enter HEAD as the value **from which** you want the assignment budget value to be transferred and enter NUMEMPS as the value **to which** you want the assignment budget value records to be transferred.

See: Running the Script Pepstabv.sql to Transfer Budget Values: page 2 – 133.

Or:

1. Leave the assignment values as they are. Then, any seeded formula to calculate head count drives off the QuickCode value HEAD, using the assignment budget values.

Note: The meaning of the value 'HEAD' remains as 'Number of Employees' although the seeded meaning would have been 'Head Count' had the value not already existed.

Scenario 2 – Different QuickCode Value(s) But Identical Meaning

Your enterprise has used different QuickCode values to the values now seeded with 11.0.2, but with meanings identical to those being seeded. For example, you might have used the value FULL (the seeded value is FTE), with the meaning Full Time Equivalent (which is the seeded value).

In this instance, Oracle HRMS updates the meaning to avoid data integrity problems. However, none of the assignment budget value records that refer to this QuickCode value have been modified, and there are now two QuickCode values for full time equivalent assignment budget values: Full and FTE.

Note: The value changed to have an @ sign at the beginning of the meaning.

Your Values and Meanings – Before the installation is performed:

Value	Meaning
FULL	Full Time Equivalent

Your Values and Meanings – After the installation is performed:

Value	Meaning
FULL	@Full Time Equivalent
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

What You Need to Do

You need to replace the old QuickCode value with the seeded value.

► **To replace the old QuickCode value with the seeded value:**

1. Run the script pepstabv.sql to replace the old QuickCode value with the seeded value. Enter FULL as the value **from which** you want the assignment budget value to be transferred and enter FTE as the value **to which** you want the assignment budget value to be transferred.

See: Running the Script pepstabv.sql to Transfer Budget Values:
page 2 – 133.

2. Disable the QuickCode value FULL.

Scenario 3 – Identical QuickCode Value(s) and Meanings

Your enterprise used identical QuickCode values and meanings to those QuickCode values and meanings seeded.

In this instance, Oracle HRMS does not seed the QuickCode values and meanings, and retains your own.

What You Need to Do

You need do nothing.

Note: We assume that your understanding and use of the QuickCode values and meanings is identical to Oracle HRMS's understanding and use.

Scenario 4 – Different QuickCode Value(s) and Meanings

Your enterprise used neither the QuickCode values and meanings to those QuickCode values and meanings seeded.

In this instance, Oracle HRMS retains your own QuickCode values and meanings (for example, EMP and My Head Count), and seeds the new QuickCode values and meanings (HEAD and Head Count).

Your Values and Meanings – Before the installation is performed:

Value	Meaning
EMP	My Head Count

Your Values and Meanings – After the installation is performed:

Value	Meaning
EMP	My Head Count
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

What You Need to Do

You can leave values and meanings as they are, and do nothing. If you do this, users will see two similar QuickCodes and meanings and will not know which one to select. Alternatively, you can replace the QuickCode value EMP with the seeded value of HEAD.

► **To replace the old QuickCode value with the seeded value:**

1. Run the script pepstabv.sql to replace the old QuickCode value with the seeded value. Enter EMP as the value **from which** you want the assignment budget value to be transferred and enter Head as the value **to which** you want the assignment budget value to be transferred.

See: Running the Script pepstabv.sql to Transfer Budget Values:
page 2 – 133.

2. Disable the QuickCode value EMP.

Running the Script pepstabv.sql to Transfer Budget Values in Release 11.0.2

You can run the script pepstabv.sql to transfer budget values from one QuickCode value to another QuickCode value.

If you are running pepstabv.sql, you must run it immediately after Release 11.0.2 has been installed. Otherwise, if a single assignment has

assignment budget values of both the old and new types before running the script, data problems may occur.

► **To run the script pepstabv.sql:**

1. Back up your data before before running the script as pepstabv.sql changes the assignment budget values automatically.

2. Run the script pepstabv.sql
(\$PER_TOP/patch/110/sql/pepstabv.sql)

For example, sqlplus <apps a/c username>/<apps a/c password>@<your database name> @pepstabv.sql

3. Enter the old value (the QuickCode value **from which** you want the assignment budget value to be transferred).

4. Enter the new value (the QuickCode value **to which** you want the assignment budget value to be transferred).



Warning: If you have already moved an old value to a new value and you run pepstabv.sql again with a different old value and the same new value, both sets of data refer to the same new value and data problems will occur.

Making Further Checks

You should make the following checks after running pepstabv.sql.

- Check the assignment budget values for different employees to ensure that the description has changed in the expected manner.
- Check the organization budget value defaults, and also check the values available on the Value field within the Flexfields window.
- Check the budgets to ensure the measurement type displayed has been updated.

CHAPTER

2

What's New in Oracle HRMS Release 11.0.1

This chapter contains information about new features and enhancements added to Oracle HRMS between Release 10SC Production 16.1 and Release 11.0.1. It also identifies any corrections to existing documentation.

How to Use This What's New in Oracle HRMS Release 11.0.1

This *What's New* combines all the new features and enhancements described in the online help delivered with Oracle HRMS Release 11.0 and 11.0.1. The information in this document covers US and UK legislations, together with features common to all legislations.

How the Information is Organized

Section A provides a summary of all enhancements and new features delivered by Oracle HRMS Release 11.0 and 11.0.1.

Section B contains detailed information about the new features and enhancements, and provides step-by-step instructions about using any of the windows or reports if they have changed since earlier releases.

Section C describes any corrections to existing documentation.

Section D describes post install steps for Release 11.0.1.

Section A – Summary of Enhancements and New Features in Oracle HRMS 11.0.1

This section provides a summary of all enhancements and new features delivered by Oracle HRMS Release 11.0 and 11.0.1.

Please read this section for the latest updates and additions to your online help and user's guide.

APIs

Common

APIs in Release 11.0.1: page 2 – 51

Publicly Callable Business Process APIs: page 2 – 53

APIs With User Hooks: page 2 – 58

Balances

Common

Adjusting Balances : page 2 – 62

Latest Balance Retention : page 2 – 62

US

Adjusting a Balance (Non-Tax for an Employee) US: page 2 – 62

Entering Adjustments to Employee Tax Balances US: page 2 – 63

UK

Adjusting a Balance UK: page 2 – 65

Batch Element Entry

Common

BEE : page 2 – 66

Career Management

Common

Career Management : page 2 – 67

COBRA Administration

US

COBRA Upgrade: page 2 – 68

Compensation

US

Workers Compensation: page 2 – 69

Custom Library

Common

Custom Library Calls: page 2 – 70

Elements

Common

Adjusting a Pay Value: page 2 – 72

UK

Information Elements

You can now define an information element that selectively feeds balances as follows:

- It can feed the Taxable Pay balance without feeding gross pay, net pay or total pay. An example use is for fixed profit car schemes.
- It can feed the NI Pay balance without feeding gross pay, net pay or total pay.

FastFormula

Common

FastFormula now callable from PL/SQL

HR users as well as Payroll users can now call FastFormula from PL/SQL, making it possible to use formulas in a wider context, for example, in business rule validation.

Define Function

You can register new FastFormula functions directly using this window. User defined functions, such as calculating the proration for mid-month salary increases, enable implementers to meet specific business requirements for each enterprise.

See: Defining Functions, *Oracle FastFormula User's Guide*.

Registering a Function: page 2 – 73

Hiring People

Common

Hiring and Rehiring Applicants and Ex-Employees: page 2 – 74

Mass Update of Applicants

This window now clears the information from the fields once you accept or cancel the update, saving you from having to remove the information before performing another update. You can also look at ten rows of information instead of five.

See: Mass Updates, *Oracle Human Resources User's Guide*.

Locations

US

New Cities and Ranges of Zip Codes: page 2 – 78

Menus

Common

FastPath – New Menu Feature: page 2 – 79

Payroll Processes

Common

Payroll and FastFormula Multibyte Support:

Oracle HRMS can now handle multibyte characters for languages such as Japanese.

Process Restartability

In previous releases, if the system crashed during a payroll run it would resubmit the payroll from the beginning again when it restarted, thereby processing some assignments twice. Release 11 prevents this from happening. To restart a payroll run after a crash, contact Oracle Worldwide Customer Support for assistance.

RetroPay by Run: page 2 – 81

Viewing Assignment Process Results

The functionality of the Payroll and Assignment Processes window has been enhanced. On choosing the Balances button there is now a new column called *Name* which allows you to see a display of balance names. You can then select a particular balance or choose the Further Balances button to view the balance dimensions.

UK

Advance Pay

This window is used to set up payment for individual employees in advance for holidays or other events. There is also a new report, Advance Pay Listing.

See: Advance Pay Process, *Oracle Payroll User's Guide*.

Personal Information

Common

Telephone Numbers on the Person Window: page 2 – 92

Deleting People from the System (Contacts): page 2 – 92

Positions and Vacancies

Common

Ending a Position: page 2 – 93

Using HR Direct Access to Advertise Vacancies: page 2 – 93

Post Install Steps for Release 11.0.1

Seeding New QuickCodes for BUDGET_MEASUREMENT_TYPE: page 2 – 129

QuickCodes

Common

List of Values (QuickCodes)

The customization level for the QuickCode FREQUENCY has been changed from Extensible to System.

Reports (HR)

US

EEO-100 and VETS-100 Reporting: page 2 – 82

Reports (Payroll)

US

State Quarterly Wage Listing (SQWL): page 2 – 83

End of Year Reporting US: page 2 – 83

Multiple Worksite Reporting

Employers with multiple worksites must file quarterly employment and wage reports. This information is used by the Bureau of Labor

Statistics (BLS) to provide analyses of U.S. employment. This Multiple Worksite Report (MWS) is submitted on magnetic media.

See: Multiple Worksite Reporting on Magnetic Tape, *Oracle Payroll User's Guide*.

1099R Reporting Enhancements: page 2 – 84

Employee Run Results Report US: page 2 – 85

Taxable Balance Verification Report: page 2 – 86

Invalid Address Information Report: page 2 – 87

GRE Totals Report: page 2 – 87

Negative Balances Report: page 2 – 89

UK

Employee Run Results Summary Report UK

End of Year Reporting UK: page 2 – 90

Salary Administration and Budgeting

Common

Salary Administration: page 2 – 94

Adding the Performance Window to User Defined Task Flows: page 2 – 99

Date Tracking Assignment Budget Values: page 2 – 100

Security Profiles

Common

Profile Options: page 2 – 101

New HR:Security Profile User Profile Option : page 2 – 101

HR:Business Group Profile Option: page 2 – 101

Restricted Security Profile: page 2 – 102

Renamed Secure Views: page 2 – 102

SSP/SMP

Changes to Average Earnings Calculations: page 2 – 103

System Enhancements

Common

Long Lists

If you have a large HRMS database with many organizations, jobs, positions, grades, locations and cities, you will see a performance improvement on the list of values on these fields throughout the system. They have now been defined as "long lists". This means you are presented with a dialog box in which to enter selection criteria when you ask for the list of values on these fields.

Task Flows

Common

Create Task Flows Using Oracle Workflow: page 2 – 104

Seeded Task Flows: page 2 – 113

Tax Calculations

US

Tax Groups

Enterprises with multiple GREs can place certain GREs together in *Tax Groups*. Using tax groups enables employers to give employees moving within GREs credit towards their Social Security and Federal Unemployment Tax Act (FUTA) taxes.

See: GREs and Tax Groups, *Oracle Human Resources User's Guide*.

Tax and Assignment Information

Tax and assignment information is now datetracked.

See: Tax Information for an Employee Assignment, *Oracle Human Resources User's Guide*.

VERTEX Geocode Upgrade

The VERTEX Geocodes used to calculate taxes have been expanded to include new states, counties, cities and zip codes.

VERTEX Software



Attention: Enterprises running Oracle Payroll in the US must use VERTEX software for tax calculations. For contact details, see page 2 – 114

Wage Attachments

US

Wage Attachment : page 2 – 115

Section B – New Features and Enhancements in Detail for Release 11.0.1

This section contains detailed information about the new features and enhancements for Release 11.0.1. It provides step-by-step instructions about using any of the windows or reports if they have changed since earlier releases.

APIs

APIs in Release 11.0.1

The following sections identify the new file name standard, information for new users, the current API listing, and APIs with user hooks.

New File Name Standard

The file name standard for API source code has been changed for Release 11, from *bpi.pkh to *api.pkh. For example, the file name for the Create Employee API has changed from peembpi.pkh to peempapi.pkh.

Table 2 – 1 shows all the current APIs. The new APIs are shown in **bold type**.

Note: The update_term_details_emp api for ex-employees is available from Release 10 Prod 16.1.

Business Process APIs

When you run the Business Process APIs against the APPS Oracle user, they access data through an unrestricted security profile.

Information for New Users

The APIs listed in Table 2 – 1 are all publicly callable business process APIs. You can use them all and Oracle supports them all. However, there are other business process APIs included with some of the files below which are not supported yet.

The APIs do not maintain security tables. You should run LISTGEN separately after using the APIs to regenerate security lists if required.

Flexfield APIs

The following row handlers now use the ATG descriptive flexfield APIs:

- PER_APPLICATIONS
- PER_PAY_PROPOSALS
- PER_PAY_PROPOSALS_COMPONENTS
- PER_PERFORMANCE_REVIEWS

- PER_PERIODS_OF_SERVICE

Note: The flexfield packages no longer require maintenance.

For all other APIs, you must consider what validation each flexfield segment requires and write your own code to maintain flexfield information. 'Skeleton' packages (filename *****fli.pkh, *****fli.pkb) have been provided to hold such code. They will raise an error if any flex segments containing data are passed to the APIs.

Validation is provided for US and GB versions of legislation specific flex structures. These include the following:

- the protected descriptive flex on the person
- the US GREflex on the assignment
- external bank account validation
- address validation

Until flexfield APIs become part of the standard product, validation of these flex structures for legislations other than US and GB needs to be written by localization teams as required.

See: Calling APIs, *Oracle HRMS Implementation Guide*

Publicly Callable Business Process APIs in Release 11.0.1

See Also

Calling APIs, *Oracle HRMS Implementation Guide*
DateTrack, *Oracle HRMS Implementation Guide*

File Name	Package Name	Business Process	Comments
peempapi.pkh	hr_employee_api	create_employee	
peempapi.pkh	hr_employee_api	create_gb_employee	wrapper for create_employee with GB flex segment names
peempapi.pkh	hr_employee_api	create_us_employee	
peempapi.pkh	hr_employee_api	re_hire_ex_employee	
peexeapi.pkh	hr_ex_employee_api	actual_termination_emp	
peexeapi.pkh	hr_ex_employee_api	final_process_emp	
peexeapi.pkh	hr_ex_employee_api	update_term_details_emp	updating termination information such as leaving reason and termination dates
peappapi.pkh	hr_applicant_api	create_applicant	
peappapi.pkh	hr_applicant_api	create_us_applicant	
peappapi.pkh	hr_applicant_api	create_gb_applicant	
peappapi.pkh	hr_applicant_api	hire_applicant	
peperapi.pkh	hr_person_api	update_person	
peperapi.pkh	hr_person_api	update_gb_person	wrapper for update_employee with GB flex segment names
peperapi.pkh	hr_person_api	update_us_person	
peonapi.pkh	hr_contact_api	create_person	of type Other - not an Employee or Applicant
peclapi.pkh	hr_contact_rel_api	create_contact	
peclapi.pkh	hr_contact_rel_api	update_contact_relationship	
peclapi.pkh	hr_contact_rel_api	delete_contact_relationship	
pephnapi.pkh	hr_phone_api	create_phone	
pephnapi.pkh	hr_phone_api	update_phone	
pephnapi.pkh	hr_phone_api	delete_phone	
peasgapi.pkh	hr_assignment_api	activate_emp_asg	

Table 2 – 1 Publicly Callable Business Process APIs in Release 11.0.1

File Name	Package Name	Business Process	Comments
peasgapi.pkh	hr_assignment_api	create_secondary_emp_asg	
peasgapi.pkh	hr_assignment_api	create_us_secondary_emp_asg	
peasgapi.pkh	hr_assignment_api	create_gb_secondary_emp_asg	
peasgapi.pkh	hr_assignment_api	suspend_emp_asg	
peasgapi.pkh	hr_assignment_api	update_emp_asg	
peasgapi.pkh	hr_assignment_api	update_us_emp_asg	
peasgapi.pkh	hr_assignment_api	update_gb_emp_asg	
peasgapi.pkh	hr_assignment_api	update_emp_asg_criteria	
peasgapi.pkh	hr_assignment_api	update_apl_asg	
peasgapi.pkh	hr_assignment_api	create_secondary_apl_asg	
peasgapi.pkh	hr_assignment_api	offer_apl_asg	
peasgapi.pkh	hr_assignment_api	actual_termination_emp_asg	
peasgapi.pkh	hr_assignment_api	final_process_emp_asg	
peaplapi.pkh	hr_application_api	update_apl_details	
peaddapi.pkh	hr_person_address_api ¹	create_person_address	
peaddapi.pkh	hr_person_address_api	create_gb_person_address	wrapper for create_per- son_address with GB flex segment names
peaddapi.pkh	hr_person_address_api	create_us_person_address	wrapper for create_per- son_address with US flex segment names
peaddapi.pkh	hr_person_address_api ¹	update_person_address	
peaddapi.pkh	hr_person_address_api	update_gb_person_address	wrapper for update_per- son_address with GB flex segment names
peaddapi.pkh	hr_person_address_api	update_us_person_address	wrapper for update_per- son_address with US flex segment names
pesitapi.pkh	hr_sit_api	create_sit	
pesitapi.pkh	hr_sit_api	update_sit	
pyppmapi.pkh	hr_personal_pay_method_api	create_personal_pay_method	
pyppmapi.pkh	hr_personal_pay_method_api	create_us_personal_pay_method	
pyppmapi.pkh	hr_personal_pay_method_api	create_gb_personal_pay_method	
pyppmapi.pkh	hr_personal_pay_method_api	update_personal_pay_method	
pyppmapi.pkh	hr_personal_pay_method_api	update_us_personal_pay_method	

Table 2 – 1 Publicly Callable Business Process APIs in Release 11.0.1

File Name	Package Name	Business Process	Comments
pyppmapi.pkh	hr_personal_pay_method_api	update_gb_personal_pay_method	
pyppmapi.pkh	hr_personal_pay_method_api	delete_personal_pay_method	
hrpyyapi.pkh	hr_upload_proposal_api	upload_salary_proposal	
pyeleapi.pkh	py_element_entry_api	create_element_entry	
pyeleapi.pkh	py_element_entry_api	delete_element_entry	
pyeleapi.pkh	py_element_entry_api	update_element_entry	
pygrrapi.pkh	hr_grade_api	create_grade_rate_value	
pygrrapi.pkh	hr_grade_api	delete_grade_rate_value	
pygrrapi.pkh	hr_grade_api	update_grade_rate_value	
pypsrapi.pkh	hr_pay_scale_api	create_pay_scale_value	
pypsrapi.pkh	hr_pay_scale_api	delete_pay_scale_value	
pypsrapi.pkh	hr_pay_scale_api	update_pay_scale_value	
peposapi	hr_position_api	create_position	
pypsrapi.pkh	hr_position_api	update_position	
pepsrapi.pkh	hr_position_requirement_api	create_position_requirement	
pejobapi.pkh	hr_job_api	create_job	
pejbrapi.pkh	hr_job_requirement_api	create_job_requirement	
pemmvapi.pkh	hr_mass_move_api	mass_move	
pevgrapi.pkh	hr_valid_grade_api	create_valid_grade	
hrabmapi.pkh	hr_batch_message_line_api	create_message_line	
hrabmapi.pkh	hr_batch_message_line_api	delete_message_line	
hrabmapi.pkh	hr_batch_message_line_api	delete_batch_lines	
peaprapi.pkh	hr_appraisals_api	create_appraisal	
peaprapi.pkh	hr_appraisals_api	update_appraisal	
peaprapi.pkh	hr_appraisals_api	delete_appraisal	
peaptapi.pkh	hr_appraisal_templates_api	create_appraisal_template	
peaptapi.pkh	hr_appraisal_templates_api	update_appraisal_template	
peaptapi.pkh	hr_appraisal_templates_api	delete_appraisal_template	
peasnapi.pkh	hr_assessments_api	create_assessment	
peasnapi.pkh	hr_assessments_api	update_assessment	
peasnapi.pkh	hr_assessments_api	delete_assessment	

Table 2 – 1 Publicly Callable Business Process APIs in Release 11.0.1

File Name	Package Name	Business Process	Comments
peasrapi.pkh	hr_assessment_groups_api	create_assessment_group	
peasrapi.pkh	hr_assessment_groups_api	update_assessment_group	
peasrapi.pkh	hr_assessment_groups_api	delete_assessment_group	
peastapi.pkh	hr_assessment_types_api	create_assessment_type	
peastapi.pkh	hr_assessment_types_api	update_assessment_type	
peastapi.pkh	hr_assessment_types_api	delete_assessment_type	
pecelapi.pkh	hr_competence_element_api	create_competence_element	
pecelapi.pkh	hr_competence_element_api	update_competence_element	
pecelapi.pkh	hr_competence_element_api	update_personal_comp_element	
pecelapi.pkh	hr_competence_element_api	delete_competence_element	
pecelapi.pkh	hr_competence_element_api	maintain_student_comp_element	
pecelapi.pkh	hr_competence_element_api	copy_competencies	
pecelapi.pkh	hr_competence_element_api	update_delivered_dates	
pecpnapi.pkh	hr_competences_api	create_competence	
pecpnapi.pkh	hr_competences_api	update_competence	
pecpnapi.pkh	hr_competences_api	delete_competence	
peparapi.pkh	hr_participants_api	create_participant	
peparapi.pkh	hr_participants_api	update_participant	
peparapi.pkh	hr_participants_api	delete_participant	
peprtapi.pkh	hr_performance_ratings_api	create_performance_rating	
peprtapi.pkh	hr_performance_ratings_api	update_performance_rating	
peprtapi.pkh	hr_performance_ratings_api	delete_performance_rating	
perscapi.pkh	hr_rating_scales_api	create_rating_scale	
perscapi.pkh	hr_rating_scales_api	update_rating_scale	
perscapi.pkh	hr_rating_scales_api	delete_rating_scale	
pertlapi.pkh	hr_rating_levels_api	create_rating_level	
pertlapi.pkh	hr_rating_levels_api	update_rating_level	
pertlapi.pkh	hr_rating_levels_api	delete_rating_level	
peahcapi.pkh	hr_api_hook_call_api	create_api_hook_call	for defining which customer specific package procedures should be executed from which user hooks

Table 2 – 1 Publicly Callable Business Process APIs in Release 11.0.1

File Name	Package Name	Business Process	Comments
peahcapi.pkh	hr_api_hook_call_api	update_api_hook_call	
peahcapi.pkh	hr_api_hook_call_api	delete_api_hook_call	
peperapi.pkh/pkb	hr_person_api	update_person	
peclapi.pkh/pkb	hr_contact_rel_api	create_contract	
peprvapi.pkh	hr_perf_review_api	create_perf_review	
peprvapi.pkh	hr_perf_review_api	update_perf_review	
peprvapi.pkh	hr_perf_review_api	delete_perf_review	
peypapi.pkh	hr_maintain_proposal_api	insert_salary_proposal	
peypapi.pkh	hr_maintain_proposal_api	update_salary_proposal	
peypapi.pkh	hr_maintain_proposal_api	approve_salary_proposal	
peypapi.pkh	hr_maintain_proposal_api	delete_salary_proposal	
peypapi.pkh	hr_maintain_proposal_api	insert_proposal_component	
peypapi.pkh	hr_maintain_proposal_api	update_proposal_component	
peypapi.pkh	hr_maintain_proposal_api	delete_proposal_component	

Table 2 – 1 Publicly Callable Business Process APIs in Release 11.0.1

APIs With User Hooks

In Release 11, Oracle HRMS has supplemented the core product API functionality by the addition of API *user hooks*. These are locations in the HRMS APIs where additional customer specific logic can be executed.

When the API processing reaches a user hook, core product processing stops and any customer specific logic for that event is executed. Then, if no errors occur, the main API processing resumes.

You can use such extra logic to add functionality not supplied directly by Oracle Applications. This could include business events such as the following:

- *validating particular customer data*: For example, you could limit grade step promotions to a maximum of one step.
- *maintaining additional data in your own user defined tables*: This could include specialised information about employees not held in database tables supplied by Oracle HRMS.
- *detecting that a particular business event has occurred*: If the event was an employee termination process, for example, this could be made to send a message to your security database disabling the employee's security pass.



Attention: You should not manually edit the API source code files supplied by Oracle. If you do modify these files, Oracle Applications will be unable to support the product, and upgrades may not be possible. Oracle Applications only supports direct calls to the published APIs. Direct calls to any other server-side package procedures or functions that are written as part of the Oracle HRMS Applications suite are not supported.

See Also

APIs in Oracle HRMS, *Oracle HRMS Implementation Guide*

APIs Supporting User Hooks

The following APIs support the before process and after process user hooks:

applicant assignment

- offer_apl_asg
- update_apl_asg

contact relationship

- create_contact_relationship
- create_contact
- delete_contact_relationship

employee

- actual_termination_emp
- final_process_emp
- create_employee
- update_person

employee assignment

- activate_emp_asg
- suspend_emp_asg
- final_process_emp_asg
- update_emp_asg
- actual_termination_emp_asg

employee assignment criteria

- update_emp_asg_criteria

grade rate value

- create_grade_rate_value
- update_grade_rate_value
- delete_grade_rate_value

job requirement

- create_job_requirement

mass moves

- mass_moves

pay scale value

- create_pay_scale_value
- update_pay_scale_value
- delete_pay_scale_value

person address

- create_person_address
- update_person_address

personal payment method

- create_personal_payment_method
- update_personal_payment_method

position

- create_position
- update_position

position requirement

- create_position_requirement

secondary applicant assignment

- create_secondary_apl_asg

secondary employee assignment

- create_secondary_emp_asg

Row Handlers Supporting User Hooks

The Row Handlers on the following tables support the after insert, after update and after delete user hooks.

- PAY_PERSONAL_PAYMENT_METHODS_F
- PER_ADDRESSES
- PER_ALL_ASSIGNMENTS_F
- PER_ALL_PEOPLE_F

- PER_PAY_PROPOSALS_COMPONENTS
- PER_PERFORMANCE_REVIEWS
- PER_PHONES
- PER_POSITIONS
- PER_APPLICATIONS
- PER_CONTACT_RELATIONSHIPS

Balances

Adjusting Balances

You can now transfer adjustments to General Ledger accounts.

Latest Balance Retention

When a payroll run completes, Oracle Payroll saves latest balances for each balance type that have been defined as a latest balance, leading to high performance in subsequent runs and post run reporting. Before Release 11, however, rolling back a payroll run deleted all these balances, leading to slower processing time for the next payroll run.

In Release 11, the latest balances from the previous run are retained. They are not deleted if you roll back the current run, and so they remain available for the next payroll run.

Note: You will now only lose your latest balances if you roll back both the current run and the previous run, perform a reversal or perform a balance adjustment.

Adjusting a Balance (Non-Tax for an Employee) US

The Adjust Balance window has now been enhanced. You can now cost non-Tax balance adjustments and transfer them to General Ledger accounts.

There are new fields to enable you to cost non-Tax balance adjustments on the Adjust Balance window.

- ▶ **To adjust a non-tax balance for an employee:**
 1. Set the effective date to the date for the adjustment. The window displays this date and the corresponding payroll period for the employee.
 2. Select the element to which you are making the adjustment. The names of its input values appear in the Entry Values window. Make entries to these input values as necessary.
 3. The default consolidation set for the payroll of this employee assignment displays. You can enter a new consolidation set for the post-run processing of the balance adjustment.

4. If you want to cost the balance adjustment, check the Costed check box and select the Costing field. This allows you to enter costing details by using the Costing Allocation key flexfield.
5. Save your work. The system processes the new element entries and creates a run result for the element. The Status region displays the progress of this processing.

If the process ends with a status of Error, check that the units of measure for the entry values are correct. If they are, consult your system administrator.

Entering Adjustments to Employee Tax Balances US

The Adjust Tax Balances window has now been enhanced. You can now cost Tax balance adjustments and transfer them to General Ledger accounts.

There are new fields to enable you to cost Tax balance adjustments on the Adjust Tax Balances window.

► To adjust balances of subject wages and taxes withheld:

1. In the Assignment window, query the employee assignment for which you are entering adjustments to tax balances, and open the Adjust Tax Balances window.

The window displays the city, state, zip code and county of the employee's default work location, and the default consolidation set for the payroll of the employee's assignment. You can change these defaults if necessary.

2. To enter adjustments to the Gross Earnings Subject to Tax balances for the employee, select the name of the earnings type causing the adjustment in the Earnings Name field.

The list displays all the earnings types initiated in your system (classifications Earnings, Supplemental Earnings, and Imputed Earnings).

3. Enter the gross amount by which you are adjusting the Gross Earnings Subject to Tax balances. The amount can be positive or negative.

If you **are not** also entering adjustments to balances of taxes actually withheld, go to step 4. If you are also entering adjustments to Employee Withheld tax balances, go to step 5.

4. If you are adjusting Gross Earnings Subject to Tax Balances only, save your work and exit this window. The system updates Gross

Earnings Subject to Tax balances in accordance with the taxability rules for the earnings type (these appear in the Taxability Rules window).

5. To also enter adjustments to the Employee Withheld tax balances for this earnings type, in order to record in Oracle Payroll information about a payment made and tax deductions taken for the employee outside Oracle Payroll, enter the net amount of the payment.
6. If you want to cost the balance adjustment, check the Costed check box and select the Costing field. This allows you to enter costing details by using the Cost Allocation key flexfield.
7. Enter for each tax appearing in the Taxes Withheld region, any amount actually deducted for the tax from the gross amount of the earnings type. When you complete these entries, save your work.
8. To check the correctness of your entries of amounts withheld, the system adds each amount entered for a tax in the Taxes Withheld region to the net amount entered for the earnings type. If the total does not equal the gross amount entered, you receive an error message and must correct any typing errors.
9. When you save the entries in the Taxes Withheld region and receive no error messages, the system:
 - updates Gross Earnings Subject to Tax balances in accordance with the taxability rules for the earnings type that appear in the Taxability Rules window
 - updates Employee Withheld balances for the taxes with the amounts entered amounts in the Taxes Withheld region.

► **To adjust Employee Withheld balances only:**

1. In the Assignment window, query the employee assignment for which you are entering adjustments to Employee Withheld balances. Open the Adjust Tax Balances window.

The window displays the city, state, zip code and county of the employee's default work location, and the default consolidation set for the payroll of the employee's assignment. You can change these defaults if necessary.
2. For each tax appearing in the Taxes Withheld region, enter the amount of the adjustment.
3. If you want to cost the balance adjustment, check the Costed check box and select the Costing field. This allows you to enter costing details by using the Cost Allocation key flexfield. When you complete these entries, save your work.

The system then updates Employee Withheld balances for the taxes with the amounts entered in the Taxes Withheld region.

Adjusting a Balance UK

The Adjust Balance window has now been enhanced. You can now cost balance adjustments and transfer them to General Ledger accounts.

There are new fields to enable you to cost balance adjustments on the Adjust Balance window.

► **To adjust a balance:**

1. Query the assignment for which you want to adjust the balance.
2. Set the effective date to when you want to adjust the balance.

The window displays your current effective date. If the assignment is to a payroll, it also displays the corresponding payroll processing period.

3. Select the element whose pay or input values you want to change, and update the entry values as you require.
4. Select a consolidation set to control further post-run processing.

The default consolidation set displays automatically but you can select another set. This is a required field even for balance adjustments that do not require further post-run processing.

5. Check the Costed check box and select the Costing field if you want to cost the balance adjustment. This enables you to enter costing details by using the Cost Allocation key flexfield.
6. Save your entry.

Oracle Payroll applies the adjustment by creating a processed run item equivalent to the adjustment value you entered. The option buttons display the progress of the adjustment's processing.

Note: If the transaction finally shows Error, check that the units of measure for the entry values are correct. If they are, consult your system administrator.

Batch Element Entry



Attention: The term BEE (Batch Element Entry) refers to the batch transfer process for element entries. The term MIX (Mass Information Exchange) is a general term referring to all Oracle HRMS mass information transfer processes, including BEE, PayMIX and ADE.

BEE

BEE now enables you to do the following:

- Rollback

You can rollback the BEE transfer process for newly inserted element entries. You cannot rollback element entries that have been updated.

See: Rolling Back a BEE Process, *Oracle Human Resources User's Guide*.

Note: This is only available through the standard Submit Requests window.

- New batch process and window

On the Batch Header window you can now create batch lines for whole assignment sets using the Create Batch Lines window. This speeds up the process of making batch element entries for BEE processing.

See: Creating and Updating Batches of Element Entries, *Oracle Human Resources User's Guide*.

Note: This functionality is also available to HR-only customers.

Career Management

Career Management

This new functionality is built upon the emerging disciplines of performance management and the competence approach. This gives a single, unified model and language for traditionally different activities (such as appraisals, assessment, recording accomplishments, and such). By using this one approach, you can:

- operate more effectively at work
- perform key human resource management processes consistently across the enterprise
- achieve clearly defined business goals within a common framework

A common framework for describing and assessing competencies speeds the deployment process within your enterprise. This is both cost-effective and desirable. Imagine how quickly your managers can respond to new challenges when they can identify and select employees and applicants on a common basis—they can also match employees and applicants with opportunities that arise across the whole enterprise. This ability to perform global deployment effectively, through a 'virtual job market', provides your enterprise with the competitive edge with deployment. Consider being able to create opportunities in the US and recruit globally using common terminology to build up teams with complementary skills.

Oracle Human Resources provides you with web and workflow-based access for many line manager and employee end-user activities through an intuitive, easy-to-use interface. Alternatively, you can perform many activities using standard Oracle HRMS windows.

See: *Introducing Career Management Activities, Oracle Human Resources User's Guide.*

Note: The Career Management information is likely to change during the Release 11 cycle.

COBRA Administration

COBRA Upgrade

COBRA functionality has been upgraded to be more compliant with US legislation. COBRA functionality now provides more supported qualifying events, and greater coverage for existing qualifying events.

Changes to COBRA include:

- Multiple dependents are now covered. Dependents can be a child born, adopted, or fostered during an employee's COBRA coverage. This enables an employee to declare a new born child or fostered child as a dependent and thus be part of the coverage plan. This includes dependent children of a legal spouse.
- The minimum number of grace days has increased to 30 from the time of the qualifying event.
- Military service is now a qualifying event for COBRA coverage.
- Employer bankruptcy is now a qualifying event for COBRA coverage.
- Disabled employees are allowed an additional 11 months of COBRA coverage.

See: COBRA Overview, *Oracle Human Resources User's Guide*.

Compensation

Workers Compensation

Workers Compensation has been enhanced to provide new rates and multiple calculation methods for a single carrier in a single state.

New Rates – There are five new rates, elements and balances instead of two. All five rates are processed using the previous method.

The three new rates are:

- One employee rate
- Two employer rates

Oracle Payroll now supports separate rates, balances and elements for states where the employer and employee have multiple Workers Compensation deductions and liabilities. No surcharges, premium discounts or experience modifications are made to the new balances.

Multiple Calculation Methods – This enables you to perform different calculation methods for each component. For example, if you set calculation method 1 to Percent of Earnings and set calculation method 2 to Hourly Rate, then Oracle Payroll calculates Employee amount 1 and Employer amount 1 using the Percent of Earnings method and calculates Employee amount 2 and Employer amount 2 based on Hourly Rate.

The calculation methods default as follows:

- Component 1: Use calculation method 1. If none is specified, default to percent of subject earnings
- Component 2: Use calculation method 2. If none is specified, default to percent of subject earnings
- Component 3: Use calculation method 3. If none is specified, default to percent of subject earnings

Employer portion 1 must use the same method as employee portion 1, and employer portion 2 must use the same method as employee portion 2.

You can also selectively include overtime hours on a state by state basis if one of the calculation methods is hourly rate.

See; Workers Compensation, *Oracle Human Resources User's Guide*.

Custom Library

Custom Library Calls

All windows contain some calls to Custom Library. For a list of event points for these calls, see: Events Passed to the Custom Library, *Oracle Human Resources User's Guide*.

In certain windows we have created *additional* event points that are passed to the Custom Library. These event points are as follows:

WHEN-CREATE-RECORD

POST-QUERY

KEY-DELREC

PRE-UPDATE

PRE-INSERT

PRE-DELETE

POST-INSERT

POST-UPDATE

POST-DELETE

POST-FORMS-COMMIT

WHEN-BUTTON-PRESSED

NAVIGATE

The NAVIGATE event is passed to the CUSTOM library whenever a user selects a task flow navigation option and before opening the new window. The following field values are set for the duration of this event:

- CTL_GLOBALS.DESTINATION_FORM
- CTL_GLOBALS.DESTINATION_BLOCK

You can use this event to supplement the validation that takes place when a task flow navigation option is selected.

The windows which have this additional support added for CUSTOM library calls are as follows:

Combined Person and Assignment (PERWSHRG)

Define Position (PERWSDPO)

Person (PERWSEPI)
Enter Assignment (PERWSEMA)
Terminate Employee (PERWSTEM)
Salary Administration (PERWSEPY)
Special Information (PERWSPDC)
Define Location (PERWSLOC)
Define Organization (PERWSDOR)
Define Job (PERWSDJT)
Absence Information (PERWSEAD)
Element Entry (PAYWSMEE)
Enrollment Agreement (OTATAEDB)
Customers for Restricted Event (OTARSEEA)
Scheduled Event (OTARSEES)
Programs (OTARSEEP)
Event Search (OTATASAV)
Resource (OTARSDSR)
Book Resources (OTARSERB)
Finance Headers (OTATAEFI)
Enrollment Details (OTATAEBD)

Elements

Adjusting a Pay Value

The functionality has been enhanced to enable you to remove all adjustments, if required.

In Step 2, in the section *Entering Elements, Adjusting a Pay Value*, we have now explained how you can select None as an adjustment from the adjustment pop-up list. This removes any existing adjustments.

You can now do either of the following:

- Remove an adjustment that has been incorrectly entered.
- Update an existing adjustment. For example, if you want to update an Add adjustment to a Subtract adjustment it is only possible to do this by firstly removing the Add adjustment and then creating the Subtract adjustment.

FastFormula

Registering a Function

The Formula option has been removed from the Class field on the Define Function window. You can now enter only External function and User Defined Function classes.



Suggestion: The User Defined Function option is likely to be phased out in future releases, therefore we suggest you use the External function option instead. This has the same functionality as the User Defined Function option.

Hiring People

Hiring and Rehiring Applicants and Ex-Employees

The hiring process has been enhanced to support a wider range of business needs, such as back-to-back employment. It also provides you with better validation, for example, you cannot rehire an ex-employee if the final process date for the previous employment is still blank. This validation ensures that the information held in the database is always correct, and date-tracked.

Hire Date Rules for Applicants and Ex-Employees

HRMS now provides the following general rules. The **hire date** for Applicants and Ex-Employees must be:

Hiring an Applicant

	Minimum Hire Date:
Either:	1 day after the application has been accepted
Or:	The day after the last of any future-dated changes

Rehiring an Ex-Employee

	Minimum Hire Date:
Either:	1 day after the final process date of the previous employment
Or:	The day after the last of any future-dated changes

Rehiring an Ex-Employee (Back-to-Back Employment)

	Hire Date Must Be:
	The day after the final process date (the final process date must also be the same as the actual termination date)
And:	No future-dated changes can exist

Setting Hire Dates and Future-Dated Changes

HRMS provides you with the flexibility to make future-dated changes to a person's details. If you make future-dated changes to an

applicant's details, such as changing their name, and you subsequently hire the person, the minimum hire date you can enter is the date of the last change, plus an additional day. The hire date can, of course, be any date into the future (provided it is after the date of the last change plus an additional day).

For example, if you received an application on January 10th and you changed the applicant's details using future-dates, say on January 22nd and February 10th and you subsequently hire the applicant, the earliest hire date you can enter is February 11th (the date of the **last** change plus one day).

Alternatively, you could hire the applicant (change their person type to Employee), and then make the changes to their details with the status of Employee.

Rehiring an Ex-Employee

You cannot rehire an ex-employee if the final process date for the previous employment is still blank. If you are rehiring an ex-employee, you need to check that the final process date (on the Terminate window) is entered before you rehire the ex-employee.

You can, however, rehire an ex-employee, providing that the hire date is at least 1 day after the final process date of the previous employment, or the day after the last of any future-dated changes.

Back-to-Back Employment

In some circumstances, you might need to rehire an existing employee into another role within your enterprise the day after the previous role ended. This is sometimes known as back-to-back employment (or a back-to-back contract). Back-to-back employment occurs when there is no period of ex-employment between two periods of service.

To create back-to-back employment, you terminate an existing period of service and enter a new period of service on the day after. For example, an employee starting new employment on April 1st must have an actual termination date **and** a final processing date (for payroll processing) for Employment A on March 31st. (If your enterprise does not have Oracle Payroll, the final processing date automatically defaults from the actual termination date for you).

Note: You cannot change the hire date of any back-to-back employment. Instead, you must cancel the hire and re-hire the employee.

Cancelling a Hire

After you have cleared the Hire Date field and saved your work, the application warns you that any changes made to the person's records after their hire date will be lost. If you continue, all employee records are deleted, and the person type changes to Applicant.

The applicant data history is retained.

Changing the Hire Date, Rehiring an Ex-Employee and Hiring an Applicant

The following steps describe how you change the hire date, rehire an ex-employee and hire an applicant.

Changing the Hire Date

- ▶ **To change the hire date:**
 1. Query the person in the People window.
 2. Change the hire date. The hire date must fall within the general rules:
 - It must be within an active period of service
 - There must be no actual termination date or final payment date
 - It must be between the last change (person type or attribute change) plus a day, and any future-dated changes (person type or attribute change) minus a day
 - None of the hire or re-hire rules are broken
 3. Save your changes.

Hiring an Applicant

- ▶ **To hire an applicant:**
 1. Update the applicant assignment status to Accepted in the Application window.
 2. Set your effective date to the applicant's hire date.

Note: If future-dated changes exist, the hire date is the date of the last change plus at least one day. If no future-dated changes exist, the minimum hire date is the accepted date, plus one day.

3. Query the applicant in the People window.
4. Select Employee in the Type field. The Hire Date field displays your effective date.
5. Save your work.

Rehiring an Ex-Employee

► To rehire an ex-employee:

1. Set your effective date to the new hire date. Ensure that there is at least one day between the previous and new period of service.
2. Query the ex-employee in the People window.
Note: You cannot rehire an ex-employee if the final process date for the previous employment is still blank. Check that the final process date (on the Terminate window) is entered before you rehire.
3. In the Type field, select Employee. The Hire Date field displays your effective date.
4. Save your work.

► To rehire an ex-employee (back-to-back contract):

1. Query the person in the People window.
2. Set your effective date to the applicant's required hire date. The hire date must be the final process date (and actual termination date) plus one day.
3. Save your changes.

Locations

New Cities and Ranges of Zip Codes

You are now able to enter new ranges of zip codes for new cities and existing cities, as well as entering new cities using the Cities window. You can now:

- Enter a range of zip codes

Whereas previously, the window only allowed a single zip code to be entered, it is now possible to enter a range of zip codes.

- Add new zip codes to existing or user-defined cities
- Enter new cities

The validation carried out for new cities has been relaxed. For example, if you think a city exists in county B, you can enter that city in county B even if the city is already stored as county A on the database.

- Delete user-entered zip codes for user-entered cities

See: Adding a City for Addresses, *Oracle Human Resources User's Guide*.

Menus

FastPath – New Menu Feature

You can now call directly from the menu certain windows that are normally available only in task flows. A Find window displays, enabling you to select the Person or Assignment you want to see.

The following windows now have FastPath access from the main menu:

US

- Accruals (PAYACVEA)
- Benefits (PERWSVBI)
- Employee Balance (PAYVWELE)
- Taxes (PAYVWTAX)
- US Address (PERUSADR)
- US Statement of Earnings (PAYUSSOE)
- US Tax (PAYEETAX)

UK

- UK P45 (PAYWSR45)
- UK Statement of Earnings (PAYGBSOE)
- UK Tax Statement (PAYGBTAX)

Common

- Absence Information (PERWSEAD)
- Address (PERWSADR)
- Adjust Balances (PAYWSABL)
- Application (PERWSAPA)
- Assignment (PERWSEMA)
- Assignment Budget Values (PERWSABV)
- Assignment Costing (PERWSEAC)

Contact Information (PERWSDPC)
Element Entry (PAYWSMEE)
Employee Review (PERWSERW)
End Application (PERWSTAP)
End Employment (PERWSTEM)
Event for Person (PERWSBEP)
External/Manual Payments (PAYWSMEP)
Grade Step Placement (PERWSSPP)
Pay Method (PAYWSEPM)
Phone Numbers (PERWSPHN)
Picture (PERWSIMG)
QuickPay (PAYWSRQP)
Reverse Payroll Run (PAYWSRPR)
Salary History (PERWSSLH)
Salary Review (PERWSEPY)
Secondary Status (PERWSSAS)
Special Information (PERWSPDC)

Payroll Processes

RetroPay by Run

RetroPay by Run is an additional RetroPay process available in Release 11. If you enable RetroPay by Run in addition to the existing RetroPay process, the existing RetroPay process is renamed to RetroPay by Aggregate.

Note: To enable RetroPay by Run, contact Worldwide Support.

The differences between RetroPay by Run, and RetroPay by Aggregate are as follows:

- RetroPay by Run enables you to see how back dated changes are distributed across individual processes. This produces one result for every run being reprocessed. These multiple results appear in the current pay period and not in the previous pay periods to which they apply.

For example, if an employee receives a March salary increase of 300 back dated to January, then RetroPay by Run enables you to see modified salary statements for January February and Mar

- RetroPay by Aggregate combines all back dated adjustments into a single entry for each balance.

For example, if an employee receives a March salary increase of 300 back dated to January, then RetroPay by Aggregate will only calculate the total backpay of 300. You cannot see how the 300 total has been distributed across each of the three months from January to March.

See: RetroPay Process, *Oracle Payroll User's Guide*.

Reports (HR)

EEO-1 and VETS-100 Reporting

EEO-1 and VETS-100 Reporting has been enhanced to provide you with the following:

EEO-1

- The ability to enter the date range for the payroll period and audit periods.
- Greater relevance once you select an establishment hierarchy as one of the parameters (only GREs for that hierarchy are now displayed).
- Direct access to the Headquarters report from the Submit Requests window, rather than via the EEO Individual Establishment report.

VETS-100

- Greater relevance once you select an establishment hierarchy as one of the parameters (only GREs for that hierarchy are now displayed).
- The ability to suppress printing information in the grayed out areas in the VETS-100 report. For example, you can suppress printing of totals (line 23, columns L through M) and for new hires (lines 14 through 22, columns N, O and P). All other information is automatically displayed.
- Production of reports even if no employees meet the criteria you enter.
- Direct access to the Headquarters report from the Submit Requests window, rather than via the Veterans Employment report.

Reports (Payroll)

State Quarterly Wage Listing (SQWL)

The State Quarterly Wage Listing process now produces an additional report, called the SQWL Detail Report. This provides you with a paper copy of all employees that have been written to the magnetic tape.

The report is sorted by State SUI Account Number, and provides employer totals for:

- Number of employees, by month
- Wages in excess of limit for Quarter
- Taxable Wages for Quarter
- Tax Due
- State Income Tax Wages for Quarter
- State Income Tax Withheld for Quarter

This report is produced automatically when you submit the State Quarterly Wage Listing process, in the Submit a New Request window.

See: State Quarterly Wage Listing, *Oracle Payroll User's Guide*.

End of Year Reporting US

There are now several new reports to assist with your reconciliation and balancing. Although the reports are primarily to support year-end processing, you'll also find them useful each pay period, each month and each quarter. You can, of course, run them at other times, as needed.

The new reports are:

- Employee Run Results
- Taxable Balance Verification
- Invalid Address Information
- GRE Totals
- Negative Balances

The State W-2 Magnetic and State Quarterly Wage Listing Magnetic reports have enhanced to provide additional storage formats and media.

940 Worksheet

To enable you to determine your FUTA taxable wages for the calendar year and the FUTA tax liability on those wages after accounting for applicable state unemployment tax credits and FUTA tax deposits made during the year.

If you are covered by FUTA, you must report your liability annually on Form 940 – Employer’s Annual Federation Unemployment (FUTA) Tax Return.

941 Worksheet

To enable you to correctly complete your quarterly Report of Income and Employment (FICA) taxes each quarter. You must complete this report if you withhold federal income tax from employee compensation and are subject to withholding and payment of Social Security and/or Medicare taxes.

Multiple Worksite magnetic

To provide a magnetic report of employee counts by month and wages by quarter

1099R Reporting Enhancements

US tax reporting capabilities have been enhanced by providing you with further tools for 1099R reporting:

1099R

To provide a magnetic report for pensions payments (only from qualified pension trusts) in a federal or state format

1099R

To provide a paper record to give to the pensioner

1099R reporting is available for both magnetic reporting and paper reporting from the Submit a New Request Window.

Employee Run Results Report US

This report displays the payroll run results for a named employee. Run it to help you reconcile conversion, quarter-end, year-end or pay period out-of-balance issues.

You can view the results for an employee, for the employees associated assignment or all assignments, or for the employees associated GRE or all GREs. You can also limit the run to specific classifications, earnings, employer taxes, for example, or include all classifications in the results.

Output

The report includes any payroll actions for the employee, including initial balance loads, balance adjustments, reversals and quickpay (regular or supplemental). The results include:

- Employee Name
- GRE Name
- Classification of Element
- Element Category
- Assignment Number
- Effective Date of Run Result
- Assignment Action Id of Run Result
- Element Name
- Jurisdiction Code
- Run Result Value

You run this report in the Submit a New Request window.

► **To run the Employee Run Results report:**

1. Select the report name in the Request Name field.
The Parameters window opens.
2. Enter the range of dates (start and end dates) within which to display the payroll run results for the employee.
3. Select the employee to include in the report.

4. Select the Assignment Number only if you want to include payroll run results for the employee and associated assignment in the Assignment Number field. Leave this field blank if you want to include all the employee's assignments in the results.
5. Select the GRE only if you want to include payroll run results for the employee and associated GRE in the Government Reporting Entity (GRE) field. Leave this field blank if you want to include all the employee's GREs in the results.
6. Select the classifications, if you want to limit the run to specific classifications, earnings, employer taxes, for example. Leave this field blank if you want to include all classifications in the results.
7. Choose the OK button.
8. Choose the Submit Request button.

Taxable Balance Verification Report

This report identifies incorrect withheld amounts for Social Security, Medicare, FUTA, SUI and SDI taxes.

Run the Taxable Balance Verification report before you run your quarter and annual reports:

- State Quarterly Wage Listings
- State W-2s
- Wage and Tax Statement (Federal W-2 tape)

Incorrect Withheld Amounts

If any of the following taxable times the rate does not equal the amounts withheld, they are listed:

- GRE Name
- Employee Name
- Employee Number
- Balance Name
- Balance Dimension (YTD/QTD)
- Taxable Balance
- Tax Withheld
- Calculated Tax Withheld

- Difference
- 401(k)

You run this report in the Submit a New Request window.

► **To run the Taxable Balance Verification report:**

1. Select the report name in the Request Name field.
The Parameters window opens.
2. Enter the range of dates (start and end dates) within which to include incorrect withheld balances in the report.
3. Select the GRE to include in the report. Leave this field blank to include all GREs in the report.
4. Select the Tax type to include in the report. Leave this field blank to include all Tax types (SS, Medicare, FUTA, SUI and SDI) in the report.
5. Choose the OK button.
6. Choose the Submit Request button.

Invalid Address Information Report

This report lists people with invalid primary addresses, for example, addresses that are non-contiguous, non-GEO code acceptable or that do not fully cover a person's employment.

You run this report in the Submit a New Request window.

► **To run the Invalid Address report:**

1. Select the report name in the Request Name field.
The Parameters window opens.
2. Enter the range of dates (start and end dates) within which to display people with invalid addresses.
3. Select an individual GRE, or leave this field blank to include all GREs in the results.
4. Choose the OK button.
5. Choose the Submit Request button.

GRE Totals Report

This report helps you to balance W-2s. It lists totals for selected, or all, GREs. Run this report in conjunction with the control report (6559) produced with the Wage and Tax Statement report.

The F and T record of the magnetic tape can be dumped and balanced back to this report.

Output

For each GRE, the following W-2 box totals will display:

- GRE Name
- Federal Identification Number
- Federal Gross Wages
- Federal Wages, Tips, Other Compensation
- FIT Withheld
- SS Taxable
- SS Withheld
- Medicare Taxable
- Medicare Withheld

For each state within the GRE, the following W-2 box totals displays:

- State (two character alphabetic abbreviation)
- State Tax District Identification Number
- State Gross Wages
- State Wages, Tips, Other Compensation
- SIT Withheld

You run this report in the Submit a New Request window.

► **To run the GRE Totals report:**

1. Select the report name in the Request Name field.
The Parameters window opens.
2. Enter the range of dates (start and end dates) within which to display the GRE totals.
The dates you identify include amounts related to tax from all processes with paid dates within the range.
3. Select an individual GRE, or leave this field blank to include all GREs in the results.
4. Choose the OK button.
5. Choose the Submit Request button.

Negative Balances Report

This report enables you to see negative year-to-date and/or quarter-to-date balances. Submitting quarter and annual reports to government agencies with negative balances exposes employers to audit and penalties.

Run the Negative Balances report before you run your quarter and annual reports:

- State Quarterly Wage Listings
- State W-2s
- Wage and Tax Statement (Federal W-2 tape)

You can choose to retrieve negative quarter-to-date balances, or negative year-to-date balances.

Negative Balances

If any of the following balances are negative, they are listed:

- FIT, SIT and LIT (reduced subject withholdable and subject not withholdable)
- FIT, SIT and LIT (taxes withheld)
- Social Security wages
- Social Security taxes withheld
- Medicare wages
- Medicare taxes withheld
- FUTA gross wages
- SUI reduced subject wages
- SUI taxes withheld
- SDI reduced subject wages
- SDI taxes
- Advanced EIC paid
- 401(k)

You run this report in the Submit a New Request window.

► **To run the Negative Balances report:**

1. Select the report name in the Request Name field.

The Parameters window opens.

2. Enter the range of dates (start and end dates) within which to include negative balances in the report.
3. Select the GRE to include in the report. Leave this field blank to include all GREs in the report.
4. Select the Organization to include in the report. Leave this field blank to include all Organizations in the report.
5. Select the Quarter-to-Date Time Type to retrieve negative quarter-to-date balances, or Year-to-Date to retrieve negative year-to-date balances.
6. Choose the OK button.
7. Choose the Submit Request button.

End of Year Reporting UK

The Gross to Net Summary report has been rewritten, and there is a new report to assist with your reconciliation and balancing. Although these reports are primarily to support year-end processing, you'll also find them useful each pay period, each month and each quarter. You can, of course, run them at other times, as needed.

The Gross to Net Summary report has been rewritten to create two new reports: the Gross to Net Summary Report GB and the Payments Summary Report.

The Gross to Net Summary Report GB now has new balances and balance initialization:

- Pay values for elements of the type Direct Payment are totalled and held in Total Direct Payments
- Pay values for elements of the type Employer Charges are totalled and held in Total Employer Charges

The new report is Employee Run Results Summary.

See Also

Gross to Net Summary Report, Payments Summary Report, *Oracle Payroll User's Guide*

Employee Run Results Summary Report UK

This report displays all assignments for a given payroll, one assignment per line. You can view the results for an assignment number, by employee first name or surname.

Output

The report includes all assignments, gross pay, PAYE, employee's NI contribution, employer's NI contribution, other deductions, total deductions, net pay and total pay for the payroll.

You run this report in the Submit a New Request window.

► **To run the Employee Run Results Summary report:**

1. Select the report name in the Request Name field.
The Parameters window opens.
2. Select the payroll name to include in the report.
3. Select the time period identification to include in the report.
4. Select the consolidation set to include in the report.
5. Select the sort order; either assignment number, employee first name or surname.
6. Choose the OK button.
7. Choose the Submit Request button.

Personal Information

Telephone Numbers on the Person Window

The Work Telephone field is no longer stored on the Person table, or maintained through the Person window. It is now maintained in the new Phones table, and through the task flowed Phones window.

The Phones window enables you to hold multiple telephone numbers of different types for people. These may include work numbers, home numbers, mobiles, fax numbers, and such. You can add your own phone types.

Telephone numbers may still be held directly on addresses as well. These are held independently of the personal phone numbers, to cater for customers who want to associate the telephone number directly with an address.

See: Adding Telephone Numbers, *Oracle Human Resources User's Guide*.

Deleting People from the System (Contacts)

Oracle HRMS now does not delete a contact if he or she has a contact relationship with another person.

In the Delete Person window, if you delete Person A then Person B, who is the contact of the person you are deleting, is automatically deleted as well only if:

1. Person B is not also the contact of another person (whether of type Employee, Applicant or Other).
2. Person B has no other assignment or applicant details in addition to personal details entered on the database.

If Person B has assignment or applicant information set up, this person is not deleted, but the record of his or her relationship to Person A is removed.

Note: If you use the Delete Person window to delete a person set up as a contact, Oracle HRMS removes all records of that contact and any relationships.

Positions and Vacancies

Ending a Position

The functionality has been enhanced to provide more flexibility around defining a position and amending the end date.

If you amend the end date for a position for which grades are attached, Oracle HRMS checks if any of the valid grade end dates are later than the end date of the position. If they are, it amends the 'valid' grade end date for that position so that it matches the position end date. For example, if the grade is valid from the 01-JAN-1900 until 01-JAN-2000 and you amend the position end date to 01-JAN-1999, the end date of the grade for that position is re-set to 01-JAN-1999.

If you remove the end date of a position, Oracle HRMS finds the valid grades for that position with the same original end dates and removes these dates as well.

Using HR Direct Access to Advertise Vacancies

Oracle HRMS now provides you with enhanced functionality to enable you to advertise vacancies using HR Direct Access. This self-service approach enables employees and line managers to view vacancies at a glance.

To enable you to advertise vacancies using direct access, you first define your enterprise's vacancy categories using the QuickCode Type `VACANCY_CATEGORY`. Then, when you are entering the vacancy information using the Requisition and Vacancy window, you complete the following new field:

Vacancy Category Select a vacancy category if you want to advertise the vacancy under a category using HR Direct Access.

Salary Administration and Budgeting

Salary Administration

There are major enhancements to the Salary Administration functionality, including changes to the Salary Administration windows.

See the following:

- Using the Salary Administration Window – Changes: page 2 – 94
- Using the Salary Basis Window – Changes: page 2 – 96
- Viewing Salary History – Changes : page 2 – 98
- Performance Ratings – Changes: page 2 – 98

If you want to see the Performance window in your user defined task flows created before Release 11, you must add the Performance window.

See: Adding the Performance Window to User Defined Task Flows: page 2 – 99

Using the Salary Administration Window – Changes

The main changes to the functionality and to the Salary Administration window include:

- More information is displayed. For example, minimum or maximum salary information for a grade, the currency in which the salary is paid, greater salary and pay basis information and annual salary details.
- More information can be entered. For example, you can rank the employee at the time of the proposal and track them later on.
- You no longer have to delete each component individually. They are deleted when you delete the proposal.
- The Performance window is now available from both the Salary Administration and Assignments window. (From the Assignments window, select Others then Performance).

► **To enter a salary for a new employee (or one assigned to a new salary basis):**

1. Enter the start date for the salary in the Change Date field (in the Salary Proposal region). For a new hire, this is usually the hire date.

Note: The employee must have an active assignment on this date.

2. Enter the amount of the salary **in either** the Change Value or the New Value field.
3. Select a reason for the salary, if required.
4. Rank the employee if required. For example, you might want to rank the employee at the time of the proposal and track them later on. If you do rank the salary, enter a value greater than zero.
5. Enter or change the Next Review date, if required.
6. Select a performance review to associate with the salary review, if required. This is a performance review you previously created using the Performance window.

Saving the Salary

7. Save the new salary.

Note: You do not have to approve the new salary, Oracle HRMS approves it automatically.

► To propose a salary change for a current employee:

1. Enter the date when the new salary comes into effect in the Change Date field in the Salary Proposal region.

Note: If you are changing the salary basis, you must enter the exact date it changes.

2. Enter a salary proposal as **one** of the following:
 - a new amount
 - a single change amount or percentage
 - multiple change amounts or percentages

For example, to reflect different reasons, such as a merit award and a cost of living component.

Entering a New Amount or the Amount of Percentage Change

3. Enter a new salary amount, or the amount or percentage of the proposed change in the Salary Proposal region.
4. You can select a reason for the overall salary change.
5. You can approve the proposal, by checking the Approved box, if you have the authority.

Entering Multiple Components

6. Select the reason for each component of the proposal.

7. Select either the amount or percentage of each proposed change. Each percentage is applied to the last approved salary. For example, if the last approved salary is 3000 and there are two components of 10% and 5%, the new amount is $3000 + 300 + 150$.

Note: To effect a salary decrease, enter a negative number in the Change Amount or Change Percent field.

8. You can approve each component, by checking the Approved box independently. However, none of the approvals go into effect until you approve the overall proposal.

Changing Other Information

9. Enter or change the Next Review date, if required. (If you entered a time period for regular salary reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically.)

Saving Your Proposal

10. Save your proposal.

► **To approve a salary change:**

1. Query the proposal.
2. Check the Approved box in the Salary Proposal region, and save.

If some individual components were not already approved, you are warned and they are automatically approved if you continue.

Using the Salary Basis Window – Changes

The main changes to the Salary Basis window are one new field, (Pay Annualization Factor), and one changed field (Grade Annualization Factor).

► **To define a salary basis:**

1. Enter an appropriate name for the salary basis.

US Only

2. Select a pay basis. For the element Regular Salary, select the basis Monthly Salary. For the element Regular Wages, select the basis Hourly Salary. For any other elements created for use in salary administration, select the salary basis Annual Salary or Period Salary.

Note: This is for information only. For example, to enable you to compare salaries.

3. Select the element Regular Salary and the input value Monthly Salary, or the element Regular Wages and the input value Rate.

When you enter a monthly salary amount in the Salary Administration window for an employee receiving the earnings Regular Salary, the entry goes to the input value Monthly Salary. When you enter an hourly wage amount in this window for someone receiving the earnings Regular Wages, the entry goes to the input value Rate.

If you have created other elements that are to receive entries through salary administration, you can also select one of them here, together with the input value that is to receive entries using salary administration.

Core/All

4. Select a pay basis, for example, Annual or Hourly.

If you selected Annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Pay Annualization Factor field. You can change this value, if required.

If you selected Hourly or Period, the Pay Annualization Factor field is blank. Enter your own values, if required.

Note: This is for information only. For example, to enable you to compare salaries.

5. Select the name of the salary element and input value associated with this salary basis.

6. Optionally, select a grade rate to associate with the salary basis.

Oracle HRMS uses the grade rate to validate your salary proposals. You receive a warning if the salary you enter for an employee is not within the grade rate range defined for the employee's grade.

In doing this check, the system takes account of the hours in the employee's standard work week. It compares the hours on the employee's assignment with those entered for his or her organization.

US Only

In doing this check, the system takes account of the hours in the employee's regular workweek. It looks at the hours on the employee's work schedule, or if there is none, at the regular working hours per week entered on the employee's assignment, and compares them with those entered for his or her organization.

Core/All

If the employee works fewer than the standard hours per week for the organization, the system prorates the permissible minimum and maximum grade rate values before validating the salary.

7. Select the grade rate basis (Hourly, Monthly, Annual, or Period) for the rate if you selected a grade rate. For example, if your grade rate specifies the valid *monthly* salary ranges for each grade, select Monthly Salary in the Grade Rate Basis field.

If you selected Annual or Monthly, Oracle HRMS identifies the number of payments and enters 1 or 12 in the Grade Annualization Factor field. You can change this value, if required.

If you selected Hourly or Period, the Grade Annualization Factor field is blank. Enter your own values, if required.

Note: This is for information only. For example, to enable you to compare salaries within grades.

8. Save your changes.

Viewing Salary History – Changes

The Salary History folder now has two new fields:

- **Currency Code** which shows the currency in which the salary was paid
- **Ranking** which shows the employee's rank

You can remove, rearrange, add or re-size fields in the folder if you have access to the folder menu.

Performance Ratings – Changes

The Performance window is now available from both the Assignments and Salary Administration window.

Note: You cannot use a performance review entered through the self-service HR Direct Access interface.

► **To enter a performance rating for an existing review:**

1. Select an existing review by one or all the following.
 - date

- location
 - type
2. Select a performance rating.
 3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

► **To enter a new review and performance rating:**

1. Enter the new review date.
2. Select a performance rating, if required.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically)

Adding the Performance Window to User Defined Task Flows

Prior to this release, any user defined task flows which included the Salary Administration form would automatically display the Performance window. Now, because of the changes made to Salary Administration, the Performance form is an independent form which can be accessed via the Salary Administration window or the Assignment window. This affects user defined tasks flows created prior to Release 11, Oracle HRMS no longer automatically displays the Performance window as part of the Salary Administration form in your user defined task flows. Task Flows provided with Oracle HRMS are not effected.

If you want to see the Performance window in your user defined task flows created before Release 11, you must add the Performance window. A new node, PERFREV, has been created for the Performance window, this requires the Assignment (employee) context. Add the PERFREV node to your task flow and amend the navigation path of the task flow to include it.

► **To add a new form to an existing task flow**

The following steps explain how to add a new form, using its node name, to an existing task flow. If you have already used the form in the task flow you only have to amend the navigation, refer to 'To amend the navigation of a task flow'.

1. Enter the task flow you want to amend in the Name field.
2. In the Node block, enter the form's node name.
You must include the new node in the set of nodes you can use in the task flow.
3. Save your changes.
You must now include the node in the navigation path for the task flow.
4. Enter the existing node you want the new node to be accessed from in the Node block.
5. Enter the new node's details in the Navigation Options region, and edit the existing navigation path as required.

► **To amend the navigation of a task flow**

1. Enter the task flow for which you want to amend the navigation in the Name field.
2. Enter the node name in the Node block.
3. Edit the existing navigation path in the Navigation Options region, as required.

Date Tracking Assignment Budget Values

The Date Tracking facility has been added to the Assignment Budget Values window enabling you to create and view a history of your assignment budget values.

Two new fields have been added to the Assignment Budget Values window:

Effective Date From	This displays the effective dates of the assignment budget value and cannot be amended.
Effective Date To	This displays the effective dates of the assignment budget value and cannot be amended.

Security Profiles

Profile Options

There are enhancements to profile options.

New HR:Security Profile User Profile Option

We have changed the way a security profile is associated with a responsibility. You associate a security profile with a responsibility by setting a new user profile option called HR: Security Profile.

When you set the HR:Security Profile profile option for a responsibility, the HR:Business Group profile option is defaulted to the Business Group of the security profile chosen earlier.

During the upgrade to Release 11, the HR:Security Profile profile option is set for all responsibilities for which the HR:Business Group profile option has been set. Responsibilities that connected to a secure Oracle user in Release 10 are given the restricted security profile that corresponds to the datagroup held against that responsibility in Release 10.

See: Setting Up Security in Oracle HRMS, *Oracle Human Resources User's Guide*.

HR:Business Group Profile Option

HR Business Group Profile Option is now a read-only profile option, defaulted from the new HR:Security Profile profile option. It now exists at only Site and Responsibility level. In Release 10 it was possible to set it at Application Level.

During the upgrade to Release 11, application level settings for the HR:Business Group profile option are replaced by responsibility level settings.

Restricted Security Profile

Oracle HRMS users with a restricted security profile now connect to the same Oracle user as those with an unrestricted, or View All, security profile: the APPS Oracle user.

Reporting users are unaffected by this enhancement. As in previous releases of Oracle HRMS, you can optionally create a read-only reporting Oracle user for each restricted security profile. This enhancement simplifies the administration of security profiles. It is no longer necessary to maintain secure Oracle users for every restricted security profile. The Generate Secure User process is now run only if you are creating reporting users.

Line Manager Direct Access users have access to the security profiles defined through Oracle HR.

Renamed Secure Views

Secure Views which had a `_SECV` suffix in Release 10, have been renamed and restructured to use a PL/SQL function. If you connect to the APPS Oracle user through SQL*Plus, the secure views return an unrestricted set of data.

If you connect to a reporting Oracle user, the data returned by the secure views is restricted according to the definition of the security profile associated with the reporting Oracle user.

Changes to Average Earnings Calculations

You can now specify an earnings period to which a particular payment applies. This supports the statutory change whereby average earnings must now be calculated by dividing payments by the number of weeks actually covered by the payments rather than by the number of weeks in the pay period.

The change has been introduced to correct the discrepancies that can occur if payments are made in advance or in arrears for employees who are paid weekly. This is because the number of weeks in the pay period will not correspond to the number of weeks covered by the payment. It is now possible to specify the number of pay periods that a payment relates to.

To allow you to do this, there is a new SSP/SMP element called Average Earnings Periods. It has an input value of Periods, and operates as follows.

If an employee receives two weeks advance pay prior to going on two weeks holiday, then you would make the following entries:

- For Week 1 the employee receives Normal Pay plus two weeks holiday pay.
Action: Set the element Average Earnings Periods to 3 periods.
- For Week 2, the first week of the holiday, the employee has already received an advance payment.
Action: Set the element Average Earnings Periods to 0 periods.
- For Week 3, the second week of holiday the employee has again already received an advance payment.
Action: Set the element Average Earnings Periods to 0 periods.

Task Flows

Creating Task Flows Using Oracle Workflow

As an alternative to using forms to set up and maintain task flows, you can model your task flows using Oracle Workflow (version 2.0.3.8.1 or higher) then generate a task flow. This method of creating task flows has the advantage of using a diagrammer to help you design the sequence of windows.

This topic explains how to use Oracle Workflow to create task flows. It assumes you are familiar with the basic procedures for using Oracle Workflow. If you are unsure about using Oracle Workflow, see the Oracle Workflow online help and documentation.

Note: When you create a task flow using Oracle Workflow, you must continue to maintain it using Oracle Workflow. You cannot edit a generated task flow using the Define Task Flow form.

Overview

Oracle HRMS supplies the HR Task Flow item type and a function activity for every window that can be task flowed. You model these into a workflow process for each task flow. By setting activity attributes, you create button labels and the position of buttons on each window.

There are two key rules in defining task flows:

- Only certain windows are valid first windows (or top nodes) in a task flow. To check which windows are valid first windows, check the Lookup Types using Oracle Workflow Designer.

When you create a workflow process to model your task flow, your Start activity must connect to the Top Node Selector activity. This activity ensures that your first window is valid.

- Each window in a task flow can only be connected to a window that supplies the correct context.

For example, the Position Occupancy window requires the context of a position, while the Qualifications window requires the context of a person. Each workflow activity supplied for a window has its Result Type set to a lookup type that defines the

context that must be passed to it. For example, the Enter Address window has the Result Type set to Person Context Windows. This means it must be given the context of a person.

Task flows are associated with one of the following contexts:

- Assignment
- Element Entry
- Job
- Location
- PA Request (Govt HR)
- People
- Position Description (Govt HR)
- Position
- Top node HRMS windows

Procedure

You use the Process Diagrammers within Oracle Workflow to create your task flows. You do this by adding and connecting the windows you want to appear.

► **To model a task flow using Oracle Workflow:**

1. Create processes for the HR Task flow item type.
 - Creating a Top Level Process
 - Creating Sub Processes

Note: You must create a top level process, sub processes are optional.

2. Create button labels, if required.
3. Position buttons, if required.

Combined People and Assignment Form Only

If you are creating task flows using the combined People and Assignment forms, you have additional step to perform:

4. Identify the windows or blocks to display:

Customized Versions of Forms Only

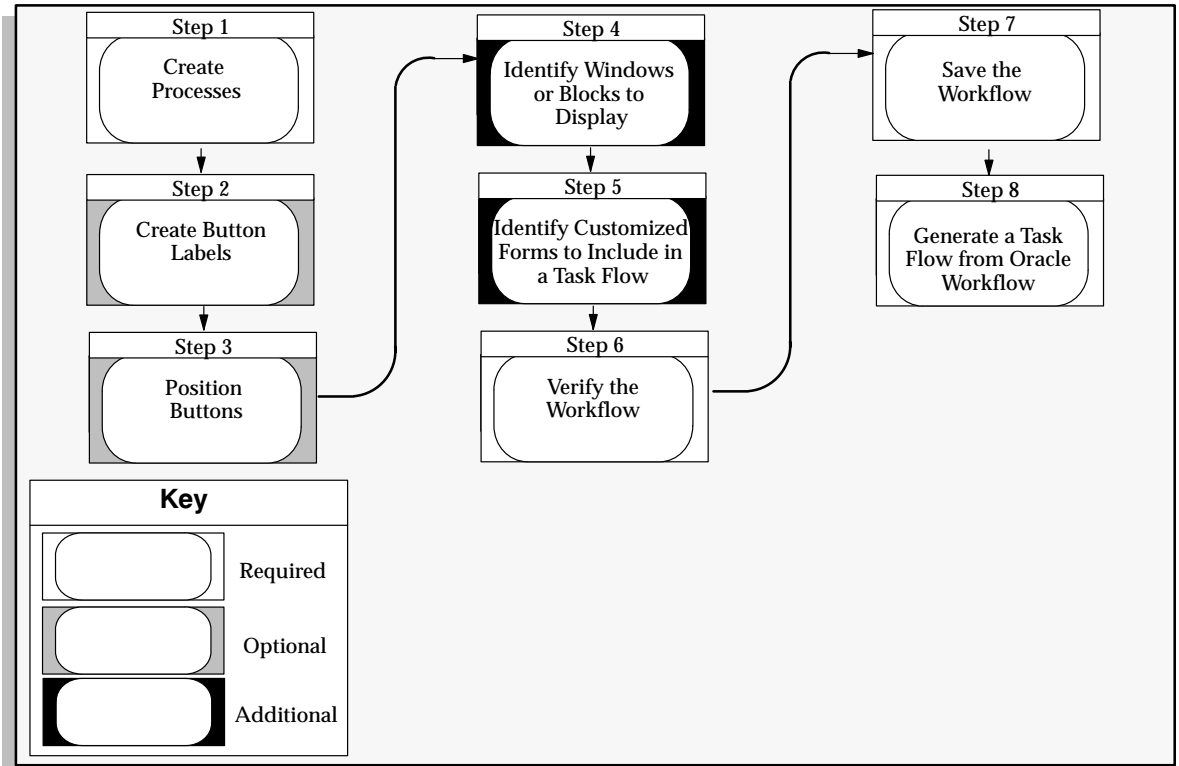
If you have created a customized version of a form, you have additional step to perform:

5. Identify customized forms to include in the task flow.

All Forms

6. Verify the workflow.
7. Save the workflow to the database.
8. Generate a task flow from the workflow.

Figure 2 – 1
Creating Task Flows Using Oracle Workflow



Step 1 – Creating a Process

You use the Process Diagrammers within Oracle Workflow to create your task flows. You do this by adding and connecting the windows you want to appear.

You must create a top level process, sub processes are optional.

Creating a Top Level Process

You must define a top level process for each task flow. The top level process can contain sub processes, but not any other top level processes.

A top level process must have a Top Node Selector activity. This ensures that the first window in a task flow is a valid top node window. All windows that can be a top node are defined within the Top Node HRMS Context Windows lookup type.

The Top Node Selector must have two transitions. The first transition must go to the Top Node activity and its value must be the window activity name. The second transaction must be <Default> and go to the end activity.

Use the Oracle Workflow Builder to create a top level process.

► To create a top level process:

1. Enter a unique internal and display name for the new process for the HR Task flow item type.



Suggestion: Use a naming convention for Internal and Display names. For example, a good internal name might be POSITION_DETAILS_TL with a Display name of Position Details (Top Level).

2. Define the process as runnable.
3. Open the Process Diagrammer window and add one Start activity and at least one End activity
4. Add a Top Node Selector activity. The Start activity must connect to the Top Node Selector activity.
5. Connect the Top Node Selector to the End activity with a <Default> transition result value.
6. Add the Top Node window.
7. Connect the Top Node Selector to the Top Node window, specifying the name of this window activity as the transition result value.
8. Connect the Top Node window to the End Activity with a <Default> transition result value.
9. Add other windows to the process, noting the following rules:
 - A window can only connect to another window where the Result Type is the same (such as, both Person Context windows).
 - The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).

- Each window can only connect once to any other window.
- Each window must be connected to the Top Node window with a <Default> transition result value.
- You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Creating Sub Processes

You can group a logical set of task flow windows into a sub process, which can then be used by several top level processes. This simplifies process modelling. Each sub process can contain other sub processes. There are two rules to note regarding sub processes:

- A sub process cannot be defined as runnable.
- When you use a sub process in another process, you must connect the sub process to the Top Node window.

► To create sub processes:

1. Enter a unique internal and display name for the new process for the HR Task flow item type.



Suggestion: Use a naming convention for Internal and Display names. For example, a good Internal name might be ASSIGNMENT_DETAILS_SL with a Display name of Assignment Details (Sub Level)

2. Define the process as NOT runnable.
3. If the Sub Process requires more than one result value, specify a user defined result set as a Process Result Type.
4. Open the Process Diagrammer window and add one Start activity and at least one End activity

Because a process can have more than one result value, many End activities may be required. At least one End Activity is required to indicate that the process must connect back to the Top Level node window.

5. Connect the Start activity to another window.

Note: The Start Activity can only connect to one window only.

6. Add other windows to the process, noting the following rules:
 - A window can only connect to another window where the Result Type is the same (such as, both Person Context windows).

- The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).
- Each window can only connect once to any other window.
- Each window must connect to an End Activity with a <Default> transition result value.
- You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Step 2 – Creating Button Labels

You can enter the label you want to appear on the task flowed forms, such as Photo (for the Picture window), and such. Each task flow window activity has an attribute called Button Label. Use this attribute to override the default button label for a window and to define an access key (or keyboard shortcut).

► **To create button labels:**

1. Display the process in the Oracle Workflow Process Diagrammer.
2. Select the activity by choosing Edit – Properties. (You can also double click on Edit – Properties to select it).
3. Select the Attribute Values tab frame
4. Enter the label you want to appear on the forms.

Precede the appropriate letter in the label with an ampersand (&) to define an access key. For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, you could enter the label &Photo.

Step 3 – Positioning Buttons

You can position the display order of buttons on the form. For example, you might want the first button to display the Picture window.

The number of task flow navigation buttons that can be displayed on a window varies from window to window. If there are too many navigation options for them all to appear as buttons, the last button on

the window is called Other and it displays a list of values containing the other navigation options.

You determine the navigation options available from a window by defining transitions to other windows in the Process Diagrammer. Now you can use the activity attributes Display Button 1..4 to specify which navigation options should display as buttons and the order in which they should appear.

► **To position buttons:**

1. Display the process in the Oracle Workflow Process Diagrammer.
2. Select the activity by choosing Edit – Properties. (You can also double click on Edit – Properties to select it).
3. Select the Attribute Values tab frame.
4. Enter the name of the window you want this button to display for the Display Button 1 attribute.

For example, if you want the first button to display the Picture window, enter F4 Enter Picture. If the window is the parent window then the <Parent> special connection value can be specified.

5. Repeat step 4 for the attributes Display Button 2 .. 4. If you do not want a button to appear on the window, enter the value <Null>.

For example, if you only want three buttons to be displayed, enter <Null> as the value for Display Button 4.

Step 4 – Identifying Windows or Blocks to Display

For most task flow forms, you must display the first block of the form on entry. However, when you use the Combined People and Assignment form in a task flow, you must specify whether to display the People window (or block) or the Assignment window on entry.

► **To identify windows or blocks to display:**

1. Display the process in the Oracle Workflow Process Diagrammer,
2. Select the window activity by choosing Edit – Properties. (You can also double click on Edit – Properties to select it).
3. Select the Attribute Values tab frame
4. Enter the name of the block you want to display on entry for the Block Name attribute.

Step 5 – Identifying Customized Forms to Include in the Task Flow

If you have created a customized version of a window, you can use the customized version of the form in the task flow.

- ▶ **To identify customized forms to Include in the Task Flow:**
 1. Display the process in the Oracle Workflow Process Diagrammer.
 2. Select the window activity by choosing Edit – Properties. (You can also double click on Edit – Properties to select it).
 3. Select the Attribute Values tab frame
 4. Enter the name of your Form Customization for the Customization attribute.

Step 6 – Verifying the Workflow

When you have completed the task flow definition within Oracle Workflow, use the Workflow Verify function to check that your workflow conforms to Oracle Workflow modeling rules.

- ▶ **To verify the Workflow:**
 1. Choose File – Verify.

Note: This process does not check that you have created a valid task flow. This check is done when you generate the task flow.

Step 7 – Saving the Workflow

When the Workflow has been successfully verified, save it to the HRMS database.

- ▶ **To save the Workflow:**
 1. Choose File – Save.

Step 8 – Generating a Task Flow From Oracle Workflow

After modelling a task flow in Oracle Workflow and saving it to the database, you must generate task flow definitions.

► **To generate a task flow from Oracle Workflow:**

1. From the HRMS application, select the Define Task Flow form.
2. Query the task flow(s) you have created and choose the Convert button.
3. Choose OK to convert the task flows from Oracle Workflow.

Oracle HRMS indicates how many task flows have been successfully converted. If any task flows have not been converted, these are identified and are not saved to the database. You must correct the errors then verify, save and regenerate the task flows again.

Note: Having modelled a task flow in Oracle Workflow, you cannot edit it using the Define Task Flow window. You must make any edits using Oracle Workflow, save it and then regenerate the task flow definitions.

Seeded Task Flows

In this release we supply a window (PERWSHRG) that includes both the People and Assignment windows. This enables the Assignment window to open more quickly from the People window. The seeded task flows use this new window, and we recommend that you use this window in place of the People window (PERWSEPI) and Assignment window (PERWSEMA) in any task flows that require both windows.

Tax Calculations



Attention: Enterprises running Oracle Payroll in the US must use VERTEX software for tax calculations.

Vertex Inc. Contact for Vertex's PayrollTax™ Calculation and Quantum™ for Payroll Tax System

United States federal, state and local tax data for use with Oracle Payroll™ is provided by Vertex Inc. Vertex related software is provided by Oracle in Oracle Payroll. Such tax data and software are licensed under a separate license between you and Vertex. Such software is warranted by Vertex, not Oracle.

Note: Oracle Payroll is delivered with sample Vertex tax data. The sample Vertex tax data is not current and is provided for demonstration purposes only.

To initiate delivery of current tax data and monthly updates directly to you from Vertex, either complete the form below and fax it to 610/640-5892, or mail it to

Vertex Corporation
ATTN: Sales Coordinator
1041 Old Cassat Road
Berwyn, PA 19312

Company Name: _____

Your Name: _____

Your Signature: _____

Your Title: _____

Wage Attachments

Wage Attachment Earnings Rules

There is a new Wage Attachment Earning Rules window to enable you to date effectively create and maintain custom rules concerning the calculation of income in any state for the purposes of wage attachments.

There are also two new view-only wage attachment windows:

- Exemption Rules Administration

This window enables you to view legislative data for informational purposes only. This window displays all legislative rules supported by Oracle Payroll concerning wage attachment disposable income exemption calculations.

- Limit Rules Administration

This window enables you to view the currently identified limit rules: minimum and maximum withholding amounts per period and maximum withholding duration. These rules can be affected by different state and wage attachment categories.

Creating Wage Attachment Earnings Rules

Use Wage Attachments Earning Rules to enable you to date effectively create and maintain custom rules concerning the calculation of income in any state for the purposes of wage attachments.

You can define which supplemental earnings should be included as part of disposable income for support or other wage attachments.

To enter wage attachment earnings rules for earnings categories not presently listed in this window though already defined at your location, add the categories to the list using the QuickCode type `US_SUPPLEMENTAL_EARNINGS`. You cannot change the seeded rules.

For each state, two types of information can be defined, Support Disposable Income and Other Wage Attachment Disposable Income.

Note: It is your responsibility to maintain any custom Wage Attachment Earnings Rules you define. Your rules, however, will be protected during any subsequent upgrades.

► **To create a wage attachment earnings rule for an earnings type, or pre-tax deduction:**

1. Set your effective date.
2. Select Supplemental Earnings for the earnings type.



Attention: The earnings types Imputed Earnings or Pre-Tax Deductions are provided for informational purposes only. These views enable you to double-check that the system is not attaching to imputed earnings or pre-tax deduction items.

3. Select the appropriate level such as Federal or State and select the appropriate state from the list of values, if needed.
Note that the applicable categories are displayed.
4. For each earnings category you defined, select the appropriate rule: Support Disposable Income or Other Wage Attachment Disposable Income.



Attention: Oracle Payroll interprets the earnings category as not subject to attachment if a category is left unchecked.

5. Save your changes.

► **To update a wage attachment earnings rule:**

1. Set your effective date.
2. Query the wage attachment earnings rule you want to update.
3. Make changes to the rule as appropriate.
4. Save your changes.

► **To end a user-defined wage attachment earnings rule:**

1. Set your effective date.
2. Query the wage attachment earnings rule you want to end.
3. For each category, uncheck the appropriate rule: Support Disposable Income or Other Wage Attachment Disposable Income.
4. Save your changes.

Viewing Wage Attachment Rules

Wage Attachment Disposable Income Administration enables you to date effectively define and maintain which Supplemental and Imputed

earnings should be included as part of disposable income for support orders or other garnishments.

The Wage Attachment Exemption Rules window enables you to view legislative data for informational purposes only. This window displays all legislative rules supported by Oracle Payroll concerning wage attachment disposable income exemption calculations.

The Wage Attachment Limit Rules window enables you to view the currently identified limit rules: minimum and maximum withholding amounts per period and maximum withholding duration. These rules can be affected by different state and wage attachment categories.

► **To view Wage Attachment Exemption Rules:**

- Navigate to the Exemption Rules in the View section of the Navigator

► **To view Wage Attachment Limit Rules**

- Navigate to the Limit Rules in the View section of the Navigator.

Section C – Documentation Updates

This section describes any corrections to existing documentation. The following updates are described:

- Implementation Steps, Administration: page 2 – 119
- Creating or Changing an Appraisal Template: page 2 – 119
- Setting Up the Cost Allocation Key Flexfield: page 2 – 119
- Defining Element Links – Costing: page 2 – 120
- VETS–100 Reporting: page 2 – 121
- Defining Formula Processing and Result Rules (US): page 2 – 121
- Associating Processing Rules With Elements (UK): page 2 – 122
- Rolling Back Payroll Runs and Other Processes: page 2 – 122
- Setting Up Length of Service Bands: page 2 – 123
- The Employee Assignment: page 2 – 123
- Predefined and User Defined Reports: page 2 – 125
- Writing the EOY Magnetic Report to Tape: page 2 – 127

Implementation Steps, Administration

See: Implementation Steps, Administration, Step 11, *Oracle Human Resources Implementation Guide*.

In the *Implementation Steps, Administration, Step 11*, we identify that you need to run the Grant Permissions to Roles process (ROLEGEN) to grant access to the HRMS tables for the HR User Role. This is incorrect. It now runs automatically as part of the installation process.

You should, however, run the Grant Permissions to Roles process if any subsequent patch release has introduced new tables or objects.

Creating or Changing an Appraisal Template

See: Creating or Changing an Appraisal Template, *Oracle Human Resources User's Guide*.

In the section *Creating or Changing an Appraisal Template*, we identify that you can create your enterprise's appraisal templates, or modify one of the example appraisal templates.

There is one additional field on the Appraisal Template window, called Assessment Template. This enables you to include an assessment template in the Appraisal Template, and perform an assessment as part of your appraisal process.

<i>Assessment Template</i>	Select an assessment template only if you want to include assessments as part of the appraisal. Otherwise, leave this field blank
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Setting Up the Cost Allocation Key Flexfield

See: Setting Up the Cost Allocation Key Flexfield, *Oracle Human Resources User's Guide*.

In the section *Setting Up the Cost Allocation Key Flexfield*, we identify which flexfield segments appear in which windows by *qualifying* each segment with the levels at which it should be displayed. The information should identify that you can enter five levels, and not six. The order of priority is also incorrect.

Table 2 – 2 lists the five levels, and the correct order of processing priority. Notice that the Payroll level now has the highest priority, but that the Element Entry is still the lowest level of priority.

Level	Qualifiers for this Level	Typical Segments Displayed at this Level
Payroll	Payroll	company code, set of books
Element Link	Element, Balancing	GL account codes for costing and balancing
Organization	Organization	cost centers
Assignment	Assignment	project or product codes, or cost centers that do not map onto organizations
Element Entry	Element Entry	project or product codes (for employees who submit timesheets)

Table 2 - 2 Choosing Where To Display Segments

It is still the case that a code entered at a lower level can override a code entered at a higher level. This means that if a segment is populated at element entry level, it overrides all other levels.

Defining Element Links – Costing

See: Defining Element Links – Costing, *Oracle Human Resources User's Guide*.

In the section *Defining Element Links – Costing*, we incorrectly state that if you select the Costable Type of *Fixed Costed*, you are prevented from overriding the account code at element entry level. You can, in fact, override the account code at element entry level. This is because the order of priorities for Fixed Costing is Payroll (highest priority), Element Link and finally Element Entry (lowest priority).

Instead, Step 1, second bullet for the task *to enter costing information for the link* should read as follows:

<i>Costable Type</i>	If you want all entries of the element to be allocated to the same account, select <i>Fixed Costed</i> .
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VETS-100 Reporting (US)

See: VETS-100 Reporting, *Oracle Human Resources User's Guide*.

In the section *VETS-100 Reporting*, we identify the following:

That you build a headquarters hierarchy to use as a parameter for the headquarters report, and multi-establishment hierarchies for the hiring location reports.

Instead, it should read as follows:

That you build a headquarters hierarchy to use as a parameter for the headquarters report, and multi-establishment hierarchies for the hiring location **and consolidated** reports.

Defining Formula Processing and Result Rules (US)

See: Defining Formula Processing and Result Rules, *Oracle Human Resources User's Guide*.

In the section *Defining Formula Processing and Result Rules*, for the Formula Result Rules window, we did not mention that the result type Update Recurring Entry will remove future-dated changes.

Step 4 should say:

<i>Type</i>	If your formula result type is Update Recurring Entry, then any future changes to be introduced beyond the date of the current payroll run will be overwritten when the current payroll run has completed.
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Associating Processing Rules With Elements (UK)

See: Associating Processing Rules with Elements, *Oracle Payroll User's Guide*.

In the section *Associating Processing Rules with Elements*, for the Formula Result Rules window, we did not mention that the result type Update Recurring Entry will remove future-dated changes.

Step 7 should say:

Type If your formula result type is Update Recurring Entry, then any future changes to be introduced beyond the date of the current payroll run will be overwritten when the current payroll run has completed.

Rolling Back Payroll Runs and Other Processes

See: Rolling Back Payroll Runs and Other Processes, *Oracle Payroll User's Guide*.

In the section *Rolling Back Payroll Runs and Other Processes*, we did not previously specify that when you roll back a payroll run, the rollback removes the element end date for recurring elements if the element end date coincides with the end of a pay period. This happens in the following instances:

- when you select **Delete Record** (from the Payroll Processes window or from the Assignment Processes window)
- when you use the Submit Requests Window

Setting Up Length of Service Bands for PTO

See: Setting Up Length of Service Bands, *Oracle Human Resources User's Guide*.

In the section *Setting Up Length of Service Bands*, we omitted information about the Start Rule for plans of the type **Six Months After Hire**.

If you are setting up length of service bands for a PTO plan and the Start Rule for the plan is of the type **Six Months After Hire**, you need to perform an additional step. After you have completed Step 5, query up the element in the Element window and enter the following value in the Length of Service field:

Length of Service Six months.

Then, if another user tries to enter vacation or sick leave before the six month criterion has been reached, they receive a warning message.

The Employee Assignment

See: The Employee Assignment, *Oracle Human Resources User's Guide*.

In the section *The Employee Assignment*, and subsequent Assignment sections, such as *Using Multiple Assignments* and *Entering a New Assignment*, we identify that your enterprise can enter multiple assignments for employees who work in two or more different capacities at once. We now provide additional information about default assignments, multiple assignments and entering additional assignments, ensuring that you get the most out of the Assignments functionality.

Default Assignment

When you hire an employee, Oracle HRMS automatically creates a default assignment for that employee. This is because an employee must have a current assignment at all times. You then record relocations, promotions, transfers and so on as changes to the existing assignment. These changes are datetracked so that you can make future-dated changes in advance and view the history of changes to an assignment.

Using Multiple Assignments

Oracle HRMS separately manages each assignment, together with its associated compensation and benefits. When an employee has more

than one assignment, one assignment is designated as the primary assignment. When you hire an employee (by entering a person as an employee, or by changing the person type to employee), Oracle HRMS automatically creates a primary assignment for that employee. (The Primary box is automatically checked in the Miscellaneous alternative region of the Assignment window).

If you then enter an additional assignment, the Primary box is automatically unchecked for that secondary assignment.

Changing the Primary Assignment

To change a secondary assignment to be the the primary assignment, select the Primary checkbox in the Miscellaneous alternative region.

When you do this, the application automatically changes the previous primary assignment to secondary.

Query back the assignment details to see the changes.

Predefined and User Defined Reports

See: Predefined and User Defined Reports, *Oracle Human Resources User's Guide*.

We previously omitted several predefined and user defined reports from the table of reports in the section *Predefined and User Defined Reports*. We have now added the following reports to the table:

Report Name	Information Provided
Common	
Costing Breakdown (Oracle Payroll)	Lists costing details by date range, payroll, consolidation set, GRE and segment values.
UK	
BACS (Oracle Payroll)	Summarized totals for BACS tape amounts including consolidated totals for multi-day and multi-file formats
US	
Annual Unemployment Insurance (Form 940) Information (Oracle Payroll)	Provides numbers for annual 940 filing.
Audit Report (Oracle Payroll)	Selects person, employee or applicant, assignment, element, recurring or non-recurring status. Show business group, GRE, assignment details, person entering data (responsibility), input date, effective change date, details of person affected. Lists all fields changed, with input date and effective date, old value and new value, responsibility, workstation address.
Earnings Audit (Oracle Payroll)	Report detailing all employees with a particular element being processed in a given pay period.
Employee Deductions Not Taken (Oracle Payroll)	Listing of employees and deductions that my not have been taken due to insufficient net and whether the amount was arrearred or not.
Employee Deductions Taken (Oracle Payroll)	Listing of employees that had each deduction taken during a given payroll run.
Employee Run Results (Oracle Payroll)	User may select various elements for various time frames, assignments of GREs. The report will show the run results for selected information by pay period.
Federal W-2 (magnetic media) (Oracle Payroll)	Creation of Federal W-2 magnetic media and summary totals.
Federal W-2 Forms (Oracle Payroll)	Provides for printing of employee W-2s at an individual level, thus allowing W-2s to be created as employees terminate, or for an entire GRE.

Report Name	Information Provided
Federal 1099-R (magnetic media) (Oracle Payroll)	Creation of Federal 1099-R magnetic media
Federal 1099-R Forms (Oracle Payroll)	Provides for printing of retiree 1099-R at an individual level as well as all employees in a GRE.
GRE Totals (Oracle Payroll)	Reconciliation report to be used to assist in period end processing balancing purposes. This report shows Federal and State level taxable balances and withholdings.
Invalid Address Information (Oracle Payroll)	Lists any address information inconsistencies.
NACHA (magnetic media) (Oracle Payroll)	Provides for creation of employee NACHA information to be submitted.
NACHA Report (Oracle Payroll)	Detail of employee NACHA information.
Negative Balance Report (Oracle Payroll)	Report listing any negative balances found due to user adjustments or conversion issues.
Payment Register (Checks and Direct Deposits) (Oracle Payroll)	Report listing payments made to employees, listing payment method, check number, and amount.
Report of Income and Employment (Form 941) Information (Oracle Payroll)	Provides total figures to do annual 941 reporting.
Series EE Bond Purchase Report (Oracle Payroll)	Compare actual staffing level with budgeted levels over a specific period.
Statement of Earnings with Check attached (Oracle Payroll)	Statement showing employee information, filing status, vacation and sick balances along with Earnings and Deductions (both current and year-to-date).
Statement of Earnings with Direct Deposit Advice attached (Oracle Payroll)	Statement showing employee information, filing status, vacation and sick balances along with Earnings and Deductions (both current and year-to-date).
State Quarterly Wage Listing (magnetic media) (Oracle Payroll)	Creation of magnetic media for state quarterly wage filing, along with a detailed audit report.
State 1099-R (magnetic media) (Oracle Payroll)	Creation of State 1099-R magnetic media.
Tax Summary Listing (Oracle Payroll)	Report giving figures needed for tax remittance filings.

Report Name	Information Provided
Taxable Balance Verification (Oracle Payroll)	Reconciliation report identifying any conversion or adjustment discrepancies, by comparing calculated withholdings against withheld balances in the system.
Third Party Payment Register (Oracle Payroll)	Listing of third parties for which checks were generated with amounts and employees that are being represented by this amount.

Writing the EOY Magnetic Report to Tape

See Writing the EOY Magnetic Report to Tape *Oracle Payroll User's Guide*.

We provided an example sequence to illustrate how a Magnetic Report could be written to tape using UNIX commands. The block sizes have now changed and the revised sequence is as follows:

► To write a magnetic report to tape using UNIX commands:

1. Place the tape in the device.
2. Rewind the tape. Type:

```
mt -f /dev/rst0 rewind
```

– where `/dev/rst0` is the magnetic device with rewind.
3. Write a tape marker. Type:

```
mt -f /dev/rst8 eof
```

– where `/dev/rst8` is the magnetic device without rewind.
4. Write the Magnetic Report file to tape. Type:

```
dd if=<magnetic report file> of=/dev/rst8 ibs=525
obs=5250 cbs=525
```

► To check the result:

1. Rewind the tape. Type:

```
mt -f /dev/rst0 rewind
```
2. Skip past the tape header. Type:

```
mt -f /dev/rst8 fsf 1
```
3. Read the file from tape, renaming the file. Type:

```
dd of=/tmp/<renamed file> if=/dev/rst8 ibs=5250 obs=525
```

4. Check the original file and the renamed file for differences. Type:

```
wc <magnetic report file> /tmp/<renamed file>
```

Section D – Post Install Steps for Release 11.0.1

The QuickCode BUDGET_MEASUREMENT_TYPE has changed from user-defined to extensible and now has seeded values to enable Oracle HRMS to use some or all these values in the future. For example, in formulas and by the forthcoming Oracle Advanced Benefits product.

Seeding New QuickCodes for BUDGET_MEASUREMENT_TYPE in Release 11.0.1

In the 11.0.1 install, the following values are now seeded for BUDGET_MEASUREMENT_TYPE:

Value	Meaning
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

Implications of the New Seeded Values

Your enterprise has probably been using values and meanings for the QuickCode Type BUDGET_MEASUREMENT_TYPE. The Release 11.0.1 install seeds the values and meanings depending on four criteria. These are that your enterprise has:

- Identical QuickCode values to those seeded, but with different meanings: page 2 – 130
- Different QuickCode values to those seeded, but with identical meanings: page 2 – 131
- Identical QuickCode values and meanings to those seeded: page 2 – 132
- Different (or no) QuickCode values and meanings to those seeded: page 2 – 132

We explain the four different scenarios below, and provide solutions to help you resolve any problems with the seeded values or meanings.

Note: Once you have run the Release 11.0.1 install, we suggest you use the QuickCodes window to check your existing and new seeded values and meanings.

Scenario 1 – Identical QuickCode Value(s) But Different Meanings

Your enterprise has used identical QuickCode values to the values now seeded with 11.0.1, but with different meanings. For example, you might have used the value HEAD, but with your own meaning Number of Employees.

In this instance, Oracle HRMS assumes that you used the QuickCode value in the way the new seeded value is intended for use, irrespective of the meaning, so doesn't seed the new QuickCode value or meaning for HEAD and Number of Employees. It does, however seed the other QuickCode values and meanings.

Your Values and Meanings – Before the installation is performed:

Value	Meaning
HEAD	Number of Employees

Your Values and Meanings – After the installation is performed:

Value	Meaning
FTE	Full Time Equivalent
HEAD	Number of Employees
MONEY	Money
PFT	Percent Full Time

Note: If, for example, a seeded formula to calculate head count is provided by Oracle HRMS in the future, the calculation drives off all assignment budget value records tagged with the QuickCode value HEAD, regardless of the use you made of this value in the past.

What You Need to Do

If your meanings are not the same as the seeded meanings, you must change the meaning to the seeded meaning. For example, you must change the meaning for the value HEAD from **Number of Employees** to **Head Count**.

► To change the meaning of the QuickCode value:

To change the meaning of the QuickCode value, do **one** of the following:

Either:

1. Update the meaning of the value HEAD to Head Count using the QuickCodes window.

2. Create a new QuickCode value and meaning for the QuickCode BUDGET_MEASUREMENT_TYPE.

For example, create a QuickCode value NUMEMPS (number of employees).
3. Transfer the current assignment budget values from HEAD to a new value using the script pepstabv.sql. Enter HEAD as the value **from which** you want the assignment budget value to be transferred and enter NUMEMPS as the value **to which** you want the assignment budget value records to be transferred.

See: Running the Script Pepstabv.sql to Transfer Budget Values: page 2 – 133.

Or:

1. Leave the assignment values as they are. Then, any seeded formula to calculate head count drives off the QuickCode value HEAD, using the assignment budget values.

Note: The meaning of the value 'HEAD' remains as 'Number of Employees' although the seeded meaning would have been 'Head Count' had the value not already existed.

Scenario 2 – Different QuickCode Value(s) But Identical Meaning

Your enterprise has used different QuickCode values to the values now seeded with 11.0.1, but with meanings identical to those being seeded. For example, you might have used the value FULL (the seeded value is FTE), with the meaning Full Time Equivalent (which is the seeded value).

In this instance, Oracle HRMS updates the meaning to avoid data integrity problems. However, none of the assignment budget value records that refer to this QuickCode value have been modified, and there are now two QuickCode values for full time equivalent assignment budget values: Full and FTE.

Note: The value changed to have an @ sign at the beginning of the meaning.

Your Values and Meanings – Before the installation is performed:

Value	Meaning
FULL	Full Time Equivalent

Your Values and Meanings – After the installation is performed:

Value	Meaning
FULL	@Full Time Equivalent
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

What You Need to Do

You need to replace the old QuickCode value with the seeded value.

- ▶ **To replace the old QuickCode value with the seeded value:**
 1. Run the script pepstabv.sql to replace the old QuickCode value with the seeded value. Enter FULL as the value **from which** you want the assignment budget value to be transferred and enter FTE as the value **to which** you want the assignment budget value to be transferred.
See: Running the Script pepstabv.sql to Transfer Budget Values: page 2 – 133.
 2. Disable the QuickCode value FULL.

Scenario 3 – Identical QuickCode Value(s) and Meanings

Your enterprise used identical QuickCode values and meanings to those QuickCode values and meanings seeded.

In this instance, Oracle HRMS does not seed the QuickCode values and meanings, and retains your own.

What You Need to Do

You need do nothing.

Note: We assume that your understanding and use of the QuickCode values and meanings is identical to Oracle HRMS's understanding and use.

Scenario 4 – Different QuickCode Value(s) and Meanings

Your enterprise used neither the QuickCode values and meanings to those QuickCode values and meanings seeded.

In this instance, Oracle HRMS retains your own QuickCode values and meanings (for example, EMP and My Head Count), and seeds the new QuickCode values and meanings (HEAD and Head Count).

Your Values and Meanings – Before the installation is performed:

Value	Meaning
EMP	My Head Count

Your Values and Meanings – After the installation is performed:

Value	Meaning
EMP	My Head Count
FTE	Full Time Equivalent
HEAD	Head Count
MONEY	Money
PFT	Percent Full Time

What You Need to Do

You can leave values and meanings as they are, and do nothing. If you do this, users will see two similar QuickCodes and meanings and will not know which one to select. Alternatively, you can replace the QuickCode value EMP with the seeded value of HEAD.

► **To replace the old QuickCode value with the seeded value:**

1. Run the script pepstabv.sql to replace the old QuickCode value with the seeded value. Enter EMP as the value **from which** you want the assignment budget value to be transferred and enter Head as the value **to which** you want the assignment budget value to be transferred.

See: Running the Script pepstabv.sql to Transfer Budget Values:
page 2 – 133.

2. Disable the QuickCode value EMP.

Running the Script pepstabv.sql to Transfer Budget Values in Release 11.0.1

You can run the script pepstabv.sql to transfer budget values from one QuickCode value to another QuickCode value.

If you are running pepstabv.sql, you must run it immediately after Release 11.0.1 has been installed. Otherwise, if a single assignment has assignment budget values of both the old and new types before running the script, data problems may occur.

► **To run the script pepstabv.sql:**

1. Back up your data before before running the script as pepstabv.sql changes the assignment budget values automatically.
2. Run the script pepstabv.sql
(\$PER_TOP/patch/110/sql/pepstabv.sql)

For example, sqlplus <apps a/c username>/<apps a/c password>@<your database name> @pepstabv.sql
3. Enter the old value (the QuickCode value **from which** you want the assignment budget value to be transferred).
4. Enter the new value (the QuickCode value **to which** you want the assignment budget value to be transferred).



Warning: If you have already moved an old value to a new value and you run pepstabv.sql again with a different old value and the same new value, both sets of data refer to the same new value and data problems will occur.

Making Further Checks

You should make the following checks after running pepstabv.sql.

- Check the assignment budget values for different employees to ensure that the description has changed in the expected manner.
- Check the organization budget value defaults, and also check the values available on the Value field within the Flexfields window.
- Check the budgets to ensure the measurement type displayed has been updated.



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