

Using Oracle® HRMS – The Fundamentals (Canada)

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Reader's Comment Form

Using Oracle® HRMS – The Fundamentals (Canada) A77147–01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information we use for revision.

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Thank you for helping us improve our documentation.



Preface

Audience for This Guide

Welcome to Release Release 11*i* of the Using Oracle HRMS – The Fundamentals (Canada) user guide.

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

- The principles and customary practices of your business area.
- Oracle® HRMS

If you have never used Oracle® HRMS, we suggest you attend one or more of the Oracle® HRMS training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle® HRMS.

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

- Chapter 1 describes the major features of Oracle HRMS, the human resource model, and how information is shared in Oracle HRMS. This chapter also introduces the key concept of DateTrack.
- Chapter 2 describes how to use Oracle HRMS to build a model of your enterprise; how to represent all the different components of your organization.
- Chapter 3 discusses how you can use Oracle HRMS to accurately reflect the work and management of people within your enterprise; how you can model jobs, positions, and grades to reflect the cultures and structure within your company.
- Chapter 4 describes how you define payrolls; you can define as many payrolls as needed to meet the pay policies of your enterprise.

- Chapter 5 focuses on representing labor costs with your employees. Using Oracle Payroll, you can automatically accumulate these costs.
- Appendix A is a listing of all the windows in the system and gives the default navigation path to each. Appendix A also provides a listing of all the reports available in Oracle HRMS.

Finding Out What's New

From the HTML help window for Oracle® HRMS, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Oracle® HRMS.
- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle® HRMS.

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

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can

use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

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

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

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

Related User Guides

Oracle® HRMS shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle® HRMS.

If you do not have the hardcopy versions of these guides, you can read them online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD, or by using a Web browser with a URL that your system administrator provides.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle® HRMS (and any other Oracle Applications product).

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

Oracle Alert User Guide

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

Oracle Applications Implementation Wizard User Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards

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

User Guides Related to This Product

Using Oracle HRMS – The Fundamentals

This user guide explains how to setup and use enterprise modeling, organization management, and cost analysis. It also includes information about defining payrolls.

Managing People Using Oracle HRMS

Use this guide to find out about using employee management, recruitment activities, career management, and budgeting.

Running Your Payroll Using Oracle HRMS

This user guide provides information about wage attachments, taxes and social insurance, the payroll run, and other processes.

Managing Compensation and Benefits Using Oracle HRMS

Use this guide to learn about compensation setup, entry and analysis, setting up basic, standard and advanced benefits, salary administration, and absence management and PTO accruals.

Customizing, Reporting and System Administration

This guide provides information about extending and customizing Oracle HRMS, managing security, auditing, information access, and letter generation.

Implementing Oracle HRMS

This user guide explains the setup procedures you need to do in order to successfully implement Oracle HRMS in your enterprise.

Implementing Oracle Self-Service Human Resources (SSHR)

This guide provides information about setting up the self-service human resources management functions for managers and employees. Managers and employees can then use an intranet and Web browser to have easy and intuitive access to personal and career management functionality

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to customize your system. Oracle FastFormula provides a simple way to write formulas using English words and basic mathematical functions. For example, Oracle FastFormula enables you to specify elements in payroll runs or create rules for PTO and accrual plans.

Using Oracle Training Administration (OTA)

This guide provides information about how to set up and use Oracle Training Administration to facilitate your training and certification business.

Using Oracle SSP/SMP

This guide provides information about setting up and using Oracle SSP/SMP to meet your statutory sick pay and statutory maternity pay obligations.

Using Application Data Exchange and Hierarchy Diagrammers

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application. This guide also provides information about using Hierarchy Diagrammers to view hierarchy diagrams for organizations and positions.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11i User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Using Oracle Time Management

This guide provides information about capturing work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle® HRMS implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Installation and System Administration Guides

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications-wide features such as Business Intelligence (BIS), languages and character sets, and self-service applications.

Installing Oracle Applications

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

Upgrading Oracle Applications

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

Using the AD Utilities

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

Oracle Applications Product Update Notes

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

Oracle Applications System Administrator's Guide

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

Oracle HRMS Applications Technical Reference Guide

This reference guide contains database diagrams and a detailed description of database tables, forms, reports, and programs for Oracle HRMS, including Oracle® HRMS and related applications. This information helps you convert data from your existing applications, integrate Oracle® HRMS with non-Oracle applications, and write custom reports for Oracle® HRMS.

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

Oracle Workflow Guide

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

Training and Support

Training

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

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

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle® HRMS working for you. This team includes your Technical Representative, Account Manager, and Oracle’s large staff of consultants and support specialists with expertise in your business

area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants,

enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

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

Your Feedback

Thank you for using Oracle® HRMS and this user guide.

We value your comments and feedback. At the back of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle® HRMS or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

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

CHAPTER

1

Introduction to Oracle HRMS

Oracle HRMS Introduction

Oracle Human Resource Management System (HRMS) enables you to achieve a well managed human resource system, turning HR management into a strategic advantage.

What is Human Resource Management?

Today, the most successful enterprises continuously review and improve their business functions, searching for new ways to streamline processes to make them more effective and to use them to gain competitive advantage. Human Resource Management is responsible for addressing the workforce aspect of this continuous improvement.

How has the role of Human Resource Management changed?

Human resource management was originally an administrative and welfare role within an enterprise. This often included recruitment and record-keeping functions.

This role was primarily *reactive* in nature. Human Resources responded to the needs of both managers and employees, but did not anticipate them.

In the last few decades, human resource management has evolved and assumed a more *proactive* role. From automated processing, to the provision of a new level of strategic value.

Why is Human Resource Management important?

The people within your enterprise produce the goods and provide the services that fuel your enterprise. At the same time, the human cost is often the biggest cost a company incurs. Well managed human resources directly improve your enterprise and contribute to a competitive advantage.

If your enterprise has strategic, value added human resource management you will hire, motivate and retain the most capable workforce. You will have the ability to engage employees and line managers directly in managing their skills and careers to your enterprise's advantage. Furthermore, you will have accurate, up-to-date workforce information for managers and executives.

What applications comprise the Oracle HRMS family suite?

Oracle HRMS consists of the following applications. These are all separate products powerfully integrated into one application family.

- Oracle Human Resources
- Oracle Advanced Benefits
- Oracle Training Administration
- Application Data Exchange
- Oracle Self-Service Human Resources

Oracle Human Resources, Oracle Payroll, Oracle Self-Service Human Resources and Oracle Advanced Benefits are the core products which make up Oracle HRMS. When the term *HRMS* is used, it refers to this integrated set of applications.

Individual user guides provide information on the the other products.

What is Oracle Canadian HRMS?

Oracle Canadian HRMS is a version of Oracle Human Resource Management Systems localized for enterprises doing business in Canada. At present, Oracle Canadian HRMS includes Oracle Human Resource Management. In the future, Canadian HRMS will include other HRMS components such as Oracle Payroll, and Oracle Self-Service Human Resources.

What is Oracle Human Resources?

Oracle Human Resources (HR) is a proactive management solution that helps control costs while developing and supporting an effective workforce. Among the many features of Oracle HR is the ability to:

- Manage the entire recruitment cycle.
- Design organizational models that match current and future business strategies and objectives.
- Perform position management by defining and recording required skills, competencies, experience and qualifications for positions, jobs and organizations.
- Perform career management functions relating to the definition of skills, assessments, suitability matching, graphical ranking and succession planning.
- Administer and maintain benefits plans, coverage levels and contribution allocations.
- Manage salary proposals and approve these by component.
- Use spreadsheets to export compensation and benefit details for comparison with external survey figures.

Oracle Human Resources provides the shortest route to fast, smart human resource management.

What is Oracle Advanced Benefits?

In addition to the basic compensation and benefit functionality included in Oracle Human Resources, Oracle also offers Oracle Advance Benefits. Oracle Advance Benefits enable the setup and administration of a complete benefits offering, a fundamental component of the total compensation provided to employees.

Oracle Advanced Benefits delivers the following key functions:

- Pre and post-enrollment communications.
- Web and interactive voice response (IVR) enrollment for cafeteria and exceptions.
- Default and mass enrollments.
- Enrollment process monitoring.
- Life event management (for example, new hires, transfers, relocations or age changes).
- Web-based what-if eligibility analysis.
- Flexibility spending account claims processing and reporting.

Oracle Advanced Benefits provides a total compensation framework, setting the stage for exciting and new compensation solutions.

Is Oracle HRMS a Multilingual, Global Application?

Yes. Oracle HRMS offers the best of both worlds in the same installation. Oracle provides non-legislative information common across all countries, plus localized information specific to each country

Oracle also enables you to run HRMS in more than one language on a single database. This enables you to enter and report on information using more than one language. For example, your base, or source language, could be French, but you could also install German and English. You would then be able to enter and produce reports in French German and English.

How to Use Your Documentation and Online Help

There are many different activities which make up a successful strategic, value-added human resource management system. The volumes of your Oracle HRMS User's Guide and online help have been designed to mirror these activities so it is quick and easy to use.

All the activities within your enterprise can be grouped into a number of activity cycles. To help you set up and manage your system, each cycle is explained in a different volume of your Oracle HRMS User's Guide. Each activity cycle is also made up of a series of events. For each event in the cycle you can read information which:

- Introduces the business area which is to be discussed.
- Explains Oracle's key concepts and solutions which help you manage HRMS.
- Provide step by step information about how to complete your tasks.
- Highlights any key decisions you need to make.
- Illustrates Oracle HRMS with realistic examples.

Depending on which applications you use in your enterprise and the legislation in which you operate, you may or may not action all the events in the cycle.

Volume 1: Using Oracle HRMS – The Fundamentals

Introduction to Oracle HRMS

Oracle Human Resource Management System (HRMS) enables you to achieve a well managed human resource system, turning HR management into a strategic advantage.

Organization Management

In addition to your enterprise model, you need to represent all the different organizations which make up your enterprise. You can set up and represent:

- All the default information applicable across your enterprise.
- The physical work locations of your employees.
- External organizations of importance to human resource management, such as recruitment agencies, insurance providers and tax authorities.
- Reporting lines and other relationships among these organizations. You represent these relationships by building organization hierarchies.

Enterprise Modeling

Rather than using an artificial model of your enterprise, you can customize Oracle HRMS so it accurately reflects the organization of work and management of people within the enterprise. Using Oracle HRMS you can model the culture, jobs, positions and grades within your enterprise.

Defining a Payroll

One of the most important features of Oracle HRMS is the ability to define payrolls. A payroll is a set of employees whose pay you process with a single frequency, for example, weekly or monthly. You can define as many payrolls as you require to meet the pay policies of your enterprise. You put an employee on a payroll by making an assignment to the payroll.

You can also assign employees to other employee groups: for example, groups to indicate membership of a union or pension scheme.

Cost Analysis

Oracle HRMS enables you to enter the labor costs associated with your employees. You can use the Cost Allocation key flexfield to set up account and cost centers against which you want to collect costs, and the levels you want to record costs. Using Oracle Payroll, you can automatically accumulate these costs.

Volume 2: Managing People Using Oracle HRMS

Employee Management

Oracle HRMS provides you with an easy, efficient and flexible employee management system that enables you to organize employees exactly as you want.

You can hold a wide range of personal information, such as medical details, work schedules and preferred language for correspondence, as well as the basics such as date of birth, employee number and addresses. You can also enter personal contacts, including dependants and beneficiaries and inquire and report on people held on the system.

You also need to record and manage how people work for your enterprise. This information is the substance of a contract an enterprise has with each of its employees. It associates the employee to the enterprise's work structure and compensations and benefits policies.

Recruitment

Oracle HRMS provides comprehensive recruitment, enabling you to integrate all your recruitment processes, from identifying vacancies to hiring new employees.

Using Oracle HRMS, you can set up your recruitment procedures exactly as your enterprise requires. In particular, you have flexible control over the following key areas:

- Recruitment and selection procedures.
- Security of applicant information.
- Handling of bulk applications.
- Generation of standard letters to applicants at different stages of the recruitment process.

Career Management and Succession Planning

Oracle HRMS career and succession management functionality is built upon the principles of performance management and the competence approach.

The highly configurable framework of Oracle HRMS enables you to define all the components of a performance management system to meet the needs of your enterprise. You can define competencies, behavioral descriptions, multiple types of appraisal and competence evaluation, performance ratings and career and succession plans.

Budgeting

An essential activity in the cycle is budgeting your human resources. Using Oracle HRMS you can define non-monetary budgets, such as head count and full-time equivalent, that are based on your works structures.

Volume 3: Managing Compensation and Benefits Using Oracle HRMS

Compensation and Benefits Setup

Using Oracle HRMS, you have all the flexibility you need to model your compensation and benefit packages. You decide exactly what information you want to hold for compensation management and, if you require it, for payroll.

Compensation Entry and Analysis

To record any form of compensation, benefit, or deduction liability for an employee, you make an element entry. At your enterprise, some elements may be defined with standard links so that eligible employees receive an entry automatically. You do not need to do anything to record these forms of compensation for employees.

Total Compensation

Oracle HRMS provides a complete solution for Total Compensation management. Your Oracle Human Resources license includes the

Standard Benefits feature set that enables you to manage your enterprise's benefit offerings.

The Oracle Advanced Benefits license provides the Standard Benefits feature set plus additional functionality enabling you to design flexible benefit programs and to administer benefits based on life events.

Salary Administration

Using the Salary Administration functionality in Oracle HRMS you can manage efficiently the basic remuneration that employees receive.

You can enter salary amounts or wage rates for all new employees that take effect immediately. You can also enter proposals for salary changes and to identify the various components making up the changes.

Once you have proposed salary changes, you can approve and implement the proposed changes quickly and easily.

Absence Management and PTO Accruals

To manage all your employees' absences from work, you can:

- Identify the types of absences your enterprise recognizes.
- Record the reasons, dates and times for projected and actual absences, and maintain records of time taken for each absence type.
- Group related absence types together for reporting and analysis.
- Set up and administer PTO accrual plans, whereby employees can accrue time off for vacation or sick leave as they put in time at work.
- Calculate Sick Pay and Maternity Pay according to statutory legislation.

You can set up an effective absence recording system in Oracle HRMS. Including information about how to enter and obtain information about employee absences and how to set up, maintain and report on plans for accrual of paid time off.

Volume 4: Customizing, Reporting and System Administration in Oracle HRMS

Extending and Customizing Oracle HRMS

You can extend and customize Oracle HRMS so it works exactly how your enterprise does. You can identify whether to customize parts of the system, define additional information or add your own Lookups. Thus, creating a system specifically for your enterprise.

Security

One of the most important task of the system administrator is security. Security is a major concern of all payroll and human resource departments. Oracle HRMS includes a planned system for keeping information secure and preventing unauthorized access. The system enables you to control access to records, windows and functions by matching each employee's access level to his or her work responsibilities.

Audit Trail

AuditTrail provides a flexible approach to tracking the changes to your data. It enables you keep a history of changes to your important data: what changed, who changed it, and when. With AuditTrail, you can easily determine how any data row or element obtained its current value. You can track information on most types of fields, including character, number and date fields.

Information Access

The information held in Oracle HRMS is an extremely valuable resource for your enterprise. You can use the same information in a variety of different ways depending on your business purpose. For example, you can use Oracle HRMS information in support of each of the following business activities:

- Performing a full range of HR functions on a day-to-day basis.
- Reporting on HR activities.
- Performing what-if exercises to determine the viability of different alternatives.
- Analyzing trends to make explicit connections between discrete items of information thereby enabling long-term strategic planning.

Appendix A: Letter Generation

Standard letters enable you to manage your enterprise's recruitment or enrollment activities more easily. Using Oracle Human Resources you can issue standard letters to applicants and students respectively, triggered by changes in assignment or enrollment status. For example, you can set up a standard enrollment confirmation letter that is triggered when a student's enrollment status is set to Placed or you can set up a rejection letter that is triggered when an applicant's assignment status is set to Rejected.

Using Oracle FastFormula

Oracle FastFormula is a tool which helps you customize your system. It provides a simple way to write formulas using English words and basic

mathematical functions. You can use information from your database in formulas without learning the database structure or a programming language.

Implementing Oracle Self-Service Human Resources

SSHR provides self-service human resource management for managers and employees. Using an intranet and a web browser employees and their managers now have easy to use and intuitive access to personal and career management functionality.

Overview

All your Oracle HRMS applications use the Oracle database as their single source of information. This eliminates data redundancy, reduces the possibility of conflicting data in different databases and creates a consistent, complete and reliable picture of every employee.

To help you understand how Oracle HRMS uses the Oracle database, the following key concepts exist:

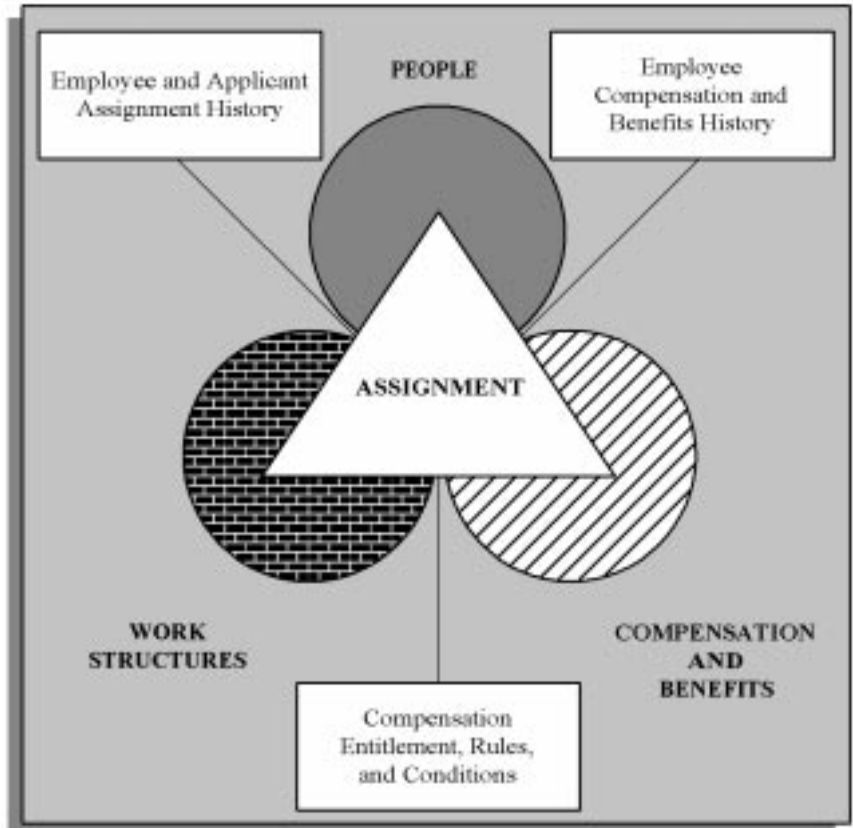
- **Human Resource Model:** You can define your own human resource model to reflect your enterprise's structures and policies. This information model lets you record the personal, work, and pay information for all the people you want to hold and process.
- **How To Use Your Documentation and Online Help:** There are many different activities which make up a successful strategic, value-added human resource management system. All these activities can be grouped into an interrelated cycle of events. To help you set up and manage your system, each event in the cycle is explained in the volumes of your Oracle HRMS User's Guide and the online help.
- **Oracle Self Service Human Resources (SSHR):** SSHR provides self-service human resource management for managers and employees. Using an intranet and a web browser employees and their managers now have easy to use and intuitive access to personal and career management functionality. SSHR is an powerful application you can use in conjunction with Oracle Human Resources.
- **Multilingual Oracle HRMS:** Oracle HRMS enables you to manage information in a wide variety of languages. To enable you to do this Oracle HRMS provides you with:
 - Multiple address styles.
 - Unique national identifiers.
 - Legislation specific date formatting.
 - Translatable information.
 - Multilingual reports.
- **Managing Change Over Time:** A key requirement for any enterprise is the ability to manage change confidently and effectively. Typical enterprise changes include corporate restructuring, departmental reorganization, mergers and de-mergers of companies, centralization or decentralization of

control and decision making, employee development and turnover. In Oracle HRMS, you can change each of the major parts of your enterprise model without having to redefine the other parts.

Human Resource Model

The human resource model is both flexible and adaptable. It is flexible, so that you can reflect the needs of different companies, or different groups within the same company. It is adaptable, so that you can easily change the basic model as your enterprise changes.

Figure 1 - 1
Modelling Human Resource
Information



People

In Oracle HRMS, you can hold information about current and former employees, applicants, external contacts such as contractors, and employee contacts such as relatives and dependents.

In addition to standard information such as addresses, nationality, interview records, qualifications, and absence information, you can define any other special information you need to hold for people. For example, you can define what information to hold on medical history, previous employment, or outside interests.

You can also record employment information. Employee assignments relate employees to the work structure of the enterprise.

Work Structures

Work structures represent the different ways in which employees can work within your enterprise. They provide the framework for defining the work assignments of your employees. They enable you to manage the information about your enterprise that is independent of your employees. You can also think of work structures as representing the organizational units of your enterprise. The Business Group is the largest unit and represents your enterprise as a whole.

The work structures include your internal organizations (such as departments or divisions), payrolls, jobs or positions, grading structures, and any special employee groupings that you use in your enterprise.

Compensation and Benefits

In Oracle HRMS you can define your own types of compensation and benefits, and the business rules you want to apply to them. As you change policies, move people within your enterprise, and adjust their individual remuneration packages, the system maintains their compensation and benefit history.

For example, suppose you want to define a special type of payment and make this available only to employees who work at a particular location. In Oracle HRMS you use a compensation *element* to represent the payment. You define the business rule as a *link* between the element and the specific location. Then when you assign employees to the location, they automatically become eligible for the payment.

Assignments

In Oracle HRMS, the assignment describes employees' places within the enterprise: the organization for which they work, their role, grade, location, and so on. As you change the assignment information for an employee, you automatically build up his or her work history.

Your compensation eligibility rules link compensation and benefits to work structures, such as jobs or grades. The assignment places employees within the work structures of the enterprise. In this way, an employee's assignment determines his or her eligibility for compensation and benefits.

You can use assignments to identify major employee groups within the enterprise for management, for reporting and costing, and for compensation and benefit planning and administration.

Multilingual Oracle HRMS

Oracle HRMS enables you to manage information in a wide variety of languages. To help you enter and retrieve information in the language of your choice, HRMS provides you with the following features.

Multiple Addresses Styles

Every country has its own address style, for example in Italy you can enter the province and in Malaysia you can enter the region. Oracle HRMS enables you to select the correct country address style.

See: Address Styles, *Customizing, Reporting and System Administration in Oracle HRMS*.

National Identifiers

Each country has its own method of identifying its citizens. For example, in the UK it is the National Insurance number and in the US it is the Social Security number.

For supported localizations you can select the correct national identifier for your site and then check on entry that identifiers have the correct national format. If your localization is not supported, you can define your own validation. For example, in the UK the format is 'AADDDDDDA', where A is a letter and D is a digit. A real world example is TN123456M.

Dates and Numbers

Oracle HRMS enables you to enter dates and numbers in any format and then translates this into the national format supported by your legislation. For example, you do not have to enter a date in a prescribed format such as DD/MM/YYYY. You can enter the date how you want, and HRMS automatically configures it in the national format defined for your site.

Similarly, you do not have to enter numerical information in a prescribed format. For example, US usage has previously required the format 1,000.0 whereas German usage has required the format 1.000,00. You can now enter the number without explicit formatting, as the correct format for your site will be automatically configured.

Translating Information

Oracle HRMS enables you to install additional languages on top of your base or source language. You can then enter information in key fields in your additional languages using the Translations window. This is accessed from the Translation icon. The translated information you enter is then used if you print reports or log on to Oracle HRMS in this language.

The HRMS windows where the Translation icon is available are:

- Organization
- Location
- Person Types
- Assignment Statuses
- Element
- Input Values
- Balance
- Organizational Payment Method
- Element Classifications

See: Creating Translations for a Record, *Oracle Applications User's Guide*

Multilingual Reports

Oracle HRMS enables you to print HRMS reports in the languages of your choice. Depending on the type of report, Oracle HRMS either:

- Enables you to select the language in which to print the report
- Prints the report in the language, or set of languages, depending on the report parameters you select

See: Multilingual Reporting, *Customizing, Reporting and System Administration in Oracle HRMS*

Managing Change Over Time

A key requirement for any enterprise is the ability to manage change confidently and effectively. Typical enterprise changes include corporate restructuring, departmental reorganization, mergers and de-mergers of companies, centralization or decentralization of control and decision making, employee development and turnover.

In Oracle HRMS, you can change each of the major parts of your enterprise model without having to redefine the other parts.

To manage the changes to your enterprise, information within your enterprise is either *dated* or *datetracked*.

Dated Information

Work structures are an example of information that is dated. You can attach dates to your work structures to manage different versions over time. You retain previous versions for historical information and you can create future-dated versions to prepare for reorganization in advance.

You can also set up in advance the business rules, including compensation and benefits, associated with the new structures. These become effective on the date you specify, avoiding a workload peak.

The information in Oracle HRMS about your locations, organizations, jobs, positions, grades, payrolls and other work structures is also dated information. All dated information has *From* and *To* dates, that is, dates from and to which it is in effect in your enterprise. For example, when defining a position, you enter a date from which it starts. To close it down, you give it a date to which it remains valid.

Oracle HRMS does not permit you to assign employees to structures on dates earlier than their Date From, or later than their Date To.

Similarly, the system protects you from building eligibility rules for compensation and benefits based on work structures that have not yet gone into effect, or are out of date.

Consider using a fixed date, such as 01-JAN-1901 as the start date for all your initial work structures. By choosing a date like this you can immediately identify all of your implementation definitions. You should use accurate dates for all subsequent definitions.

Dated Versions of Hierarchies

You can structure the organizations and positions you enter in Oracle HRMS into organization or position *hierarchies* that serve various purposes. Reporting hierarchies, for example, reflect reporting lines within your enterprise.

You maintain both dates and version numbers for these hierarchies, to keep a history of your hierarchies as they change over time.

To build a new version of a hierarchy, you can copy an existing one and make the necessary changes to it. When you save the new version the system automatically gives the previous version an end date.

DateTrack

In contrast to work structures, which are simply dated, other key dynamic information in Oracle HRMS is *datetracked*. This includes information on employees, assignments, and compensation and benefits. DateTrack allows you to maintain a continuous history of the information over time.

You can enter datetracked information or make changes to it at any time. When you set an effective date for your work, DateTrack ensures that only information effective *on that day* is used for any processing, validation, and reporting you carry out. When you make a change, you can choose whether it is a correction to the last update or a new update to be recorded in the history of the record. You can use DateTrack History to view a report of every update ever made to a record.

You can identify windows containing datetracked, rather than dated, information by the presence of a region labelled Effective Dates.

Effective Date Reminder

When you are new to DateTrack, you may find it useful to be reminded of your effective date whenever you open a window that contains datetracked information. The reminder appears in a Decision window and asks whether you want to change your effective date. If you choose Yes, the Alter Effective Date window displays.

There is a user profile option called DateTrack:Reminder that determines when the Decision window appears. There are three possible values for this profile option:

- Always
- Never
- Not Today

The Not Today value causes the reminder to appear when you navigate to a datetracked window and your effective date is not today's date.

You can set the value of this profile option in the Personal Profile Values window.

Datetracked Information and History

Oracle HRMS maintains a continuous record of changes made to datetracked information. When you view a record in a datetracked

window, it shows you a snapshot of the information on your effective date. The Effective Dates region on the datetracked window shows you the dates between which the snapshot is valid.

Suppose you are viewing an assignment with an effective start date of 01-JAN-1999 and no effective end date. This means that the assignment was created or last changed on 1 January 1999, and the snapshot information you are viewing is still valid. There have been no changes to the assignment since 1 January 1999, and there are no future dated changes.

To find out whether the assignment existed before 1 January 1999, you should use DateTrack History.

If there is an effective end date, you know that the record was either deleted or changed on the next day. To find out whether the record continues to exist, you can set your effective date to the day after this end date, or use DateTrack History.

When you update datetracked information, you are prompted to choose between Update and Correction.

If you choose Update, Oracle HRMS changes the record as from your effective date, but preserves the previous information. If you choose Correction, Oracle HRMS overrides the previous information with your new changes. The start and end dates of the snapshot you have corrected remain the same.

Example of Correction Versus Update

Suppose you hire two new employees, Jack Lee and Julie Summers. A few weeks later Julie gets married. At the same time you discover an error in Jack's record relating to his nationality.

You *update* Julie's information by setting your effective date to the date of her wedding and entering her new married status, her change of name, and new next of kin information. Her previous personal information, which was valid until her wedding, remains in her record.

You *correct* Jack's wrong nationality by setting your effective date to his hire date and entering the correct nationality. By choosing Correction, you put the record right, from the beginning. You should check whether there is an end date in the Effective Dates region of Jack's record. If there is, you have only corrected the first snapshot of the record. Set your effective date to the day after the end date, and make the correction again. Continue in this way until the To field is blank, indicating that you have reached the last snapshot of this record.

New Records

You cannot create a record and then update it on the same day. If you try to do this, Oracle HRMS warns you that the old record will be

overridden, and then changes Update to Correction. This is because DateTrack maintains records for a minimum of a day at a time.

Future Updates

Using DateTrack, you can make future updates. For example, suppose you are relocating an employee, with six months notice. You decide to enter the relocation on the system straight away. So you set your effective date to the first day when the employee will be at the new location, and change the location on the assignment.

Later that month you promote the employee to a new grade. So you set your effective date to today's date and change the grade on the assignment. Oracle HRMS checks to see whether the record has a future update scheduled. It finds that the location changes in the future and prompts you for the type of update you now want to make. You have two choices:

Insert: This simply inserts the change before the next scheduled change. This is the correct choice for the example. The employee would be promoted from today. The future-dated relocation still takes place in six months time.

Replace: This change replaces all future-dated changes. In the example, the employee would be promoted from today. However, the record of the relocation would be completely removed from the system.

DateTrack Date Security

There is a **DateTrack:Date Security** user profile option, which determines whether you can change your effective date. Your system administrator sets this profile option. You can check its value on the Personal Profile Values window. There are four possible values:

- *All:* You can change to any other effective date.
- *Future:* You can change between today's date and any future dates.
- *Past:* You can change between today's date and any past dates.
- *Present:* You cannot change to a date other than today.

DateTrack Deleting Options

When you delete datetracked information, Oracle HRMS prompts you with the following options:

End Date: This ends the record on your effective date. When you re-query the record, this end date displays in the To field.

Purge: This totally removes the record from your database.

If there are any future updates to the record after your effective date, Oracle HRMS may prompt you with another two options:

All: This removes all future updates to the record. The current snapshot is valid until you make another change.

Next: This removes the next future update to the record. It then resets the current snapshot's end date to the end date of the deleted update.

You do not always see all of these options when you choose to delete. Some windows do not allow all four operations.

Setting Your Effective Date

When you log on to Oracle HRMS, your effective date is always today's date. To view information current at another date, or to make retrospective or future-dated changes, you need to change your effective date.

► **To set your effective date:**

1. Save any outstanding information you have entered or changed, then choose Alter Effective Date from the Tools menu.

The Alter Effective Date window opens.

2. Enter a new effective date and choose OK.

If your current window is a "top-level" window (one called directly from the Navigator), your new effective date remains in place until you reset it or exit Oracle HRMS. If your current window is not a top-level window, your new effective date only applies while you are working in the current window and any windows subsidiary to it. When you return to a top-level window, your effective date is reset to its previous value.

Note: In certain special cases, when you change your effective date on a subsidiary window, Oracle HRMS returns you to the previous window, and you may have to re-query the records you want to view or update. This protects the integrity of these records.

So long as your effective date remains different from today's date, it is displayed in the title bar of every window.

Removing an End Date

If you have mistakenly set an end date on a datetracked record, you can remove it.

► **To remove an end date:**

1. Set your effective date to the day the record ends.
2. Choose Delete Record from the Edit menu.
3. Choose the DateTrack delete option Next. This removes the next change to the record, which is the end date. Save your work.

Viewing the History of Datetracked Information

To see all the changes made to a datetracked record over time, use DateTrack History.

► **To view DateTrack History:**

1. Choose the DateTrack History icon from the Toolbar.

The DateTrack History Change Field Summary window opens. Each row shows which fields were changed on the From date.

2. Choose the Full History button if you want to open a DateTrack History folder showing the value of each field between the effective dates. The row for the current snapshot (corresponding to your effective date) is highlighted.

You can use the Folder menu to select the fields to view in the folder.

Note: It is possible to customize the information displayed in the Folder by modifying the DateTrack History view for the underlying table.

See: How To Create and Modify DateTrack History Views, *(Oracle HRMS Implementation Guide)*

See: Customizing the Presentation of Data in a Folder, *(Oracle Applications User's Guide)*

CHAPTER

2

Organization Management

Organization Management

Oracle HRMS can represent all the components of your enterprise. You can record the physical locations where your employees work and all the different departments and sections that make up your enterprise. You can even record information about other organizations you work with, such as recruitment agencies or tax authorities.

How do you represent your enterprise as an employer?

Oracle HRMS enables you to represent your enterprise as an employer by setting up a Business Group. This corresponds to a company or corporation, or in large enterprises, to a holding or parent company or corporation.

In North America, how do you manage government reporting?

Oracle HRMS enables you to set up one or more Government Reporting Entities (GREs) within each of your Business Groups. GREs represent an employer the government recognizes as being responsible for paying employees and for filing a variety of reports that government agencies require. If your enterprise has a single Employer Identification Number from the Internal Revenue Service, your Business Group and GRE are the same organization.

How do you represent the structure of an enterprise?

Oracle HRMS enables you to build a model of your enterprise showing all the reporting lines and other hierarchical relationships. You can set up reporting hierarchies reflecting all the reporting lines in your enterprise, as established in organization charts.

Organization Management Overview

You can represent your enterprise at the highest level by defining it as an employer, and then representing all the departments and sections below this.

To enable you to get the most out of the Organization Management functionality, you need to understand the components provided to represent your enterprise. These are:

- **Locations:** You can set up the physical locations of your employees.
- **Representing employers using Business Groups:** You need to represent your enterprise as an employer. HRMS enables you to do this by creating Business Groups. This is the largest organizational unit you set up. You can set up:
 - **Single or multiple Business Groups:** You can set up one business group or many Business Groups, depending on the needs of your enterprise.
 - **Defaults for Business Groups:** To save you time, you can enter defaults for the Business Groups. This defines the type of information that will generally apply to all employees in the Business Group, such as, default working hours for all employees. These can be overridden.
 - **Government Reporting Entities** (if you are in North America): You can set up one or more Government Reporting Agencies (GREs) within each Business Group. The GRE is the organization the federal, state, local or provincial governments recognize as the employer.
- **Representing organizations:** HRMS enables you to represent all levels of your enterprise and those enterprises you work with. You can represent:
 - **Internal organizations:** These are the groupings in which employees work, such as branches, departments or sections.
 - **External organizations:** You can also include information about the external organizations you work with, such as, training vendors, tax offices, or certification bodies.
- **Organization hierarchies:** You can show reporting lines and other hierarchical relationships among organizations in your enterprise. You can use:
 - **Multiple hierarchies:** You can set up as many hierarchies as you need, you might want to set up hierarchies for matrix

management, security hierarchies or hierarchies for reporting.

- **Organization change and version control:** Changing your hierarchy to reflect simple changes in reporting lines is not difficult.

Representing Employers using Business Groups

The largest organizational unit you set up in Oracle HRMS to represent your enterprise as an employer is the *Business Group*. A Business Group may correspond to a company or corporation, or in large enterprises, to a holding or parent company or corporation.

By default, all employees you enter in Oracle HRMS receive an assignment to their Business Group. When you give them assignments to internal organizations such as divisions or departments, these replace the default assignment, but their records continue to exist within the Business Group.

Key flexfields enable you to enter information about the Business Group. As part of the implementation of Oracle HRMS, the key flexfields for a Business Group are set up before the Business Group itself. For further details about implementation, refer to the Oracle HRMS Implementation Guide.

Within a Business Group, you set up one or more *Government Reporting Entities (GREs)*. A GRE represents an employer the federal government recognizes as being responsible for paying employees and for filing a variety of reports government agencies require. It is distinguished by having a unique identification number.

A Business Group with companies or divisions that have their own identification numbers includes a GRE for each one. However all these GREs use the body of information on work structures and employees, and the single set of *key flexfields*, established for the entire Business Group.

The Startup Business Group

Oracle HRMS comes with one Business Group supplied as startup data. You can use this and its default definitions as the starting point for your own Business Group, or you can create a completely new Business Group.

Note: If you create a new Business Group, you must create a new responsibility (or edit the default responsibility) to allow access to it, before beginning to create other work structures.

Single and Multiple Business Groups

Many enterprises decide to use a single Business Group to hold 'live' information, so they can display, report and manage information from all parts of the enterprise at the same time.

Note: You cannot view information online for more than one Business Group at a time.

However, there are reasons for setting up multiple Business Groups in the same installation, such as the following:

- You want to have a copy of your live system with example records for training or testing purposes.
- You are a holding company or a corporation with a number of subsidiary companies. Each subsidiary has its own structures, employees, and compensation and benefit policies. If your subsidiaries are in different countries you also have to deal with local legislative requirements.
- You are acquiring a company or merging with another company, and you want to maintain separate structures and compensation and benefits during the transition process.

Representing Organizations

In Oracle HRMS, the organizations you set up to represent your enterprise as an employer are the Business Group, and in North America, one or more GREs within the Business Group.

Below this level, you represent the groupings in which employees work, such as branches, departments or sections, by means of *internal organizations*. To enable the assignment of employees to an internal organization, you classify it as an HR Organization.

You also maintain information in the system about various types of *external organizations* relevant to human resources and payroll management and administration. These can include training vendors, tax offices, benefits carriers, or certification bodies.

External organizations can appear in your organization hierarchies together with *internal organizations* and are defined in the same way.

Note: You can never assign employees to external organizations, even those classified as HR Organizations.

Organization Types

When setting up an organization you can give it an organization type to identify the kind of unit it is, and the part it plays in your enterprise. Examples of organization types can be Administration or Service, or the level of each organization in your enterprise, such as Division, Department or Cost Center.

You can use organization types to report on the different sorts of organizations you set up. You create the organization types you require by entering values for the Lookup Type ORG_TYPE.

You can use organization types to report on the different sorts of organizations you set up.

Organization Classification

Whenever you create an organization you have to give it a classification, such as Business Group or HR Organization. The classification you give to an organization defines its purpose and functionality within Oracle HRMS.

Selecting a classification, enables you to set up additional information about your organization. The classification you enter controls the additional information you can set up.

Classification are predefined, and each Oracle Product group is installed with the classifications and information types relevant to their

application. For example, Oracle Financials has different classifications from Oracle HRMS.

Note: Oracle HRMS enables you to install your own additional information types for classifications.

Classifications and Additional Information Types

The predefined HRMS classifications and information types are as follows. If you have installed other Oracle applications, you may see other classifications and information types.

Classification	Information Type
Business Group	
	Budget Value Defaults
	Business Group Information
	Work Day Information
HR Organization	
	Costing Information
	Parent Organization
	Work Day Information
Bargaining Unit	
Employer	

Maintaining Information for a GRE

Specific tax information must be maintained for your organization. This information includes Business Numbers as well as Tax Groups, NAIC codes, and Tax Calculation Methods. This information is stored for each GRE in your organization.

Levels of Internal Organizations

You decide for yourself the level of organization detail your enterprise needs in Oracle HRMS.

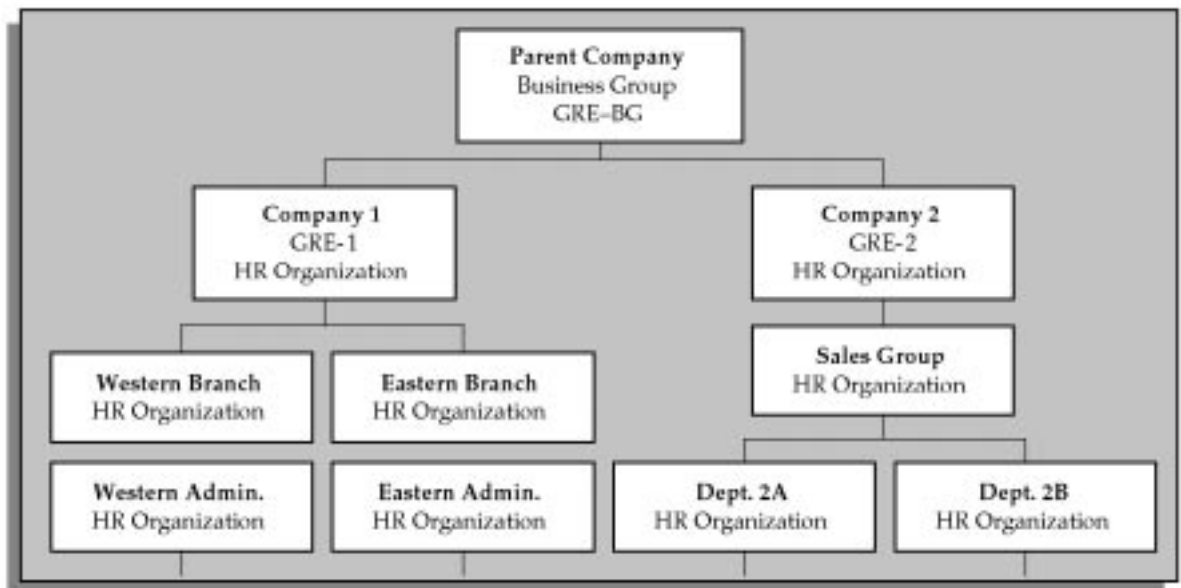
At one extreme, a Business Group/GRE can be the only organization defined in the system. However this will severely limit your ability to manage and report on employee assignment and payroll information, and to control access to HRMS records. At the other extreme, you can define an organization for every grouping of employees, however small. But the costs of maintaining organizations at this level will probably outweigh the benefits.

When thinking about the internal organizations to set up for your enterprise in Oracle HRMS, consider what your current managerial groupings are. Then you can adjust up or down to determine the best level or organizational detail for your enterprise to maintain.

Representing Companies in Multi-Company Business Groups

When the configuration of your enterprise warrants, you can use both internal organizations and the People Group key flexfield to represent the entities appearing on your organization chart. For example, suppose your enterprise includes two companies, each with its own internal groupings and compensation and benefits policies:

Figure 2 – 1A Multi-Company Enterprise



When you set up both the companies and the subordinate organizations within each company as entities to which you can assign employees, you can create rules governing eligibility for compensation and benefits using both the companies and their subordinate organizations.

To represent the branches, administrative and sales groups, and departments within the companies in Oracle HRMS, you can define internal organizations. To represent the companies, you can use the People Group key flexfield, defining a segment of this flexfield as Company, and listing your companies in it:

People Group Key Flexfield

Segment 1: Company

Company 1

Company 2

This setup permits you to assign each employee both to a company and a subordinate organization within the company. You can thereby control his or her eligibility for elements of compensation and benefits both by company, and by organization within the company.

Internal Organizations and Cost Centers

Depending on the structure of your enterprise and your decisions about which organizations to represent in Oracle HRMS, there may not be a one-to-one correspondence between your cost centers and the organizations you enter.

When defining an internal organization, you can identify one cost center against which the payroll costs of the employees assigned to the organization should be collected. You simply select the cost center from a list in a segment of the Cost Allocation key flexfield.

For example, suppose you are defining in Oracle HRMS the organization Product Assembly, whose employee payroll costs go to the cost center Production. When entering the organization Product Assembly, you select Production from the list of cost centers in the Cost Allocation flexfield:

Cost Allocation Key Flexfield

Segment 1: Cost Center

410–Accounting

425–Production

503–Public Relations

Note: If employees' costs are charged to cost centers other than those of their organizations, or if they work in an

organization only part time, you can enter other cost centers, and the percentage of time to be charged to each, on their *employee assignments*. Costing information entered for employee assignments overrides that entered for organizations.

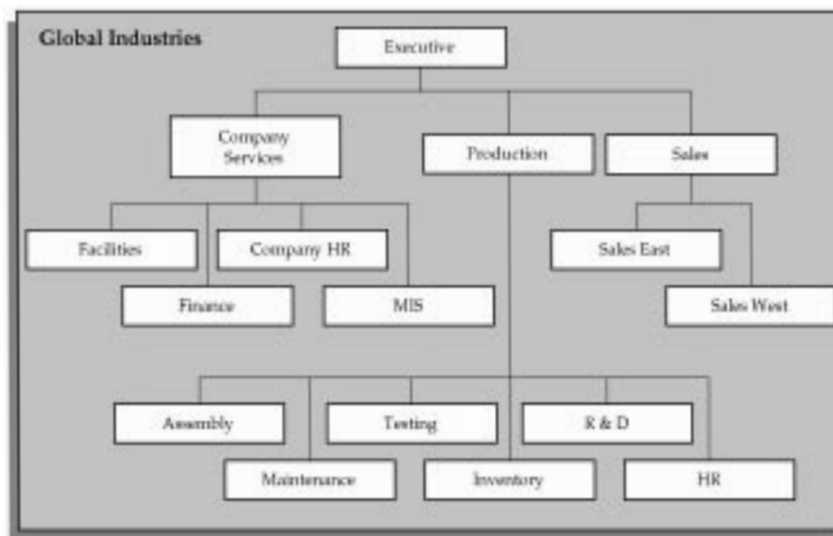
For more information about the cost allocation key flexfield see Setting Up The Cost Allocation Key Flexfield: page 5 – 7.

Organization Hierarchies

In Oracle HRMS, organization hierarchies show reporting lines and other hierarchical relationships among the organizations in your enterprise.

You set up a *primary reporting hierarchy* reflecting the main reporting lines in your enterprise, as established in the organization chart of your enterprise. Below is an example of an organization chart showing the reporting lines of a single-company enterprise.

Figure 2 – 2 Chart Showing Primary Reporting Lines



Multiple Hierarchies

In addition to the primary reporting hierarchy, you can set up in Oracle HRMS as many other organization hierarchies as you need.

Hierarchies for Matrix Management

Your enterprise may have a matrix management structure in which organizations have more than one reporting line. For example, looking at the organization chart for Global Industries, the HR organization under Production may have another reporting relationship to the organization Company HR. You can set up additional hierarchies to reflect secondary reporting relationships within your enterprise.

Security Hierarchies

As well as constructing hierarchies to reflect reporting lines, in Oracle HRMS you can also use hierarchies to control access to information.

For example, in a decentralized enterprise you may want to give each regional manager access to the records of the employees in the organizations in his or her region.

Looking again at the organization chart for Global Industries, you want managers in the Sales East office to have access to the records of all employees in the eastern region sales groups. You can do this by building a geographical hierarchy of your regions and the organizations in each.

Hierarchies for Reporting

When you run some of the Oracle HRMS standard reports, you can specify an organization hierarchy to determine which organizations and employees the report covers. You can also use this approach in your own standard or ad hoc reports. You can create additional organization hierarchies just for analysis and inquiry purposes.

In the US, to produce reporting for government authorities, for example EEO-1 and VETS-100 reports, you build special *establishment hierarchies* to obtain the correct coverage of employees.

Organizational Change and Version Control

Changing your hierarchies to reflect simple changes in reporting lines is not difficult. You create a new *version* of your existing hierarchy and modify parts of its structure. The system retains earlier versions of hierarchies for historical information.

However when you experience a major restructuring, it is often best to create new work structures, including new organizations and reporting lines.



Suggestion: You can create future-dated versions of your organization structures and use these to prepare for reorganization in advance. You retain previous versions of your hierarchies for historical information.

If you want to read more information about dated information and hierarchy versions, see *Dated Versions of Hierarchies*: page 1 – 17

Setting Up and Creating Organizations

To set up organizations for the first time, complete steps one and two. Once you are up and running, you can create new organizations and manage organizations as and when required.

Step 1: Set Up Organizations

- . Set Up Site Locations: page 2 – 17
- . Adapt or Create a New Business Group: page 2 – 19
- . Business Groups: Entering Budget Valuse Defaults: page 2 – 21
- . Business Groups and HR Organizations: Entering Work Day Defaults: page 2 – 22
- . Entering Business Group Information: page 2 – 23
- . Employment Equity Information: page 2 – 24
- . Provincial Employment Standards: page 2 – 25

Step 2: Create Organizations

- . Create an Organization: page 2 – 26
- . Enter Organization Classifications: page 2 – 28
- . Enter Additional Information: page 2 – 30
- . HR: Organizations: Entering Parent Organizations: page 2 – 33
- . HR Organizations: Entering Costing Information: page 2 – 34
- . GRE's: Employer Identification: page 2 – 35
- . GRE's: Provincial Reporting Information: page 2 – 36

Step 3: Create Organization Hierarchies

You can create organization hierarchies using the:

- Organization Hierarchy Window: page 2 – 37.
 - Change Organization Hierarchies: page 2 – 39
 - Delete Organization Hierarchies: page 2 – 40

Setting Up Locations

You can enter addresses in the Location window.

Locations are shared across Business Groups in HRMS and with two other Oracle applications: Inventory and Purchasing. HRMS does not use some of the fields in the Location window. These fields are disabled for HRMS users.

For information about Purchasing locations, see *Defining Locations, Oracle Purchasing User's Guide*

► **To enter a work location and its address:**

1. Enter the name of the location, and a description if required.
2. Uncheck the Global check box if you want the location to only be available within the default Business Group of your current responsibility. Accept the default if you want the location to be a global location and therefore available to all Business Groups.

If you are setting up a global location, the location name must be unique across all Business Groups.

If you are setting up a location for one Business Group, the location name must be unique within that Business Group and all global locations, but does not have to be unique across all Business Groups.



Attention: You cannot amend the Global check box once you have set up your location.

3. Select a national address style from the list. A window opens with the address format for the selected country.
4. Enter address information in this window and choose OK.



Additional Information: Default address styles are predefined for many countries. You can add address styles for other countries, if required.

Note: If you are a US Payroll customer and you change a location address, you need to update the address in the location field of the State Tax Rules window for each assignment at that location.

5. Choose the Extra Information button to enter any additional information required by your enterprise.

See: *Entering Extra Information, Customizing, Reporting and System Administration in Oracle HRMS*

6. Save your location.

Making Locations Inactive

Making a location inactive prevents users from selecting it.

- ▶ **To remove an address from the Location list:**
 - Enter an inactive date when the location is no longer in use in your enterprise, and save your changes.

Deleting Locations

You can delete locations that have not been used.

Note: If a location is still in use, but you do not want it to be selected today or in the future, enter an inactive date.

- ▶ **To delete a location:**
 1. Query the location you want to delete.
 2. Delete the location.
 3. Save the changes.

Adapting and Creating a New Business Group

The first organization you must set up is the Business Group, to which all other organizations belong.

You can either adapt the startup Business Group provided with Oracle HRMS, or create a new Business Group for your enterprise.

You must then create a responsibility that enables you to access the Business Group.

► **To adapt the startup Business Group:**

1. Select the default Oracle Human Resources responsibility with the security group 'Standard'. This enables you to see all the records for the startup Business Group.
2. Adapt the startup Business Group to your own Business Group requirements.

See: Creating an Organization: page 2 – 26

► **To create a new Business Group:**

1. Create a new Business Group.
See: Creating an Organization: page 2 – 26
2. After you save your Business Group and before you use it, your system administrator must create a new responsibility for it, giving access to all the records in the Business Group, as follows:

► **To define a 'view-all' responsibility:**

1. Navigate to the Responsibilities window.
2. Enter a Name for the responsibility and select the application for which you are defining it (such as Oracle Human Resources) in the Application field.
3. In the Menu field, select F4 HRMS Top Menu.
4. In the Report Group field, select one of the predefined report groups (such as US HRMS Reports and Processes).
5. Save your work.
6. Set the HR User Profile options for the new responsibility using the System Profile Values window. You must set up the:
 - HR: User Type

Use this profile option to limit field access on windows shared between Oracle Human Resources and Oracle Payroll

- HR: Security Profile

Use this to link your new responsibility to the 'view all' security profile. This gives you access to all the records in the Business Group.

See: System Profile Value Window, *Oracle Applications System Administrator's Guide*

7. Save your work.

Business Groups: Entering Budget Value Defaults

You can set up budgets for non-monetary measures such as headcount or full-time equivalent. When you enter employee assignments to define the work an employee does for your enterprise, you can specify the value of the assignment towards these budgets. For example, all assignments typically count as *one* for headcount budgets, but may count as less than one for full-time equivalent budgets.

To remove the requirement to enter these values for every assignment, you can enter defaults for the whole Business Group. You can override the defaults for individual assignments.

► **To define budget value defaults:**

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Budget Value Defaults.
2. Click in a field of the Additional Organization Information window to open the Budget Value Defaults window.
3. In the Units field, select a measurement type, such as Full Time Equivalent or Headcount.
4. Enter a default value in the Value field.

You can enter a default value for as many budgetary units as you plan to use for the Business Group.

To find out more about budgets see Budget Overview, *Managing People Using Oracle HRMS*.

Business Groups and HR Organizations: Entering Work Day Defaults

You can set up default working hours for all employees in the Business Group or in an HR Organization, saving data entry at lower levels. When necessary, you can override the defaults at lower levels, for example, for individual positions or employee assignments.

The Salary Administration process uses working hours information to prorate the salary values against which it validates any salary proposals.

► **To define work day defaults:**

1. In the Organization window, query the Business Group or HR Organization if it does not already appear there. In the Organization Classifications region, select Business Group or HR Organization, choose the Others button, and select Work Day Information.
2. Click in the field of the Additional Organization Information window to open the Work Day Information window.
3. Enter the normal start and end times in 24 hour format. For example, for 5.30 p.m., enter 17:30.
4. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.

You can add to the list of available frequencies by making entries for the Lookup Type FREQUENCY, using the Application Utilities Lookups window.

Entering Business Group Information

► **To enter Business Group information:**

1. In the Organization window, query the Business Group if it does not already appear there. In the Organization Classifications region, select Business Group, choose the Others button, and select Business Group Information.
2. Click in a field of the Additional Organization Information window to open the Business Group Information window.
3. You can enter a short name for the Business Group. This name is no longer used in Oracle HRMS. It is provided for compatibility with earlier releases, where it appeared in the header line of each form.
4. Select the method of creating identifying numbers for employees and applicants. The choices are:
 - Automatic number generation
 - Manual entry
 - Automatic use of the national identifier (for example, the social security number in the US, and the NI number in the UK). This option is available for employees only.



Attention: Once you save your method, you cannot later change to either of the automatic options. You can only change to manual entry.

5. Select the names of the key flexfield structures you want to use in this Business Group.
6. Select the appropriate Legislation Code and default currency. The Legislation Code determines the startup data you can access and the contents of some legislation-specific windows.



Attention: Selecting the correct legislation code is essential for the correct functioning of Oracle HRMS. You cannot change the legislation code after entering employees against the Business Group.

7. (US users) To maintain fiscal year balances in Oracle Payroll if your fiscal year is different from the calendar year, enter the fiscal year start date.
8. You can enter a Minimum and Maximum Working Age for the Business Group. When you enter or hire employees, you receive a warning if the person's age is outside this range.
9. Save your work.

Employment Equity Information

Employment Equity information is maintained in the Employment Equity Information window. This data will be included in the Employment Equity Report.

► **To enter Employment Equity information for a Business Group:**

1. Enter the Chief Executive Officer of the employer in the CEO field.
2. Enter the name of the person responsible for Employment Equity in the Contact Person field.
3. Save your work.

Provincial Employment Standards

Some Provincial Employment Standards information can be stored in the Provincial Employment Standard window.

► **To enter Provincial Employment Standards information for a Business Group:**

1. Select the appropriate province from the List of Values in the Province Abbreviation field.

Provincial Employment Standards information is stored for each province. Changing the Province Abbreviation will display the corresponding information for the selected province.

2. Enter the Minimum Wage, Maximum Hours, and Minimum Call In into the appropriate fields.
3. Save your work.

Creating an Organization

Use the Organization window to create:

- Business Groups
- External organizations (for example, tax offices, insurance carriers or recruitment agencies)
- Internal organizations (for example, departments, sections or cost centers)
- GREs (North America only)
- Retirement organizations (for example, benefits carriers, tax authorities and recruiting agencies)

To create an organization you must:

1. Create an Organization: page 2 – 26
2. Enter Organization Classifications: page 2 – 28
3. Enter Additional Information: page 2 – 30

► **To create an organization:**

1. Navigate to the Organization window and select the New button to create a new organization.

Note: For information about querying existing organizations, see Finding an Organization: page 2 – 41.

2. Enter a name for your organization in the Name field.

Note: All Oracle applications you install share the information entered in the Organization window. Therefore organization names must be unique within a Business Group, and Business Group names must be unique across your applications network.

3. Optionally, select an organization type in the Type field.

Organization types do not classify your organization, you use them for reporting purposes only. The type may identify the function an organization performs, such as Administration or Service, or the level of each organization in your enterprise, such as Division, Department or Cost Center.

4. Enter a start date in the From field. This should be early enough to include any historical information you need to enter.

Note: You cannot assign an employee to an organization before the start date of the organization.

5. Enter a location, if one exists. You can also enter an internal address to add more details such as floor or office number.

Note: If you are using Oracle Payroll in the US, every organization to which employees can have assignments, including Business Groups, must have on record a location with a complete address. This is because the system uses the location of the organization of the employee's primary assignment to determine employee work locations for tax purposes. This does not apply to GREs, because the assignment to a GRE exists in addition to the assignment to an organization.

6. Enter internal or external in the Internal or External field. You cannot assign people to an external organization.

Examples of external organizations that may require entry are benefits carriers, insurance carriers, organizations that employees name as beneficiaries of certain employee benefits, and organizations that are recipients of third party payments from employees' pay.

7. Save the basic organization details.

Entering Organization Classifications

To determine the purpose and use of each organization you create, you give it one or more classifications. The setup information you enter for an organization depends in large part on its classification.



Attention: Classifying an organization as a Business Group is not reversible. Employees, organizations, and other data are partitioned by Business Group. You can only view the records of one Business Group at a time.

Organization Classifications

You can select the following classifications depending on your legislation:

All Legislations

The following classifications can be used by all legislations:

- **Business Group:** Use this to define a Business Group.
- **HR Organization:** Use this for all organizations (including Business Groups and if you are in the US, GREs) to which you want to assign employees.
- **Payee Organization:** Use this when defining an external organization that is the recipient of a third party payment from an employee, for example a court-ordered payment. You can then select this organization on the Personal Payment Method window when entering a third party payment method.
- **Employer or Bargaining Unit:** Use these when defining an organization that is involved in negotiating a collective agreement. You can then select the organization when entering details about a collective agreement.

Selected Legislations

The following classification is used by North America and other selected legislations:

- **GRE/Legal Entity:** Use this to define an organization that is recognized as a separate employers by tax or other legal authorities.

US Legislation

The following classifications can only be used under US legislation:

- **Reporting Establishment, Corporate Headquarters or AAP Organization:** When defining reporting organizations, that is,

organizations required for the production of certain reports for government agencies.

- **Benefits Carrier, Workers Compensation Carrier, or Beneficiary Organization:** When defining an external organization belonging in one of these classifications. You can then select the organization when defining a benefit, entering information for Workers Compensation calculations, or recording beneficiaries employees have named for certain benefits.

► **To enter organization classifications**

1. Enter the classification for your organization in the Name field.
2. Enable the classification by checking the Enable box. This allows you to use and enter the essential additional information for your organization.
3. Save the classification details.
4. You can either enter additional information for the classification type or enter another classification.

Note: Save each classification after entering and enabling it.

Entering Additional Information

For each classification you set up you can enter additional information. This information can be different for each classification.

Note: There is no additional information to enter for a Payee Organization.

► **To enter additional information:**

1. Click on the organization classification for which you want to enter additional information.
 - Select Business Group: page 2 – 30 to enter details about an organization which is classified as a Business Group
 - Select HR Organization: page 2 – 30 to enter additional details about an organization which is classified as an HR Organization.

Click classification and additional information types: page 2 – 9 if you need to check which classification to select.
2. Choose the Others button to open the Additional Organization Information window.

Business Group Additional Information

3. Select one of the following:
 - Business Group Information, see Entering Business Group Information: page 2 – 23
 - Budget Value Defaults, see Business Groups: Entering Budget Value Defaults: page 2 – 21
 - Work Day Information, see Business Groups and HR Organizations: Work Day Defaults: page 2 – 22

Either a window opens in which you can enter your additional details or another Additional Organization Information window opens. If another Additional Organization Information window opens, follow step 4. This window is an example of a *flexfield structure*.

4. Click in the field to open the full window.

HR Organization Additional Information

5. Select one of the following:
 - Costing Information, see HR Organizations: Entering Costing Information: page 2 – 34
 - Parent Organization, see HR Organizations: Entering Parent Organizations: page 2 – 33

- Work Day Information, see Business Groups and HR Organizations: Entering Work Day Defaults:: page 2 – 22

Either a window opens in which you can enter your additional details or another Additional Organization Information window opens. If another Additional Organization Information window opens, follow step 6. This window is an example of a *flexfield structure*.

6. Click in the field to open the full window.

Entering Further Information

7. If multiple fields exist in the Additional Organization Information window you can repeat these steps again.

The Additional Information window displays the information you enter in a condensed format.

8. Save your additional information entry.

HR Organizations: Entering a Work Schedule

Work schedules show the number of working hours scheduled each day of the week for employees, starting with Monday. For example, for an employee who works 7 hours and 45 minutes each day Sunday through Thursday, with Friday and Saturday off, the work schedule is:
775-775-775-775-0-0-775.

Oracle Payroll uses work schedules to prorate pay for employees who do not submit timecards. The startup data you receive with Oracle Payroll includes several work schedules in common use, entered in the table COMPANY WORK SCHEDULES.

► **To select a work schedule for an HR Organization:**

1. In the Organization window, query the organization if it does not already appear there. In the Organization Classifications region, select HR Organization, choose the Others button, and select Work Schedule.
2. Click in the field in the Additional Organization Information window to open the Work Schedule window.
3. Select the default work schedule for the organization.

You can override this default for individual employees on their assignments.

If the work schedule you need is not on the list, go to the Table Structure window, query the table COMPANY WORK SCHEDULES, and enter the new work schedule.

HR Organizations: Entering Parent Organizations

After you set up organization hierarchies, use the Parent Organization window to place a subordinate organization in hierarchies by naming its immediate parent in each hierarchy.

► **To enter a parent organization:**

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organization, choose Others, and select Parent Organization to open the Parent Organization window.
2. Select the hierarchy name.
3. Select the name of the parent organization to which the HR Organization is subordinate in this hierarchy.
4. To enter the HR Organization in another hierarchy, repeat steps 2 and 3.

HR Organizations: Entering Costing Information

► **To enter costing information:**

1. In the Organization window, query the HR Organization if it does not already appear there. In the Organization Classifications region, select HR Organizations, choose Others, and select Costing Information.
2. Click in the Additional Information window to display the segments of the Cost Allocation flexfield set up with the qualifier of Organization.
3. Select the appropriate cost code in each segment.

For individual employees, you can override these organization-level codes by entering costing information on their assignments.

Employer Identification

You enter Employer Information for your organization in the Employer Identification window.

► **To enter Employer Identification information for a GRE:**

1. Enter the Business Number for this GRE. Also, enter the Quebec Business Number, if applicable.
2. Enter the EI rate for the GRE.
3. Enter the name of the Tax Group the GRE belongs to.

Employers with multiple GRE's can place certain GRE's together in Tax Groups. When multiple GRE's are included in a Tax Group, the taxable limits for CPP/QPP and EI are maintained at the Tax Group level.

Using Tax Groups allows employers to give employees moving within GRE's credit towards their CPP/QPP, and EI taxes.

Note: The Tax Group name must be consistent in spelling and case for all GRE's to be included. For example, "My Tax Group" is not the same as "my tax group".

4. Select the Reporting Type from the List of Values.
5. Select the appropriate Federal Tax Calculation Method from the List of Values. Also, select a Quebec Tax Calculation Method if applicable.
6. Enter the NAIC Code for this GRE, or select it from the List of Values.
7. Click OK to save your work.

Provincial Reporting Information (For use with Oracle Payroll)

Provincial reporting information is maintained at the GRE level for each province. You enter this information in the Provincial Reporting Info. window.

Note: The functionality of this window will be available with the release of Oracle Payroll. With a HR only installation, you will not be able to enter the WCB Account Number or Provincial Health Number.

► To enter Provincial Reporting information for a GRE:

1. Select the province that you are entering information for in the Province Abbreviation field.
2. Enter the WCB Account Number for the GRE or select one from the List of Values.
3. Enter the Provincial Health Number for the GRE or select one from the List of Values.
4. Save your work.

Creating Organization Hierarchies

You create organization hierarchies in the Organization Hierarchy window. Always define hierarchies from the top organization down.

You must define the top organization in the hierarchy, and at least one organization subordinate to it.

► **To set up a new organization hierarchy:**

1. Enter a unique name for the hierarchy, and check Primary if it is your main reporting hierarchy.
2. Enter the version number and start date for the hierarchy.
You can copy an existing hierarchy. See: **To copy an existing hierarchy: page 2 – 38**, below.
3. Query the top organization name in the Organization block.
4. In the Subordinates block, select the immediate subordinates for the top organization.
5. To add organizations below one of these immediate subordinates, check the Down check box for the organization.

The Organization block now displays the organization you selected. You can add subordinates to *this* organization. To return to the previous level, check the Up check box.



Attention: The list of organizations from which you can select in the Subordinates block includes organizations that are already in the hierarchy. If you select such an organization, you will move it and all its subordinates within the hierarchy.

See: Changing Organization Hierarchies: page 2 – 39

► **To create a new version of an existing hierarchy:**

1. Query the name of the hierarchy.
2. In the Version field, use the Down Arrow to move through existing versions of the hierarchy until you reach a version number for which no other data appears. Enter the start date for the new version.

Note: Overlapping versions of a hierarchy cannot exist. Whenever you enter a new version of a hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains the records of obsolete hierarchies, so you do not lose any historical information.

You can copy an existing hierarchy. See: **To copy an existing hierarchy: page 2 – 38**, below.

3. Query the top organization name in the Organization block.
4. In the Subordinates block, select the immediate subordinates for the top organization.
5. To add organizations below one of these immediate subordinates, select the Down check box for the organization.

The Organization block now displays the organization you selected. You can add subordinates to *this* organization. To return to the previous level, select the Up check box.

► **To copy an existing hierarchy:**

1. Enter or query the name and number of your new hierarchy version and choose the Copy Hierarchy button.
2. Select the name and version number of the hierarchy you want to copy.

Details of this hierarchy then appear in the Organization and Subordinates blocks. You can change these.

Changing Organization Hierarchies

► **To add a new organization to an existing hierarchy:**

1. Query the hierarchy and version you want to change.
2. Query the parent organization for the one you are adding.
3. Select the new organization in the Subordinates block.



Attention: The list of organizations from which you can select in the Subordinates block includes organizations that are already in the hierarchy. If you select such an organization, you will move it and all its subordinates within the hierarchy.

► **To change the top organization of an existing hierarchy:**

1. Query the hierarchy and version you want to change.
2. Query the new top organization.
3. Select the previous top organization in the Subordinates block.

► **To move an organization and all its subordinates:**

1. Query the hierarchy and version you want to change.
2. Query the new parent organization for the one you want to move.
3. Select the organization to move in the Subordinates block. All the organization's subordinates are moved.

Deleting Organization Hierarchies

You cannot delete an organization hierarchy if other versions exist, or a security profile uses it.

- ▶ **To delete an organization hierarchy**
 1. Remove all the subordinate organizations from the hierarchy, starting at the lowest level.
 2. Delete the organization hierarchy.

Finding an Organization

Use the Find Organization window to find the organizations you want to review or amend. If you want to set up a new organization, rather than querying an existing organization, select the New button. For more information about creating a new organization see Creating an Organization: page 2 – 26.

Note: When you navigate to the Organization window, the Find Organization window automatically displays.

► **To query an organization using the Find Organization window:**

1. Do one, a selection, or all of the following:
 - Enter a full or partial query on the organization's name. If more than one name matches the selection criteria, select one of the names.
 - Enter a full or partial query on the organization type and/or location. If more than one organization type or location matches the selection criteria, select the type and/or location to query.
 - Enter a full or partial query on the classification name. If more than one classification name matches the selection criteria, select the name to query.

For the classification you have selected indicate whether you want to query on:

- **Enabled classifications:** This only returns those organizations that match your selection criteria and have your selected classification enabled.
 - **Disabled classification:** This only returns those organizations that match your selection criteria and have your selected classification disabled.
 - **Both:** This returns organizations that match your selection criteria and have your selected classification, regardless of whether the classification is enabled or disabled.
2. Choose the:
 - **Find** button to run the query.

The organization or organizations found by the query display in the Organization window. If the query finds more than one organization, you can use the [Down Arrow] key or choose Next Record from the Go menu to display the next organization.
 - **Clear** button to remove the existing selection criteria. You can then enter new information on which to perform a query.

Removing and Deleting Organizations

Remove an organization if you want to prevent it being available for employee assignments. This still leaves a history of the organization. Only delete an organization if you want to completely remove it from your system.

► **To remove an organization**

1. Select the organization you want to remove.
2. Enter an end date (Date To) on the organization record.

► **To delete an organization**

1. Remove any employee assignments to the organization.
2. Remove the organization from any hierarchies.
3. Disable its organization classifications in the Organization window.
4. Delete the organization in the Organization window.

Running the Organization Hierarchy Report

Oracle HRMS includes a standard Organization Hierarchy Report to display the relationships between organizations in a hierarchy.

You run reports from the Submit Requests window.

► **To run the Organization Hierarchy Report:**

1. In the Name field, select Organization Hierarchy.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. In the Organization Structure field, select the hierarchy. If there are multiple versions, select a version.

If the effective date lies between the version's start and end dates, the report shows information for the effective date. If it lies outside these dates, the report shows information for the start date of the version.

5. In the Parent Organization field, select the highest organization in the hierarchy that you want to see on the report.
6. Enter Yes in the Managers Shown field to see managers' names.
If there are more than ten managers, you see the number of managers only.
7. Choose the Submit button.

CHAPTER

3

Enterprise Modeling

Enterprise Modeling

Each enterprise has its own unique culture, which is reflected in the organization of work and in the management of people within the enterprise. The enterprise culture also affects the reward systems in operation and the control systems that are required.

The range of enterprise modeling is very wide. However, it is possible to identify some common types of enterprise, and we suggest how you might implement Oracle HRMS for three typical enterprise models. These are:

- Project based enterprises
- Rule based enterprises
- Hybrid enterprise structures

How closely should you follow one or other of these models?

These suggestions are not intended to provide a blueprint for your own implementation. They should help you to see the possibilities – how you can implement and use different combinations of organizations and jobs, or positions in your own situation.

What is the role of jobs, positions and grades in enterprise modeling?

Jobs, positions and grades play a key role in the modeling of work structures in your enterprise. Jobs and positions can represent the roles of your employees in different ways.

You can relate compensation to grades in two ways: *directly*, using grade rates, or *indirectly*, using grade scales. If you relate compensation to grades directly, salary information is held in the salary element. If you relate compensation to indirectly, this salary information is not held in the salary element, but in a grade step table. There may be several steps, and hence values, for each grade in its grade scale. We explain the factors you should take into account in choosing the more appropriate of these two approaches for your enterprise.

What is the role of position hierarchies?

Position hierarchies show the detailed line management reporting in each organization throughout the enterprise. You can set up a primary hierarchy and multiple secondary hierarchies to show reporting lines, including "dotted line" reporting. You can also use position hierarchies to control access to information.

Can I reorganize my Business Group?

Yes. By using Mass Move you can move a group of assignments to different positions either within an organization or between organizations. You can move assignments to existing positions or create new positions for them. You can also change the grade, location, and standard conditions of an assignment.

Enterprise Modeling Overview

In many enterprises the basic management units are roles, not individuals. This is because organizations continue in unchanged existence despite frequent changes in staff. However, the definition of a 'role' varies from one enterprise to another. Like organization structures, it reflects the culture of the enterprise.

Role Definition (Jobs and Positions)

You define roles to represent the ways that different groups of employees work as:

- Jobs
- Positions

You can also have a combination of both to define different roles throughout your enterprise.

You can also identify groups of employees (using the Job Name and Position Name key flexfields), and you can hold standard information, such as job descriptions and standard working hours.

Part of your definition also includes the evaluation you want to perform between roles.

Role definitions can include descriptions of responsibilities, requirements and working conditions. There are a number of ways to add information about a role, for example, you can attach documents (such as word processed documents, spreadsheets, or simple text comments) to each job or position record. You can also add up to twenty additional fields to each window to hold extra information you require. To see the number of ways to add information, see: *Entering Additional Information About Jobs and Positions*: page 3 – 50.

Position Hierarchies

If you use positions to define roles, you can define *position hierarchies* to show the detailed line management reporting in each organization or throughout the enterprise. You can create and maintain your reporting structures in one of two ways; using the Position Hierarchy window or the Position Hierarchy Diagrammer.

Grade Structures

You can represent the grade structures used in your enterprise, and relate compensation to grades. You can relate compensation to grades *directly*, using grade rates, or *indirectly*, using grade scales.

Reorganize Business Groups

You can also represent the reporting lines and other relationships by building hierarchies. Using Mass Move, you can transfer a group of

employee assignments in one step, to another organization or to new positions within the same organization.

Collective Agreements

You can record details of collective agreements that are recognized by organizations within your Business Group. Collective agreements are agreements between a bargaining unit and an employer or employer federation that determine minimum pay rates and conditions for the employees covered by its terms.

Jobs and Positions

You define roles to represent the ways that different groups of employees work. In Oracle HRMS you can use *jobs* or *positions*, or a combination, to define roles.

Job A job is a generic role within a Business Group, which is independent of any single organization. For example, the jobs Manager and Consultant can occur in many organizations.

Position A position is a specific occurrence of one job, fixed within one organization. For example, the position Finance Manager would be an instance of the job of Manager in the Finance organization. The position belongs to the organization. There may be one, many, or no holders of a position at any time.

Example

In a large structured organization, you may have a permanent establishment of positions for most of your employees.

However, you may also have groups of employees hired to perform specific tasks. This can be on a temporary or a permanent basis. Staff in this category can include agency workers, consultants and contractors. For these staff, you can define the role more flexibly as a job.

Model Your Organization and Roles

When you plan how to model your organizations and roles, consider the following points:

- Positions are normally used in role-based enterprise structures where clearly defined rules largely determine the ways employees work, and the compensation and benefits they receive.
- To manage fixed establishments of posts that exist independently of the employee assignment, it is best to use positions.

If you decide to use positions to represent your enterprise structures you need to consider carefully how to use organizations.

Positions provide you with a finer degree of structural definition and control than organizations on their own. You can use both organizations and positions to represent your reporting structures. However, if you define both, you must also maintain both over time. This may lead you into duplication of effort and information.



Suggestion: If you decide to use positions to represent how people work in your enterprise, it is best to define most of the

detail at the level of the position. Do not duplicate this detail in organization structures.

Use organizations to show your highest level of departments or divisions. Use positions and position hierarchies to show the reporting groups existing in your enterprise.

Additional Information About Roles

As you define roles in your enterprise you can describe their responsibilities, requirements, and working conditions. This can be done in a number of ways:

- For positions you can enter the location, probation period and working hours in the standard fields. Entering location and working hours for an organization provides a default for all positions within that organization.
- You can attach documents, for example, text describing the objectives and tasks of the job or position, to each record.
- You can add up to twenty additional fields to each window in a descriptive flexfield. These fields can be global (they always appear) or context-sensitive (they appear only when triggered by another piece of information). For example, you could set up fields to record the health and safety requirements of a position, or its suitability for job share.
- You can add any number of Extra Information Types (EITs). This would enable you to set up fields to hold information to which only users with certain responsibilities would have access. For example, you could set up fields only to be used by managers.
- You can enter competencies against both jobs and positions. Then, using the suitability matching tool, you can match employees' competencies to those required by a job or position. This enables you to identify training needs or rank potential successors. You can also enter which position is the planned successor for each position in your enterprise.

Position Hierarchies

If you use positions to define roles, you can define *position hierarchies* to show the detailed line management reporting in each organization or throughout the enterprise.

You can create and maintain your reporting structures in two ways:

- Using the Position Hierarchy window
- Using the Position Hierarchy Diagrammer

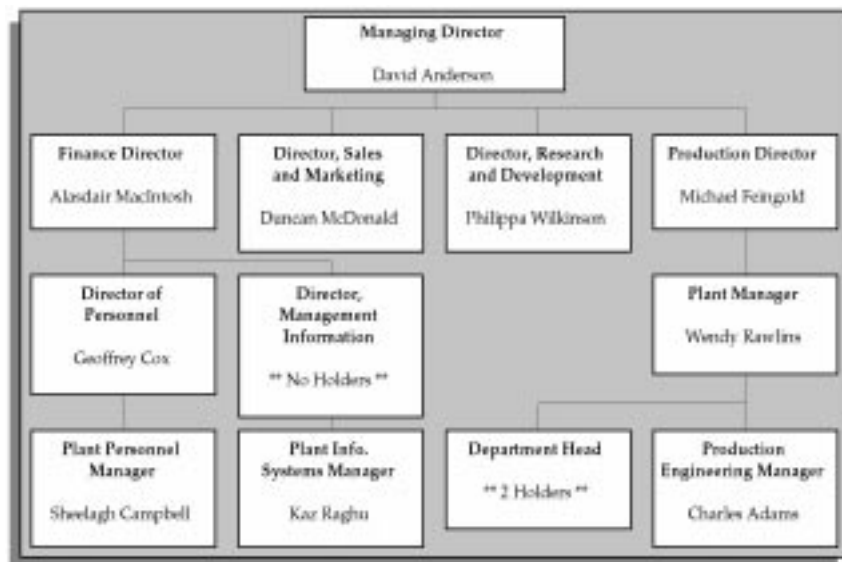
The Hierarchy Diagrammer, included with Oracle HRMS, enables you to create your position hierarchies graphically, and make intuitive drag-and-drop changes to them.

See: Introduction to Hierarchy Diagrams, *Using Applications Data Exchange and Hierarchy Diagrammers*

Position hierarchies are very like organization hierarchies. You can set up a primary hierarchy and multiple secondary hierarchies to show reporting lines, including 'dotted line' reporting, and to control access to information.

Position hierarchies are dated, so you can create future-dated versions to prepare for reorganization in advance, and can retain previous versions for historical information.

Figure 3 – 1 Position Hierarchies



Change and Delete Positions

You can add new positions to an existing hierarchy, or change positions in a hierarchy. You can also delete a position hierarchy, but you must check that it is not tied in to other working areas of the system.

Job and Position Names

Before you define your jobs and positions, decide whether you want to use simple names and codes, or multi-segment job and position names to hold more information.

The name can be a title only, as for example:

- Director
- Analyst
- Training Manager

You can add another segment to categorize the jobs or positions. In this way, you can use segments to identify subgroups of employees within your enterprise. For example, a job name can comprise a title and a job type, such as:

- Director of Finance.Director
- Assistant Director of Finance.Director
- Finance Officer.Professional

Similarly, a position name can comprise a title, a position number, and an indicator showing whether the position is part-time. For example:

- Training Manager.020001.F/T
- Secretary to the Training Manager.020013.P/T

You define the segments of the job and position names and their valid values by setting up the *Job Name key flexfield* and the *Position Name key flexfield*. Normally your system administrator does this.

Jobs and Position Evaluation

Evaluation systems, which compare the responsibilities of roles to help in the definition of grades, are common in large enterprises. The Hay Evaluation System, which is used internationally, is an example. Directly or indirectly, the evaluation can also contribute to setting compensation levels.

Evaluation systems normally use a set of formal and systematic procedures to perform a comparison of roles. As such, evaluation is primarily concerned with the definition of the relative status of a role, and not with a set of absolutes. The objective of all evaluation systems is to place a role in a grading or salary structure.

There are two main types of evaluation system:

Factor	Key roles are examined factor by factor and a rank comparison order produced for each factor. A complex comparison of weighted factors then follows.
Points Rating	A wider range of factors is used. Each factor is weighted and has a numerical scoring system. The total points scored determines the placement of the role in a grade or salary structure.

These systems might incorporate benchmarking, where a few key roles determine the rank of all the others. Grades and compensation levels are determined after the evaluation and ranking of the jobs.

In Oracle HRMS, you can set up one or more evaluation systems for jobs or positions. You use a descriptive flexfield to hold the evaluation information, which provides the flexibility for you to use the evaluation system of your choice.

Business Group Reorganization

Business Group reorganizations often entail changing many employee records in the same way. Because Mass Move allows you to modify multiple employee records at once, you can make such changes conveniently.

You can move a group of assignments to different positions either within an organization or between organizations. You can move assignments to existing positions or create new positions for them. You can also change the grade, location, and standard conditions of an assignment. North American users can also change the GRE/Legal Entity of an assignment.

Preparing for Your Reorganization

To prepare for your mass move, you must make certain decisions and ensure that certain prerequisites are in place.

The following checklist takes you through the main decision areas.

- What is my source organization? (The mass move transfers assignments from the source organization.)
- What is my target organization? (The mass move transfers assignments to the target organization. The target organization can differ from or be the same as the source organization.)
- What is the effective date for the mass move?
- What are the source position(s)? (The mass move transfers assignments from the source position(s) within the source organization).
- Do I want to deactivate the source position?
- What are my target position(s)?
- If my target position(s) are new, will their location and standard conditions be copied from the source position, target organization, or Business Group?
- What grades are valid for the target position(s)?
- Which assignment(s) will transfer from my source position(s) to my target position(s).
- Will the grade of any transferring assignment change during the mass move?
- (North American users) Will the GRE/Legal Entity of any transferring assignment change during the mass move?

- Will the location and standard conditions of any transferring assignment change during the mass move?

Historical Information

As you reorganize your Business Group over time, you will develop an historical archive of mass moves. This archive consists of:

- All executed mass moves for which Status=Complete
- Any executed mass moves for which Status=Complete with Warnings
- Any saved but unexecuted mass moves (Status=Unprocessed or Status=In Error) that you have not deleted

Because it is important to maintain an historical record of Business Group reorganizations, you cannot delete a mass move when its status is Complete or Complete with Warnings. However, you can delete any unexecuted mass moves you chose to save but which have a status of Unprocessed or In Error.

Re-executing a mass move overwrites its original contents. Thus, only the latest re-execution of that mass move would appear in the historical archive.

Maintaining Information for a Business Group

You will maintain specific information for each Business Group that you define. This includes keeping track of Employment Equity information, and Employment Standards for each province in which you do business.

Grades and Grade Structures

Grades are normally used to record the relative status of employee assignments and to determine compensation and benefits, such as salary, overtime rates, and company car.

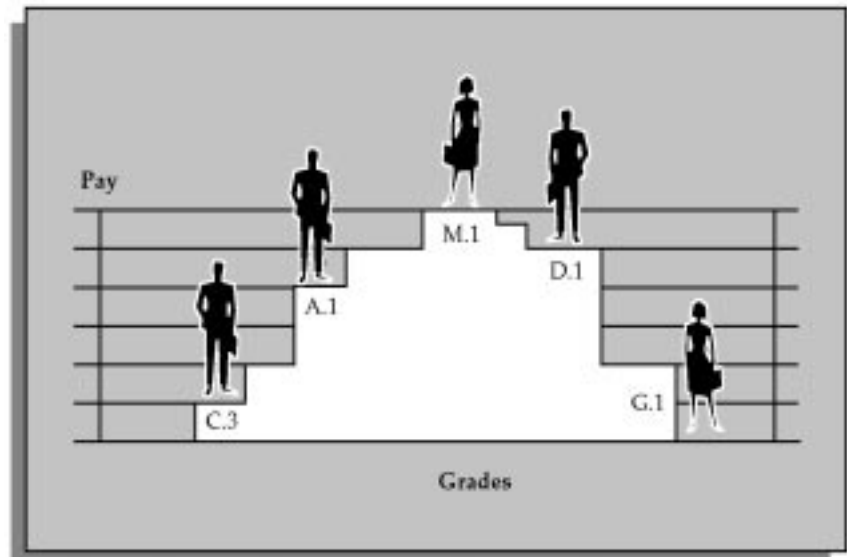
Using Grades to Compare Roles

You can define one or more valid grades for each job or position. You enter this information in the Valid Grades window, which opens from the Job window or the Position window.

When you enter a grade assignment, the list of grades shows which ones are valid for the job or position you select.

Grades can have different levels of complexity, which need to be represented in the overall structure of the grade.

Figure 3 – 2 Grades



In its simplest form, a grade can be a single character, or number, in a logical sequence. For example:

- Grade A
- Grade B
- Grade C

By adding a second *segment* to the grade name, you can identify sub-grades, such as:

- Grades A.1, A.2, A.3, and A.4
- Grades B.1 and B.2
- Grades C.1, C.2, and C.3

A more complex structure could be used to distinguish grades for different staff groups, such as:

- Manual.A.1, Manual.A.2, and Manual.G.1
- Clerical.C.1 and Clerical.C.2

In this example, there are three segments in the grade name. A grade is the *combination* of segments you define. You set up the segments and their valid values using the Grade Name Key Flexfield. Normally this is done by the system administrator.

See: User Definable Key Flexfields, *Customizing, Reporting and System Administration in Oracle HRMS*.

Grade Relationships to Compensation and Benefits

In many enterprises there are rule based reward structures based on grade. These rules can relate grades and pay *directly* or *indirectly*. You can associate compensation and benefits with your grades. For example, you can record a minimum or maximum salary for a grade.

There are two approaches:

- Using *grade rates*, you can either enter a fixed value for each grade, or you can enter a minimum, maximum, and mid-point values for each grade.
- Using *grade scales*, you can associate each grade with several points on a pay scale, and enter compensation values for these points.

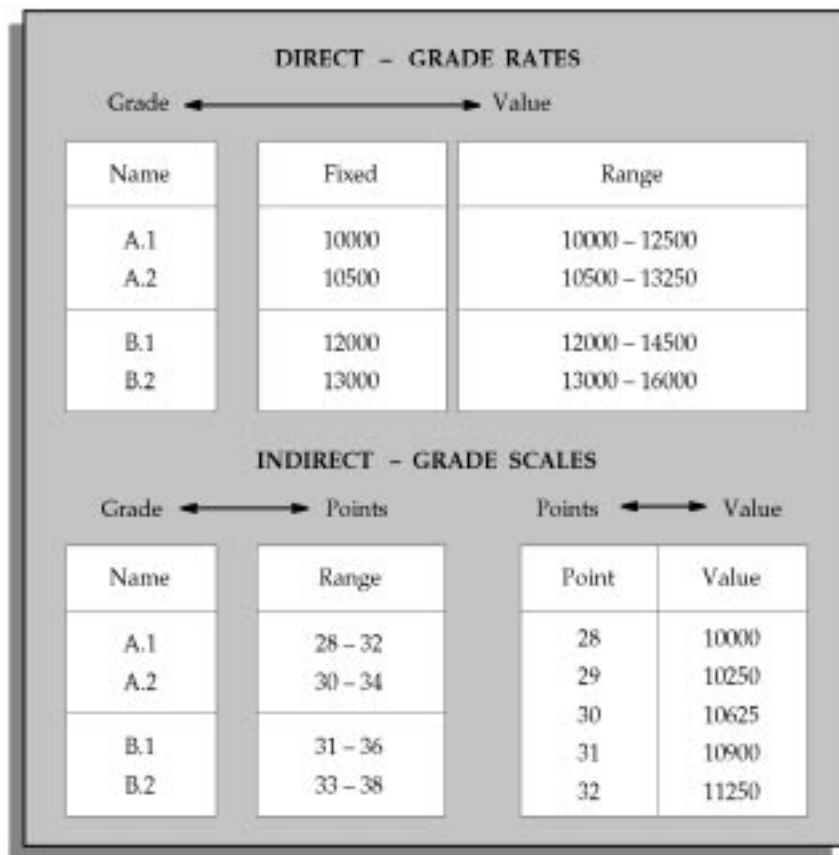


Attention: The compensation information can change independently of the grade. Therefore, you should not define it as part of the grade name. Instead you should relate it to the grade, either directly or indirectly.

Direct Relationship

You may have a salary administration system in which the actual level of pay normally falls between a minimum and a maximum value for a grade. Regular performance reviews and ratings can involve comparison with the mid-point value of pay for your grade. In Oracle HRMS, this is a *grade rate*.

Figure 3 – 3 Relating Grades and Pay Directly and Indirectly



Indirect Relationship

You may be using a step based system of progression points within grades, in which each point has a fixed value in a pay schedule or table. In Oracle HRMS this is a *pay scale*.

Relating pay to grades indirectly is common in government, education and health enterprises. It is also common in large commercial enterprises that negotiate pay levels with staff or union representatives.

Grade Rates to Relate Pay to Grades

In Oracle HRMS, you can set up a table of values related to each grade. These are called *grade rates*. You can enter a fixed value or a range of valid values for each grade.

For example, you might define a salary rate and an overtime rate of pay for every grade, with minimum, maximum, and midpoint values. Both rates would be in monetary units. However, you can also define rates with non-monetary units, such as days, hours, or numbers.

Figure 3 – 4 Grade Rates

The screenshot displays the Oracle HRMS interface for setting grade rates. It features a 'DateTrack' button and two tables, each with a date range of '01-JAN-2000 to 31-DEC-2000'.

Basic Rate Pay

Name	Range
A.1	10000 – 12500
A.2	10500 – 13250
B.1	12000 – 13250
B.2	13000 – 16000

Maximum Hours Rate

Name	Fixed
A.1	37.5
B.1	60

Grade rates are datetracked and this means that you can keep the history of the actual values you use. You can also set up rate values at a future date and be sure that this information will automatically take effect on the date you set, and not before.

You can use your grade rate values:

- As part of a QuickPaint report or inquiry

- To validate salary proposals
- To validate other compensation entries you make for employees

The salary administration process validates salary proposals automatically against the appropriate grade rate. You can use *formula validation* to check other compensation entries.

Automatic Database Item Creation

When you save your definition, an automatic process creates corresponding *database items* that formulas can access.

See: Dynamic Database Items, *Using Oracle FastFormula*.

Pay Scales to Relate Pay to Grades

If you are involved in negotiating pay levels with staff or union groups, you may be using a system of grade steps or points with specific values of pay for each step, or point. For example, you may have negotiated different pay scales with different union groups. Or, you may have negotiated a single set of pay points for all of your employees.

Typically, employees are placed on a step within their grade. They move up the steps for the grade by a periodic incrementing process. This process might run automatically at a fixed time each year or it might be based on a review process specific to the employee.

In Oracle HRMS you set up a *pay scale* to show the separate points and the value negotiated for each point. You can set up any number of pay scales, for example for negotiated pay scales with different unions.

Scale Rates

You create a rate and enter a fixed value for each progression point on a pay scale. You can create as many rates as you require, such as one for a shift allowance, and another for overtime. Notice that, unlike grade rates, you can only enter a fixed value for each point; you cannot enter a range of valid values.

The values are datetracked so that you can keep the history of the actual values you use. You can also set up rate values at a future date and be sure that this information will automatically take effect on the date you set, and not before.

The rates can be defined in monetary units, or as integers, numbers, days, or hours, in various formats. For example, you could define a rate in hours to specify the maximum number of overtime hours that can be worked per week.

Automatic Database Item Update

When you define rates, an automatic process creates corresponding *database items* that formulas can access.

See: Dynamic Database Items, *Using Oracle FastFormula*.

Relate Grades to Progression Points

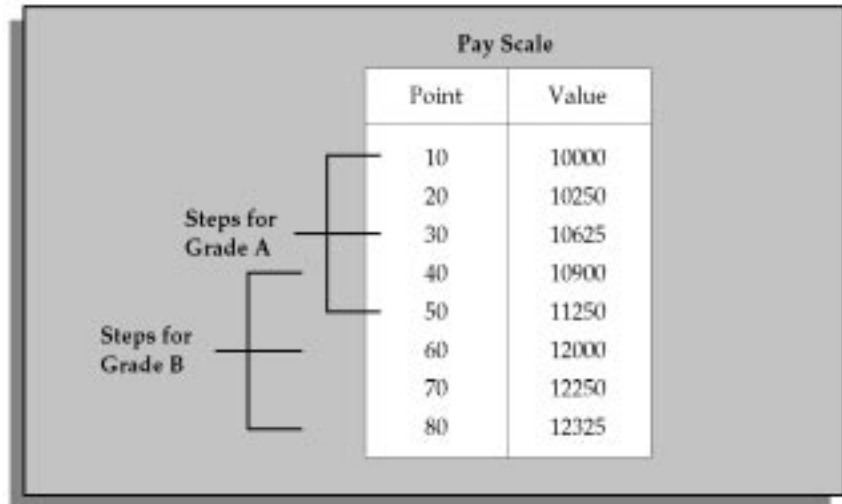
A pay scale defines a complete set of progression points. You can associate a subset of these points with each grade.

The group of points valid for a grade is called a *grade scale*. Each point in the grade scale is called a *step* because it represents the steps for

incrementing an employee's pay. The steps must follow the sequence of points on the pay scale but they can jump several points, if appropriate to the specific grade.

Note: Grade scales are datetracked.

Figure 3 – 5 Grade Scales



Place the Employee on a Grade Step

If you include a grade as part of an employee's assignment, you can place the employee on a step on the associated grade scale.

Scale Rates and Salary Administration

If you are holding salary values as a scale rate, you should not also enter them in a salary element using Salary Administration. Instead you view an employee's salary in the Grade Step Placement window, and change it by incrementing the grade step placement of the assignment. Such increments, or changes to the scale rate, would not affect salary element entries for employees. You would have to update these entries separately.

Use scale rates for employees whose salaries are determined by their grade step placement. Use Salary Administration for employees for whom you determine salary on an individual basis.

Position Hiring Status

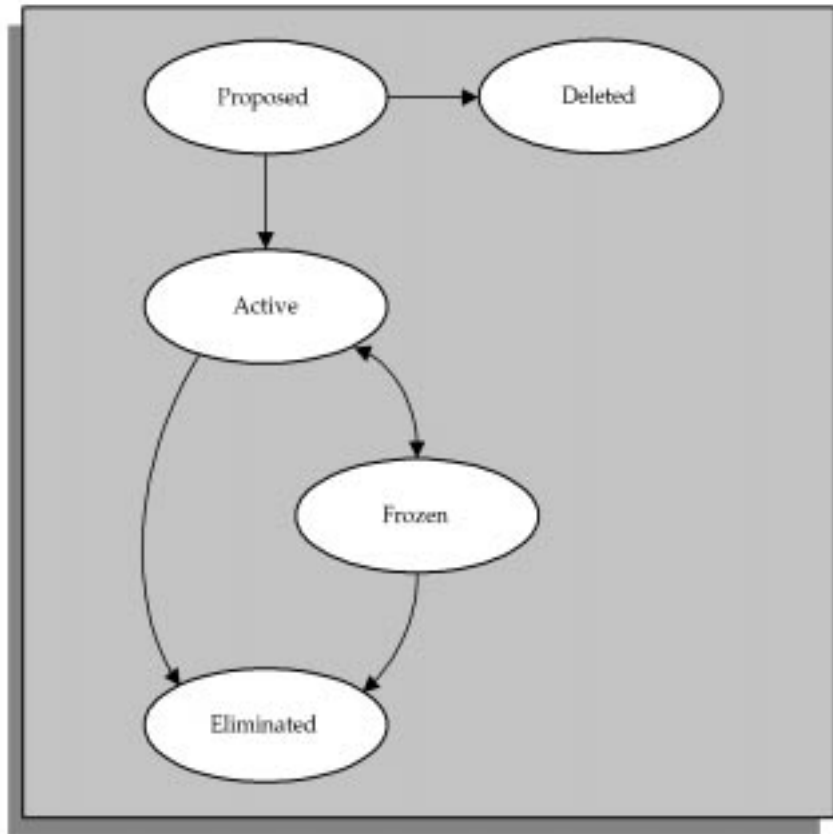
Every position must have a hiring status. The system statuses provided with Oracle HRMS are as follows. You can provide user names for these system statuses and map more than one user name onto each system status, if required.

- Proposed – For modeling or planning.
- Active – Available for use.
- Frozen – Position can continue to be used with current incumbents but no new incumbents can be placed in it.
- Eliminated – Position is no longer in use and will not be required in the future. A position cannot be reactivated when it has been eliminated.
- Deleted – Position was set up by mistake, or never approved. A position can only be deleted before its Start Date (that is, the date on which it was approved for use). A position cannot be reactivated when it has been deleted.



Attention: Positions have a Valid/Invalid status as well as a hiring status. You cannot assign an employee to an Active position if its status is Invalid (or a user defined status). You can only assign to a position with an Active hiring status *and* a Valid (or blank) main status.

Figure 3 – 6 Valid Changes to Position Hiring Status



Position Extra Information Types

You can define as many Extra Information Types as you require to hold additional information about positions. There are also some predefined Extra Information Types. These are:

- Seasonal Information – the estimated start and end dates for the season relevant to a seasonal position. You can enter a day and month without a year so that the information does not need to be updated each year.
- Reservation Information – the reason for reserving a position (or part of its FTE), the person it is reserved for, and the start and end dates of the reservation.

For example, the reservation status could be New Hire, in which case the start date would be the date the offer is made or accepted.

You can add your own reservation statuses using the Lookup Type POSITION_RESERVATION_STATUS. Two values are seeded: Management Discretion and New Hire.

- Overlap Information – the proposed start and end dates of the period of overlap between one incumbent leaving and a new incumbent starting work in the position.
- Position Family – one or more classifications for the position.

You create your own position families using the Lookup Type POSITION_FAMILIES.

Project Based Enterprises Example

Project based enterprises are often service based industries where flexibility and organizational change are key features. Examples are consultancy or construction companies, or small manufacturing or software companies.

Single Projects

In these enterprises, employees are assigned to work on single projects for a given period of time. For example, an engineer working on a large scale construction project might be assigned to the project for a period of six months. All their work and costs are associated with this one project. When this is complete the employee moves on to perform a similar role on another project. In this example you would expect the employee to have a single assignment, with 100% of the assignment costs allocated to a single project. The employee assignment might also contain project specific information, such as location or group information.

Multiple Projects

In a different situation, an employee might be assigned to a number of projects at the same time. For example, consider an Applications Consultant working for Oracle Corporation. This person is employed as a consultant by a specific organization within Oracle but the project work is undertaken outside Oracle. The consultant performs similar tasks in different implementation projects, and costs are allocated on the basis of actual time spent working on each project. In this example you would expect the consultant to have a single assignment in Oracle HRMS and the project allocation and costs to be entered as timecard information.

In both of these examples, employees perform specific roles, but they work on different tasks or projects at different times. Project based enterprises normally have a fluid organization structure with regularly changing reporting and management lines. This fluidity provides the flexibility required to compete in rapidly changing markets.

Organizations can be formed or transformed at short notice as different projects or management groups are formed. Employees can be assigned and reassigned to these organizations, also at short notice, although they normally retain their basic role, or job.

Representing Organizations and Jobs

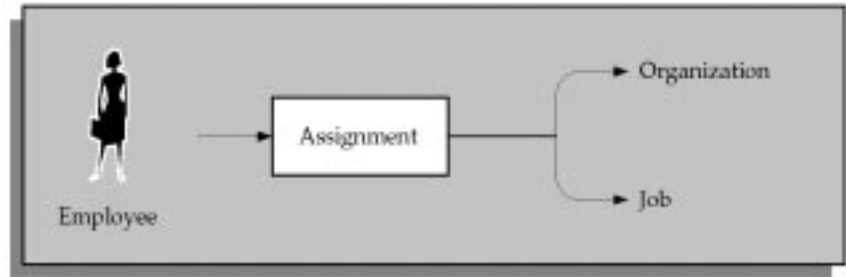
To represent both single and multiple projects, you need the ability to define and change organization structures quickly and easily. You must also be able to move employees between organizations while keeping

the same job. For both of these reasons, you would probably use organizations and jobs to show how people are assigned and managed.

Jobs

Jobs are independent of organizations. In the Assignment window, you can change the assignment organization or job independently.

Figure 3 – 7 Project Based Assignments



Typically, you would not define Positions to show this type of working. Positions require additional definition and maintenance, and do not reflect the sort of flexible working environment found in this type of enterprise.

Organizations

Working with organizations and jobs as the basis of the employee assignment, you can also consider how you would reflect the assignment of the employee to individual projects. There are a number of possible options to consider.

- Use organizations to show actual projects, and assign employees to projects.
 - Useful for single projects. For multiple project assignments you would need to use multiple assignments.
- Use a People Group flexfield segment to hold the project code.
 - An alternative for single projects, where you want to use the organization to show internal management structures. However, for multiple project assignments you would still need to use multiple assignments.
- Use a Cost Allocation flexfield segment to hold the project code.
 - Useful for both single and multiple project assignments. You can collect project cost information at the work assignment or the timecard entry level.

Organization Structures

You should define organizations down to the level of individual managers, and use the manager flag on the Assignment window to identify the manager of each organization. Also, define your primary organization hierarchy to show the detailed management reporting lines among organizations and managers. In this way you can show that employees assigned to an organization are managed by the organization's manager.



Attention: It is best not to use the *Supervisor* field of the assignment window to identify managers for individual employees. This field is used to identify a personal supervisor for an employee and is not updated if the supervisor moves to another job or organization.

Job Structures

In this type of environment, jobs show the specific roles employees perform. Therefore, you are likely to have multi-segment job names to distinguish different types and different levels of jobs in the enterprise. For example, you might define a three segment job name with *Job Group*, *Title*, and *Job Level*. An actual job combination might then be 'Applications.Consultant.Senior'.

Project Allocation and Costing

With this type of implementation, you would probably use the assignment to identify management type reporting. You would identify project-working using a segment of the Cost Allocation flexfield to show *Project Code* for each assignment.

If you set the qualifier Assignment to Yes for this segment, you could enter percentage costs for the assignment to different project codes. If you set the qualifier Element Entry to Yes, you could use a timecard element to record and cost the actual hours worked on each project.

See: Data Costed at the Organization and Assignment Levels: page 5 – 12

Other Management Issues

When you consider this environment there are other areas your decisions may affect:

Remuneration Policies	Individual compensation and benefits are often based on personal negotiation, or performance
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	<p>reviews. Therefore you will probably have fewer rules to determine policy and more consideration of the actual values entered for an employee.</p>
Grades and Jobs	<p>Typically grades and jobs are very closely linked. For example, the name Senior Consultant may identify both the role of an employee and his or her relative status and eligibility for compensation and benefits.</p> <p>You may decide to set up the same structures for both the job and the grade. This will be true if you want to set up rates of pay with minimum and maximum values associated with your grades.</p>
Budgets	<p>Headcount budgets are usually allocated at the level of the organization, or the combination of organization and job.</p> <p>You can calculate your salary budgets from the definition of organization and job headcount budgets, combined with valid grades and grade rate information.</p> <p>Actual salary costs in an HR environment can be calculated from the actual salaries of assigned employees.</p> <p>Actual salary costs in an environment including Oracle Payroll can be calculated directly from payroll results.</p> <p>See: Salary Budgeting, <i>Managing People Using Oracle HRMS</i>.</p>
Vacancies and Recruitment	<p>Vacancies are not created by default whenever an employee leaves. Managers often have the freedom to decide if they want to replace an employee, or to recruit to a different role.</p> <p>The recruitment process is often informal and allows for recruitment by resume (or CV). Individual managers are usually responsible for interviewing and selecting candidates. This may be on a one-to-one basis.</p>
Career Planning and Development	<p>The need for individual career planning and development is matched by the need to identify skilled employees for specific projects, jobs, and positions.</p>

Using a competence-based approach, you can identify, and measure the competencies held by your employees and match them to work opportunities. Depending on the structure of your enterprise, you can model career and succession plans using either career paths or position hierarchies. This enables you to both continue to develop your employees, whilst ensuring that you have potential successors for all your positions.

Rule Based Enterprises

The rule-based enterprise is often a highly structured environment in which all aspects of work and remuneration are well organized and regulated. Common examples of this type of enterprise are found in government, education, health and other public sector industries. A key feature of this type of enterprise is the concern with managing positions, or posts. Positions exist, and are managed independently of people in post.

You can picture the role type organization as a 'Greek temple', whose strength is in its pillars. These pillars are the specialist functions or departments that exist within the enterprise. They are strong and almost independent organizations. For example, the Finance department would have very little involvement in the working of the HR department.

Coordination between the groups takes place at the top of the structure by a narrow band of senior management – the pediment. In this environment it is assumed that this should be the only personal coordination needed. If the separate pillars do their job, as laid down by the rules and procedures, the ultimate result will be predictable.

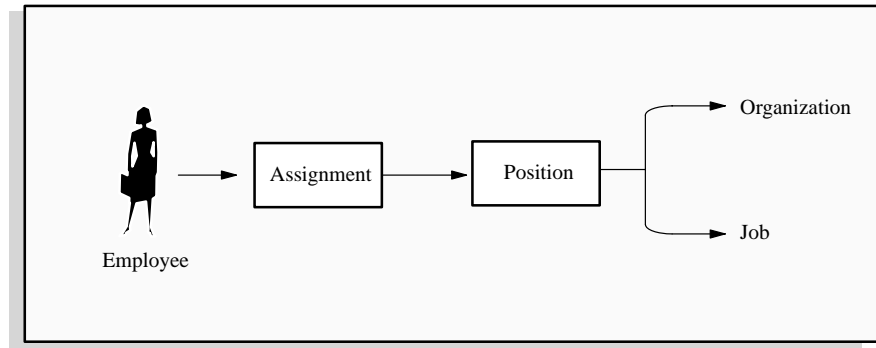
Roles are usually more important than individuals. People are selected for satisfactory performance of a role, which is described so that a range of individuals could fill it. Reward systems are likely to be role or rule-based.

Often, clearly defined procedures exist for every task and process within the enterprise. For example, job descriptions and job evaluation procedures define individual roles and positions of authority. Also, it is common to find that procedures exist to govern communications, such as colored and numbered forms, committee reports, and so forth.

Representing Positions

Positions are most appropriate for this type of enterprise and provide the finer detail on work structure and line management that is needed in a fixed establishment. Employees are assigned to a position, and by definition to the organization and job for that position.

Figure 3 – 8
Position based assignments



Because you focus on the use of positions and position hierarchies in this model you define organizations to show only the major divisions in your enterprise. You can model the details of these departments and sections using your position hierarchies. (If you also define detailed organizations and hierarchies, you are defining the same structural information twice.)

In this situation, jobs provide an additional level of information for positions, which is independent of any specific organization. For example, you may want to define *job types* of Managerial, Executive or Clerical so that you can identify skill requirements and levels of benefits for each job.

Position Name

In this environment you should consider using the segments of the position name to hold other key information about the position. For example you may want to consider using the following as segment values:

- Cost Code

To show the cost center, or a cost code for each position in your establishment, you could use the same list of cost codes as your general ledger.

- Funding Organization.

To show funding for a position from an external source. For example, government funding.

- Multiple assignments allowed – Y/N?

In Oracle HRMS a position can have any number of holders. You can set headcount budget values to track any variance on budget, or you could use this type of segment to prompt users.

- Current status.

As part of your position control procedures you may need to mark the status of a position for reporting or management purposes. For example, you can label a position as Frozen, Vacant or Active.

Note: You can use the Additional Position Details descriptive flexfield to hold this type of information about positions if you do not want the information to be visible to all users.

Management Reporting Lines

You can define a primary position hierarchy to show the management reporting lines for all your positions. You should find that most of your security and reporting needs are based on this primary hierarchy. Groups are identified by selecting a manager and all the positions that report to that manager in this hierarchy.

Other Management Issues

When you consider this environment there are other areas your decisions may affect:

Remuneration Policies	<p>Individual compensation and benefits are often regulated, or based on union negotiated agreements.</p> <p>Reward systems are usually based on the role performed rather than on personal or performance assessment. This may mean that you have to define detailed eligibility rules for compensation and benefits.</p>
Comparative Grades and Positions	<p>Valid grades are defined for positions and it is common to use grade steps and progression points.</p> <p>National or union pay scales establish actual rates of pay for a grade and this is independent of performance. An employee is paid the rate for his or her grade and step. Incrementing rules, which determine progression to the next step, are usually part of the plan and are often time-based.</p> <p>Job evaluation methods exist to compare roles across the industry with agreed grading structures and rates of pay.</p>
Budgeting	<p>Headcount or full-time equivalent budgets are usually set for each position.</p>

You can calculate your Salary budgets from the position budgets, combined with valid grades and progression point information.

In an HR environment you would calculate actual salary costs, at any time, from the current salaries of assigned employees.

In an environment including Oracle Payroll, you would calculate actual salary costs directly from payroll run results.

Vacancies and Recruitment

There is an automatic vacancy when an employee terminates employment. The position exists even when there are no holders.

The stages of the recruitment process and the procedures surrounding these are probably well defined and regulated.

Standard letters for each stage of the process are also likely to be well established.

In this environment people are recruited for their ability to perform a role. You would hold job descriptions and skill requirements for each position using attachments for text and the Special Information Type for structured data.

Standard Reports

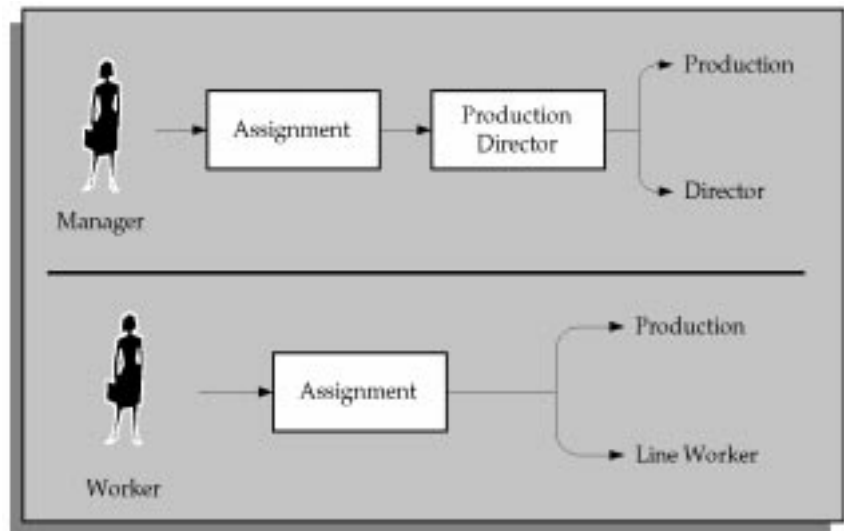
Typically there is a well defined set of standard reports needed in this environment. Often these are required by government.

Hybrid Enterprise Structures Example

Many enterprises combine different types of structure for different groups of employees. Typical of these hybrid types are large manufacturing or corporate enterprises where management and administrative roles are fixed into specific organizations, but other roles are managed in a more flexible manner.

In Oracle HRMS you would set up this type of hybrid enterprise using positions for some groups of employees, and organization and jobs for others. For example, in one factory organization you might define a position for the Production Manager, and one job for all production line workers.

Figure 3 – 9 Hybrid Enterprise Assignments



Employee Assignments

In this type of enterprise most of your workers would be assigned to an organization and a job. However you would define management positions because they have the characteristics of fixed roles within specific organizations, including the idea of automatic vacancy on termination of the assignment. In each organization you would have only one position. This would be the manager, and by default, any other employee who works in the organization would report to the manager.

Other Management Issues

Other issues for managing groups of employees by position, or by organization and job are the same as for Project Based Enterprises: page 3 – 26 and Rule Based Enterprises: page 3 – 31.

Remuneration Policy	Employees working in unionized jobs participate in negotiated rates of pay and conditions. You would define grade rates or progression points to deal with negotiated pay rates for workers in jobs.
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Salary Administration	Employees in management positions are more likely to have their salary administered personally and be reviewed on their performance. You define grade rates and salary bases to deal with salary administration for employees in positions.
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Contract Staff and Other Non-Standard Assignments Example

It is common to find individuals working within an enterprise who do not fit into the general definition of work structures. For example, you may have agency or contract staff working temporarily to cover a vacancy, or you may have external contract staff working as part of a project team.

The way in which you record information for these individuals depends on how you manage them:

- You can treat the assignment for this type of employee in exactly the same way as any regular employee.
- Alternatively, you could set up a different *person type* to distinguish this type of employee.
- You could define your own types of *employment category* to distinguish different ways of working at the assignment level.
- You could define and use your own *assignment statuses* to identify different ways of working in a particular job or position.

However, you may decide that the person does not work in a predefined role, but is simply working in a particular organization for a set period of time. To do this you would assign the employee to an organization only, and focus on the other assignment information for further information.



Attention: A basic rule in Oracle HRMS is that an employee must have an assignment. The minimum work structure required for an assignment is the Business Group.

Creating and Maintaining Position Hierarchies

Complete the following steps to create a position hierarchy:

1. Define a Position: page 3 – 43
2. Create a Position Hierarchy: page 3 – 63

Once you have created a position hierarchy, you can:

- Create a New Version of a Position Hierarchy: page 3 – 64
- Copy an Existing Hierarchy: page 3 – 65
- Delete a Position Hierarchy: page 3 – 66
- Change a Position Hierarchy: page 3 – 67
- Run the Position Hierarchy Report: page 3 – 68

Reorganise Your Business Group

Use the Mass Moves feature to reorganize positions, and the people assigned to them. You can also identify source and target positions for your mass move.

1. Describe Your Mass Move: page 3 – 69
2. Identify Your Source Positions: page 3 – 70
3. Identify Your Target Positions: page 3 – 71
4. Verify the Transfer of Assignments for each Source Position: page 3 – 72
5. Verify or Add Valid Grades for each Target Position: page 3 – 74
6. Execute the Mass Move: page 3 – 75
7. Review the Mass Move: page 3 – 76
8. Re-Execute a Mass Move: page 3 – 77

Relate Pay to Grades Using Pay Scales

1. Define a Pay Scale: page 3 – 81
2. Define Scale Rates: page 3 – 83
3. Relate Grades to Progression Points: page 3 – 84
4. Place an Employee on a Grade Step: page 3 – 85
5. Increment Grade Step Placements: page 3 – 86
6. Run the Current and Projected Progression Points Values Report:
page 3 – 87
7. Run the Employee Increment Results Report: page 3 – 88

Defining a Job

You use the Job window to define jobs, the skills that jobholders require, and the grades to which they can be assigned. You can also enter job evaluation scores, if you have set up a job evaluation system.

Check with your HR manager or system administrator whether this is the right window for entering job requirements. You use the Job window if requirements were defined using Special Information Types. You use the Competence Requirements window if you are following the competence approach.

If you intend loading historic assignment details into Oracle HRMS, make sure you enter valid start dates for your jobs. You cannot assign an employee to a job before the start date of the job.



Suggestion: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This simplifies your data entry.

► To define a job:

1. Enter a start date early enough to handle any historical information you want to enter.
2. Enter a unique name for the job. If there is more than one segment in the Job Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.
3. Save the job.
4. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the job.

See: Entering Evaluation Information: page 3 – 56

5. Choose the Requirements button to enter job requirements, such as required qualifications or valid experience, to help you match people to roles.

See: Entering Job and Position Requirements: page 3 – 59

Note: You use the Competence Requirements window to enter competencies if you are following the competence approach.

6. Choose the Valid Grades button to enter the grades to which jobholders can be assigned.

See: Entering Valid Grades for Jobs or Positions: page 3 – 57

7. Choose the Survey Mapping button to link salary survey lines to your job.

See: Mapping Salary Survey Lines, *Managing Compensation and Benefits Using Oracle HRMS*.

8. Choose the Extra Information button to enter job categories for the job. You can link as many categories as you need to a job.

Note: You can investigate the job categories in your enterprise using HRMS Intelligence.

See: Oracle HRMS Intelligence, *BIS 11i User Guide Online Help*.

There may also be other types of job extra information defined for your enterprise.

Note: You can only access job categories and other types of Extra Information if your system administrator has set them up for your responsibility.

Defining a Position

You use the Position window to define positions within your organizations and to add them to position hierarchies. You can also enter the skills that position holders require and the grades to which they can be assigned. You can enter position evaluation scores, if you have set up a position evaluation system.



Attention: Use this version of the Position window if you are using any of the Oracle HRMS applications. This version is datetracked, enabling you to keep a complete record of changes to position definitions. If you do not use Oracle HRMS at your site, use the non-datetracked version of the Position window.

Position Control

The four check boxes at the top of the window (Open, Under Review, Approved Future Actions and Temporarily Transferred) are not used in the first version of Release 11*i*. They will be used for Position Control, to be available in a later release.

► To define a position:

1. Set your effective date early enough to handle any historical assignment information you want to enter.. You cannot assign an employee to a position before the start date of the position.



Suggestion: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This will simplify your data-entry.

2. If you are selecting the Active hiring status for the first time (see step 9), enter a Start Date. This is the earliest date on which a person can be hired into this position.
3. Enter a unique name for the position in the Name field in the Position Details tabbed region.

Note: The Name field at the top of the window displays the latest name on record for the position, irrespective of your effective date. This name is used on all other windows, such as assignment.

If there is more than one segment in the Position Name flexfield, a window opens when you enter the Name field. You must enter a unique combination of segments in this window.

4. Select the position type. The choices are:
 - Single Incumbent, meaning that only one employee is allowed to hold the position at any time

- Shared, meaning there can be several incumbents, up to the value of the FTE field
 - Pooled (Public Sector only), meaning the position is loosely defined so rules about FTE and hours are not enforced by the system
 - None, which you can select if you do not need to record position types
5. If the position is permanent and budgeted every year, select the Permanent check box.
 6. If the position is only used in one season each year (such as a summer teacher), select the Seasonal check box. You can enter the season dates in the Seasonal Information extra information type.
 7. Select the organization and job for this position. They must have a start date on or before the start date of this position.
Note: You cannot change the organization or job once you have saved the definition.
You can set up several positions that have the same job in the same organization. Each position name must be unique.
 8. If you know that the position will be transferred to another organization or job in the future, enter the proposed end dates now, for information.
 9. Select a hiring status. See: Position Hiring Status: page 3 – 23.
The Start Date field indicates when the current hiring status came into effect.
 10. If the status is Frozen, you must enter a proposed end date for the status. Optionally, you can enter a proposed end date for Proposed or Active statuses, for information.
 11. Select a location for the position, or leave the default, which is the location of the organization.
 12. Optionally, select a status for the position.
Selecting Valid or leaving the Status field blank enables employees to be assigned to the position, provided other conditions (such as an Active hiring status) are met. If the status is Invalid or any other status defined at your site, employees cannot be assigned to the position.

Entering Hiring Information

13. Enter the number of Full Time Equivalents to be assigned to this position. If the Position Type is Single Incumbent, FTE must be 1.0 or less.

14. You can enter the number of incumbents that are planned for the position in the Headcount field.
15. If appropriate, select a bargaining unit code for the position. This is usually the legally recognized collective negotiating organization.
Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE.
16. If required, enter the earliest date at which incumbents can be hired into this position. If you have created a requisition and vacancy for this position, the earliest hire date must be within the vacancy dates.
17. Enter the date by which the position should be filled. This date must be on or after the Earliest Hire Date.
18. Select the Permit Recruiting check box if the position is not open but you want to enable advertising, job posting and acceptance of applications.
For example, you might select this check box for a position that is frozen but due to become active in the near future.

Proposed Entry Salary

19. Select the payroll to which the position's incumbents are normally assigned. This payroll's calendar can be used for calculations of budgeted amounts and commitments.
20. Select the salary basis to which the position's incumbents are normally assigned.
21. Select the default grade to be used to determine the entry salary of position incumbents.
Note: If you maintain information about valid grades for the position or the position's job, this grade must be one of the valid grades. See: Entering Valid Grades: page 3 – 57.
22. Do **one** of the following, or leave these fields blank:
 - If the position is paid from a pay scale, select the grade step and scale rate that represent the entry level salary for this position. The system displays the value of the step on the scale rate you selected.
 - If you maintain a grade rate to hold entry salary for this position, select the appropriate grade rate. The value or range (minimum, maximum and midpoint values) for this grade rate are displayed.

Probation Period

23. If there is a probation period for this position, you can enter its length in the Probation region.

Overlap

24. Select the length of time a new incumbent can overlap with a leaving incumbent for transfer of skills.

Note: You can enter proposed start and end dates for particular periods of overlap using the Extra Information Types window.

Entering Work Terms

Note: The Working Hours and Normal Start and End Times default from the organization, but you can override them.

25. Enter a number in the Working Hours field, and select the corresponding period of time in the Frequency field. For example, enter 40 and select Week.
26. Enter the normal start and end times in 24 hour format. For example, for 5.30 p.m., enter 17:30.
Note: If this position operates within a shift system or has an unusual work schedule, you can record the shift pattern or days worked in the Work Choices window. See: Entering Work Choices for a Job or Position: page 3 – 60.
27. Select the name of a person who supervises this position. See also the Supervisor field in the Related Positions region if the position is supervised by the holder of a specified position rather than a named person.
28. Select the Replacement Required field if you want users to be warned that they should enter the name of a replacement when they enter an absence for a holder of this position. You might do this for positions where it is essential that a person is in charge at all times. See also step 31.
29. **European users:** Select the Works Council Approval check box if the position falls under the jurisdiction of a Works Council.

Related Positions

30. Select the position held by the supervisor or manager of this position.
31. In the Relief field, you can select the position that should be held by people who cover this position when the incumbent is absent.
32. Select the position from which a successor will move to fill this position.

Extended Pay Term

33. For academic positions, if salary can be paid over a longer period than the work term (such as a 9 month appointment paid over 12 months), select the Extended Pay Permitted check box.

34. If extended pay is permitted, enter the start and end dates of the work and pay terms.

Entering Additional Details

35. If required, enter comments, a posting description for recruitment purposes, and any special confidentiality or security requirements, such as a clearance level.
36. Save your position.
37. If you want to add the position to one or more position hierarchies, choose the Reporting To button. Select a hierarchy and the name of the position to which this position reports.
38. Choose the Evaluation button to enter evaluation information and an overall evaluation score for the position.

See: Entering Evaluation Information: page 3 – 56.

39. Choose the Requirements button to enter position requirements, such as required qualifications or valid experience, to help you match people to roles.

See: Entering Job and Position Requirements: page 3 – 59

Note: Check with your HR manager or system administrator whether this is the right window for entering position requirements. You use this window if requirements were defined using Special Information Types. Use the Competence Requirements window if you are following the competence approach.

40. Choose the Valid Grades button to enter the grades to which position holders can be assigned.

See: Entering Valid Grades for Jobs or Positions: page 3 – 57

41. Choose the Occupancy button to view all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This information could be relevant for selecting people with the necessary skills for similar positions.

See: Viewing Position Occupancy: page 3 – 61

42. Choose the Work Choices button to enter work choices that can affect an employee's, applicant's, contractor's, or ex-employee's capacity to be deployed within your enterprise (or a customer's).

See: Entering Work Choices for a Job or Position: page 3 – 60

43. Choose the Survey Mapping button to link salary survey lines to your position.

See: Mapping Salary Survey Lines, *Managing Compensation and Benefits Using Oracle HRMS*.

44. Choose the Extra Information button to enter any additional information required by your enterprise.

See: Position Extra Information Types: page 3 – 25

See: Entering Extra Information, *Customizing, Reporting and System Administration in Oracle HRMS*.

Defining Position Hiring Statuses

Several system hiring statuses are provided with Oracle HRMS. You can provide user names for these system statuses and map more than one user name onto each system status, if required. Use the User Types and Statuses window.

Note: You can view any lookup type in this window. However, in the current release, you can only define user names for position hiring statuses.

► **To define user hiring statuses:**

1. Select the entity for which you are defining user types. For hiring statuses, this is POSITION_AVAILABILITY_STATUS.
2. Select a Business Group or leave this field blank if you want your hiring statuses to apply in all Business Groups.
3. To see the user statuses already defined for the Business Group (or across all Business Groups), choose Find All from the View menu.

You can overwrite the displayed user types if you want users at your site to see a different status name.

If you want more than one user status for a system status:

4. Choose New Record from the Edit Menu.
5. Select the system status and enter your new user status.
6. Save your work.

Entering Additional Information About Jobs and Positions

As you define roles in your enterprise, you can describe their responsibilities, requirements, and working conditions. There are a number of ways to enter additional information about a role:

- For positions, you can enter the location, probation period and working hours in the standard fields.

See: Defining a Position: page 3 – 43

- You can attach documents to each job or position record.

See: Using Attachments, *Customizing, Reporting and System Administration in Oracle HRMS*.

- You can add up to twenty additional fields to the Job window, and up to thirty to the Position window using a descriptive flexfield.

See: User Definable Descriptive Flexfields, *Customizing, Reporting and System Administration in Oracle HRMS*.

- You can add any number of Extra Information Types (EITs) to each window.

See: Setting Up Extra Information Types (Excluding Organization EITs), *Customizing, Reporting and System Administration in Oracle HRMS*.

- You may need to add other information, such as required qualifications or valid experience. You do this by entering competencies against jobs and positions.

See: Defining Competence Requirements – No Core Competencies, *Managing People Using Oracle HRMS*.

Comparing and Relating Roles

You may also want to relate roles to each other and define the relative grading of the roles. You can relate roles in the following ways:

- By forming multiple hierarchies of positions to show reporting relationships or career paths.

See: Creating a Position Hierarchy: page 3 – 63

- By linking jobs into multiple career paths to show suggested progression paths.

See: Defining Career Paths, *Managing People Using Oracle HRMS*.

- By recording successor positions and relief positions (to cover in the case of absence) against each position.

See: Defining a Position: page 3 – 43

- By recording the grades that are valid for each job and position.
See: Entering Valid Grades for Jobs or Positions: page 3 – 57
- If you use an evaluation system (such as the Hay Evaluation System) to compare roles, you can set up fields to hold evaluation information and an overall score for each job and position.
See: Job and Position Evaluation: page 3 – 11

Changing a Position

You can update the definition of a position at any time, and the system maintains a complete record of your changes using DateTrack.

You cannot change a position's hiring status if it is Eliminated or Deleted. For a description of valid changes to hiring status, see: Position Hiring Status: page 3 – 23.

If a position's hiring status is proposed, you can change its start date. However, if the position's hiring status is Active, you can only change the start date before you make any other updates to the position. If you have made other updates, you must set your effective date before these updates. (Use DateTrack History to see when the updates were made.) Then you can change the start date. This change is always a correction, not a datetracked update.

If you want to record the source of changes, such as formal amendments from a governing body, use the Amendment Information fields.

► **To change a position:**

1. Set your effective date to the day the changes come into effect.
2. Update the position definition as required.
3. To record amendment information, choose the Additional Detail tab.
4. Enter a reference number, details of the recommended amendment, and the date on which the amendment takes effect in the Amendment Information region.
5. Save your changes.

Changing a Job or Position's End Date

- ▶ **To change a job's end date:**
 - Edit the To field in the Dates region.
- ▶ **To enter a position's end date:**
 - Set your effective date to the end date, delete the position and select the option End Date in the DateTrack dialog box.

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

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

Recording Proposed Layoff for a Position

For planning purposes, you can record information about a proposed layoff. When the layoff actually occurs, you terminate the employees, reduce the position's FTE, and change its hiring status to Frozen or Closed Due To Layoff.

► **To record a proposed layoff:**

1. Choose the Hiring Information tab.
2. Enter the amount by which the position's FTE is to be reduced and the date on which the layoff is expected to take effect.
3. Save your changes.

Creating an Evaluation System

► **To create an evaluation system:**

1. Decide whether to hold the evaluation information for jobs or for positions, depending on your own definitions of employees' roles within the enterprise model.
2. Define values for the Lookups Types EVAL_SYSTEM (evaluation system name) and EVAL_SYSTEM_MEAS (the units in which to measure the evaluation). If you use more than one system, you can define multiple values to provide a list of values in the Job Evaluation and Position Evaluation windows.
3. Define the structure and segments of the Additional Evaluation Details descriptive flexfield, which holds the evaluation information. This descriptive flexfield displays on the Job Evaluation and Position Evaluation windows.

For example, you could define the following segments:

- Responsibility
- Problem Solving
- Know How
- Related Grade

If you are using more than one evaluation system in your enterprise, you should make the flexfield segments *context sensitive* to the evaluation system. Context sensitive segments ensure that each system has its own distinct set of evaluation information.

Your system administrator usually carries out this task as it requires access to parts of the system that control how Oracle Human Resources works.

Entering Evaluation Information

Enter evaluation scores and details in the Job Evaluation or Position Evaluation window.

► **To enter a job or position evaluation:**

1. Select the evaluation system used to evaluate this job or position.
2. Enter the overall score and select the units of measurement.
3. Enter the date of the evaluation.
4. Open the descriptive flexfield window, and enter the information it prompts you for.

Entering Valid Grades for Jobs or Positions

When you have evaluated the relative status of your roles (using an evaluation system or some other approach), you can associate valid grades with each role. You may choose to define valid grades for a few key roles and then use these as benchmarks for all other roles.

When you assign an employee to a grade, the list of grades you select from indicates which grades are valid for the employee's job or position.

You enter valid grades in the Valid Grades window for a job or position.

► **To enter valid grades:**

1. Query the job or position and select the Valid Grades button.
2. Enter and save the valid grades for each job. You can enter a single grade, or a set of grades.

Select as many valid grades as you require.

Note: The Date From defaults to the date the job or position becomes active, or the date the grade becomes active, if this is later. You can change this date.

Deleting Grades

- ▶ **To remove a grade from the list of grades to which employees can be assigned:**
 - In the Grades window, enter an end date against the grade.
- ▶ **To delete a grade entirely from the system:**
 1. Reassign anyone already assigned to the grade to another grade.
 2. Highlight the grade in the Grades window and choose Row Delete.

If you have historical records using the grade, you cannot delete it. You can only enter an end date to prevent further assignments to this grade.

Entering Job and Position Requirements

Using the Job Requirements window and Position Requirements window, you can store any personal attributes or experience required by a job or position. You can then use this information to list employees or applicants who might be suitable to hold the job or position.

Note: If you are following the competence approach for suitability matching, enter competence requirements for jobs and positions in the Competence Requirements window.

► **To enter job or position requirements:**

1. Select the name of a special information type.
2. Enter the Requirements field to open the window corresponding to this special information type.
3. In this window, enter the precise requirement of the job or position and choose OK.
4. If the requirement is essential to the job or position, check the Essential check box. This information is used in the Skills Matching Report.
5. Save the requirements.

Entering Work Choices for a Job or Position

You can enter work choices that can affect an employee's, applicant's, contractor's, or ex-employee's capacity to be deployed within your enterprise (or a customer's). Work Choices include willingness to travel, willingness to relocate, and preferred working hours and work schedule. You can enter work choices for a job or position, and compare these with the personal work choices entered for people.

You enter this information in the Work Choices window, accessed from the Job or Position window.

► **To enter work choices for a job or position:**

1. Check the relevant work requirements boxes if the job or position requires the holder to:
 - Work in all locations
 - Relocate
 - Be willing to relocate
 - Travel
 - Hold a passport
2. Enter the length of time the jobholder must perform the job or position, for example, indefinitely or two years.
3. Enter the normal working hours (for example, 9.00 to 5.30), the work schedule (the working days in the week or pattern of shifts), the proportion of full time hours required, and the minimum length of service required.
4. Check the relevant international deployment boxes if the job or position requires the jobholder to:
 - Work in all countries
 - Be willing to relocate
5. Select the countries to which the jobholder might be relocated.
6. Select the locations to which the jobholder might be relocated.
7. Enter any further job or position requirements, if required.

Viewing Position Occupancy

The Position Occupancy folder lists all those people who have held a selected position or who are applying for it, and the dates of their occupancy. This information could be relevant for selecting people with the necessary skills for similar positions.

Note: As supplied, this folder displays employees who have held the selected position or who are scheduled to hold it. Your system administrator can create a customized version of the form to display applicants who are currently applying for the position.

The supplied folder also contains a button to open the People window to see further details of an occupant. Your system administrator can change the buttons displayed on this window.

► **To view occupants of a position:**

- In the Position window, query a position and choose the Occupancy button.

Occupants are listed in reverse date order. Where a person has occupied the same position at different times, a separate record is created for each occupancy.

Viewing Further Details of Occupants or Applicants

► **To see further details of occupants or applicants:**

- Select the person's record in the Position Occupancy folder and choose the Person button.

Note: There is no restriction on the assignments you can view in the Position Occupancy folder. However, you cannot view further details if you do not have clearance to view that person's records.

Tracking the EEOG Description and NOC Code for a Job

EEOG and NOC Codes can be entered in the Further Job Information window.

Note: You can access the Further Job Information window from the Job Description window.

- **To enter the EEOG descriptions and NOC codes for a Job:**
 1. Select a description from the List of Values in the EEOG Descriptions field.
 2. Select the NOC code from the List of Values in the NOC Codes field.
 3. Save your work.

Creating a Position Hierarchy

Use the Position Hierarchy window to create position hierarchies. Always define hierarchies from the top position down.

Note: You can use the Hierarchy Diagrammer to create your position hierarchy graphically.

See: Introduction to Hierarchy Diagrams, *Using Application Data Exchange and Hierarchy Diagrammers*.

Each position can belong to any number of hierarchies at the same time, but can only appear once in any hierarchy.

You should define the primary reporting hierarchy as part of your implementation of positions. The first version of your hierarchy should show your reporting structures when you implement Oracle HR.



Suggestion: You may find it easier to define the Hierarchy using the top position and one other. Then you can add other positions into the hierarchy when you make your definitions in the Position window.

► To create a position hierarchy:

1. Enter a unique name, and check Primary if it is your main reporting hierarchy.
2. Enter the version number and start date for the hierarchy.
You can copy an existing hierarchy. See: Copying an Existing Hierarchy: page 3 – 65
3. Query the top position name into the Position block.

The Holder field displays the name of the employee who holds this position. If there is more than one holder, this field displays the number of holders. You can choose the List icon from the toolbar to display the list of holders.

4. In the Subordinates block, select the immediate subordinates for the top position.
5. To add organizations below one of these immediate subordinates, check the Down check box for the position.

The Position block now displays the position you selected. You can add subordinates to *this* position. To return to the previous level, check the Up check box.



Attention: The list of positions from which you can select in the Subordinates block includes positions that are already in the hierarchy. If you select such a position, you will move it and all its subordinates within the hierarchy.

Creating a New Version of a Position Hierarchy

► **To create a new version of an existing hierarchy:**

1. Query the name of the hierarchy.
2. In the Version field, use the Down Arrow to move through existing versions of the hierarchy until you reach a version number for which no other data appears. Enter the start date for the new version.

Note: Overlapping versions of a hierarchy cannot exist. Whenever you enter a new version of a hierarchy, the system automatically gives an end date to the existing version. Oracle HRMS retains the records of obsolete hierarchies so you do not lose any historical information.

You can copy an existing hierarchy. See: Copying an Existing Hierarchy: page 3 – 65

3. Query the top position name into the Position block.
4. In the Subordinates block, select the immediate subordinates for the top position.
5. To add positions below one of these immediate subordinates, check the Down check box for the position.

The Position block now displays the position you selected. You can add subordinates to *this* position. To return to the previous level, check the Up check box.

Copying an Existing Hierarchy

Use the Position Hierarchy window to copy an existing hierarchy.

► **To copy an existing hierarchy:**

1. Enter or query the name and number of your new hierarchy version and choose the Copy Hierarchy button.
2. Select the name and version number of the hierarchy you want to copy.

Details of this hierarchy then appear in the Position and Subordinates blocks. You can change these.

Deleting a Position Hierarchy

Use the Position Hierarchy window to delete a position hierarchy. You must check that the hierarchy is not tied in to other working areas of the system before you try to delete it.

► **To delete a position hierarchy:**

1. Remove any subordinate positions from the hierarchy, starting at the lowest level.
2. Check whether other versions of the hierarchy exist. If they do, you must delete these other versions first.
3. Check whether the position hierarchy is referenced by a security profile. If it is, you must first delete this link.
4. Query the position hierarchy in the Position Hierarchy window and choose Delete.

Changing a Position Hierarchy

Use the Position Hierarchy window to change a hierarchy. You can change position hierarchies in three different ways.

► **To add new positions to an existing hierarchy:**

1. Query the hierarchy and version you want to change.
2. Query the parent position for the one you want to add.
3. Select the new position in the Subordinates block.



Attention: The list of positions from which you can select in the Subordinates block includes positions that are already in the hierarchy. If you select such a position, you will move it and all its subordinates within the hierarchy.

► **To change the top position in an existing hierarchy:**

1. Query the hierarchy and version you want to change.
2. Query the new top position.
3. Select the previous top position in the Subordinates block.

► **To move a position and all its subordinates within a hierarchy:**

1. Query the hierarchy and version you want to change.
2. Query the new parent position for the one you want to move.
3. Select the position to move in the Subordinates block.

Running the Position Hierarchy Report

Oracle HRMS includes a standard Position Hierarchy Report to display the relationship between the positions in a hierarchy. The report also lists the current holders of each position in the hierarchy.

You run reports in the Submit Requests window.

► **To run the Position Hierarchy Report:**

1. In the Name field, select Position Hierarchy.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.

If the effective date lies between the version's start and end dates, the report shows information for the effective date. If it lies outside these dates, the report shows information for the start date of the version.

4. In the Position Structure field, select the hierarchy. If there are multiple versions, select a version.
5. In the Parent Position field, select the highest position in the hierarchy that you want to see on the report.
6. Enter Yes in the Holders Shown field to see holders' names.

If there are more than ten holders, you see the number of holders only.

7. Choose the Submit button.

Describing Your Mass Move

To describe your mass move, enter a description, determining the source and target organizations for the mass move, and specifying the date on which the mass move will take effect.

► **To describe your mass move:**

1. Navigate to the Mass Move window.
2. Enter a description of the mass move you want to perform.

You can change this description at any time before the mass move is processed.

3. Select the source and target organizations for the mass move.

The source and target organizations can differ or be the same. The lists includes organizations that have been defined for the Business Group.

Note: You cannot create a target organization "on the fly."

You can change the source and target organizations for this mass move at any time until you choose the Find button on the Find Positions window. These definitions then become part of the permanent definition of the mass move and cannot be changed.

4. If necessary, adjust the effective date of the mass move.

You can adjust the effective date at any time before the mass move is processed.

5. Save your work.

Identifying Your Source Positions

After describing your mass move, you must identify source positions to be moved.

► **To identify your source positions:**

1. In the Mass Move window, choose the Positions button.
2. In the resulting Find Positions window, select source jobs and the source positions associated with those jobs.

You can select from a list of existing jobs and positions in the source organization, or you can use generic search criteria (wildcards) to identify a pool of source jobs and source positions from which you will select your source positions in Step 3.

3. Choose the Find button.

When the Mass Move – Positions window is populated with information, the source and target organizations you defined in the Mass Move window appear in display fields.

4. If you used search criteria to identify a pool of source jobs and positions, make sure that the list includes all of the source jobs and positions you want to include in this mass move.



Attention: If you want to add source jobs or positions to this list, you must delete this mass move and define a new mass move; source jobs and positions cannot be added to this list.

5. In the Move check boxes, check each of the source positions you want to move.

Assignments associated with unchecked source positions will not be affected by the mass move in any way.

6. If you want to deactivate any source position on the effective date for the mass move, check the Deactivate Old Position check box when that position is selected.

Selected: Deactivating a source position does not delete it from the HRMS database, but enters the mass move effective date as the end date for the position.

Unselected: Leaving this check box unchecked allows assignments to be assigned to this source position after the effective date of the mass move, even though the source position may have no assignments immediately following the mass move.



Attention: Unchecking the Move check box for a record restores the original values for that record.

Identifying Your Target Positions

Now that you have identified the source positions for your mass move, you are ready to identify its target positions. For *each* of the target positions you will define, perform the following steps:

► **To identify your target positions:**

1. On the Mass Move – Positions window, select one source position for your mass move.

2. Select a target job to correspond with that source position.

The list includes existing jobs within the Business Group.

Note: You cannot create a target job "on the fly."

3. Choose Edit Field to enter a new target position, or select a target position.

The list includes existing positions in the target organization.

Note: Each source position can have only one target position. However you can use the same target position for multiple source positions.

4. Select the location and standard conditions for this target position.
5. If this target position is a new position, you can enter location and standard conditions as follows:

Source Position: Indicates that the location and standard conditions of the source position will be applied to the new target position when the mass move takes effect.

Target Organization: Indicates that the location and standard conditions of the target organization will be applied to the new target position when the mass move takes effect.

Business Group: Indicates that the location and standard conditions of the Business Group will be applied to the new target position when the mass move takes effect.



Attention: Unchecking the Move check box for a record restores the original values for that record.

6. When you have identified each of your source and target positions, choose the Assignments button.

Verifying the Transfer of Assignments for Each Source Position

The content of the Mass Move – Assignments window depends on the source position you last selected in the Mass Move – Positions window. The Mass Move – Assignments window displays that selected source position, and its corresponding source organization and source job. It also displays the target position you have entered for this selected source position, and the target organization and job associated with this target position.

All applicant and employee assignments associated with the source position you selected in the Mass Move – Positions window are also displayed.

As the Move check boxes show, by default all assignments associated with this source position are selected to move to the target position. The Mass Move – Assignments window allows you to verify these assignments and to indicate which ones, if any, will not be moving to the target position. It also enables you to change the grade, location and standard conditions for any of the assignments to be moved. North American users can also change GRE/Legal Entity conditions.

► **To verify the transfer of assignments for each source position:**

1. If you want to prevent any of these assignments from moving to the target position, uncheck the appropriate Move check boxes.
2. If you want to change the grade for any transferring assignment, select the assignment, and then select another grade for that assignment.
3. (North American users only) If you want to change the GRE/Legal Entity for any transferring assignment, select the assignment, and then select another GRE/Legal Entity for that assignment.
4. If you want to copy location and standard conditions for a transferring assignment from an entity other than the current assignment (default), select the assignment, and then select the new location and standard conditions for that assignment. Options are as follows:

Current Assignment: Indicates that the transferring assignment will maintain its current location and standard conditions when the mass move takes effect.

Source Position: Indicates that the location and standard conditions of the source position will be applied to the transferring assignment when the mass move takes effect.

Target Organization: Indicates that the location and standard conditions of the target organization will be applied to the transferring assignment when the mass move takes effect.

Business Group: Indicates that the location and standard conditions of the Business Group will be applied to the transferring assignment when the mass move takes effect.



Attention: Unchecking the Move check box for a record restores the original values for that record.

5. To save your work and then return to the Mass Move – Positions window, close the Mass Move – Assignment window.

When the Mass Move – Positions window reappears, you can repeat the above steps for any other source positions whose transferring assignments you choose to verify. Otherwise, you are ready to verify or add valid grades for any targets jobs and/or positions.

Verifying or Adding Valid Grades for Each Target Position

Because it is possible for the grade of a transferring assignment to be outside the bounds of the valid grades for the target job or target position, you can use Mass Move to add valid grades to the target position.

► **To verify or add valid grades for each target position:**

1. On the Mass Move – Positions window, choose the Valid Grades button.

The Valid Grades window displays the valid grades for the target position:

- A newly-created target position has the same valid grades as the source position.
- An existing target position retains its existing valid grades, and Mass Move adds any other grades that are valid for the source position.

You cannot delete any of the valid grades.

2. Optionally, select additional valid grades for the target position.
3. Close the Mass Move – Valid Grade window to save your work and return to the Mass Move – Positions window.

When the Mass Move – Positions window reappears, you can select any other records, to verify or add valid grades for that target position.

Executing the Mass Move

Use the Mass Move window to execute the mass move.

► **To execute the mass move:**

1. Close the Mass Move – Positions window.
2. Save your work when prompted to do so.
3. On the Mass Move window, choose the Execute button.

If the number of changes being made is large, executing the mass move may take some time.

Reviewing the Mass Move

After you have chosen the Execute button on the Mass Move window, you are ready to review the results.

► **To review the mass move:**

1. On the Mass Move window, review the contents of the Status field.

Unprocessed: Indicates that you have not yet executed the mass move.

Complete: Indicates that the mass move completed successfully without errors. For historical purposes, completed mass moves are automatically archived and cannot be modified.

Complete with Warnings: Indicates that the mass move completed successfully. Nevertheless, you should still review any warning messages the mass move generates. It is possible for a mass move to execute with Status=Complete with Warnings, yet without all assignments moving as you intended.

In Error: Indicates that the mass move did not complete successfully and that no changes took effect. You must first resolve the offending conditions before you can successfully re-execute the mass move.



Attention: If the Status field shows In Error or Complete with Warnings, the Message button appears next to the Positions button.

2. If the Message button is displayed, review the messages.

The Message window that appears includes the following fields:

Type: This displays the type of message; Warning or Error.

Row Information: If this field displays a position name, the message applies to a source position. If this field displays the name of a person, this field applies to the assignment associated with that person.

Message: This displays the text of the message.

Note: The Explain button on the Message window is disabled if no additional information is available.

3. If the Status field shows Complete or Complete with Warnings, navigate to the Mass Move – Assignments window and verify that the mass move changes you wanted to make did in fact take effect. Then navigate back to the Mass Move window.

Re-executing a Mass Move

If the Status field on the Mass Move window shows In Error, you need to resolve the problems and re-execute the mass move until the Status field shows Complete or Complete with Warnings.

If the Status field shows Complete with Warnings, you should investigate those Warnings to determine whether you want to resolve the warning conditions and re-execute the mass move to eliminate the warnings.

Note: The *mass move* feature displays warnings even when it has executed successfully.

Resolving problems may require that you exit Mass Move. For example, an applicant assignment associated with a vacancy will not move during a mass move. To move that assignment to the target position, you would need to use the Assignment window to disassociate this applicant assignment from the source position, and then assign this applicant to a target position.

► **To re-execute a mass move:**

1. Navigate to the Mass Move window.
2. Query the mass move that you previously saved and want to re-execute.
3. After the Mass Move window is populated with data, make whatever changes you need to make to correct the mass move definition.



Attention: Since assignments are datetracked, you may only update a given assignment once a day. To bypass this rule, you can alter the mass move effective date.

If you query a previously saved mass move and then choose the Positions button, the Find Positions window is not displayed. Instead, the Mass Move – Assignments window immediately appears and is populated with data.

4. Choose the Re-execute button.
5. Review your mass move in the standard manner.

Defining a Grade

If you intend loading historic assignment details into Oracle HRMS, make sure you enter valid start dates for your grades. You cannot assign an employee to a grade before the start date of the grade.



Suggestion: Consider using a fixed date as a default for your initial setup, for example, 01-JAN-1901. This will simplify your data-entry.

► **To define a grade:**

1. Enter your grades in sequence number order.

The sequence number can be any number from 1 upwards. The number indicates the rank order of the grade; 1 indicates the highest grade.

This is the sequence in which the grades appear to users in lists of values.

Consider sequencing each grade at intervals of 10 or more, to accommodate any future changes to grades.

2. Enter a unique name for the grade. If there is more than one segment in the grade name structure, a window opens when you enter the Name field. You must enter a unique *combination* of segments.
3. Enter a start date early enough to handle any historical information you want to enter.
4. Save your work.

Defining a Grade Rate

You define grade rates in the Grade Rate window.

Grade rate values are DateTracked and you must ensure you use the correct date to create your initial set of values.

If you intend loading historic grade rate details into Oracle HRMS, make sure you enter the correct start date for all your history.

► **To define grade rates:**

1. Set your effective date to a date early enough for any historical information you want to enter.
2. Enter a name for the grade rate and select the units for measuring it. Save your new rate.
3. In the Grade Rate Values block, select the grades for which you want to define rates. For each grade, enter a fixed value or a minimum, maximum and mid value.

To use this grade rate to validate salary proposals entered in the Salary Administration window, you must enter a minimum and maximum value.

To view comparatio values using this grade rate, you must enter a mid value.

Viewing Grade Comparatios

The View Employee Grade Comparatio window compares the compensation values you enter for employees with the minimum, maximum, and mid values you define for their grades.

► **To view employee grade comparatio values:**

1. Select an element and input value.

The inquiry finds assignments that have an entry for this input value.

2. Select a grade rate and grade for which you have defined a range of valid values.

The inquiry compares the minimum, maximum, and mid values for your chosen grade with the element entries of the list of assignments.

3. Choose the Find button to run the inquiry.

The folder in the lower part of the window lists the assignments that match your selection criteria:

- The *value* is the element entry value for each assignment.
- The *comparatio* shows the assignment's element entry as a percentage of the mid-value defined for the grade rate.
- The *percent of range* shows the position of the assignment's element entry between the minimum value for the grade rate (0%) and the maximum value (100%).

Part Time Employees

Employee are part time if the hours on their assignment's standard conditions are less than the work day hours entered for their organization. For part time employees, the system prorates the minimum, maximum, and mid grade rate values before calculating the comparatio and percent of range.

Defining a Pay Scale

You define a pay scale, which is a set of progression points for compensation, in the Pay Scale window.

Pay scales are used commonly in government and regulated or unionized enterprises where actual values of pay are defined as a 'pay scale', a 'schedule', or a 'spine'. Characteristics of this functionality are:

- A single scale of points and values is used to establish the actual pay for a grade group.
- Each point in the pay scale has a single value.
- Grades can have a number of distinct *steps*, with each step given a single point in the pay scale.
- An employee assignment to a grade includes a point, or step value, and the point value determines the actual pay of the employee.

You can have any number of different pay scales in Oracle HRMS. Each scale has its own set of points which may be characters or numbers.

► To define a pay scale:

1. Enter a unique name for the pay scale.
2. Enter the Increment Frequency for this pay scale. For example, if you want to increment the placement of assignments on the pay scale once each year, enter 1 in the Number field and select Year in the Per Period field.

Note: These values provide information only. You can use the Submit Requests window to set up automatic regular incrementing of grade step placements by the Increment Progression Points process.

See: Incrementing Grade Step Placements: page 3 – 86

The Automatic Increment field shows the date of the last automatic increment.

3. Save the pay scale.
4. Enter the names of the points (or steps) of the scale. The Point names can be numeric or alphanumeric. Enter them in ascending order.
5. Enter a sequence number, in ascending order, for each point. The sequence determines the progression order for the incrementing process. Then save the scale again.



Suggestion: Enter sequence numbers in multiples of 5 or 10, for example 5, 10, 15, 20. This makes it easier to enter new points afterwards between existing points in the sequence.

Defining Scale Rates

Use the Scale Rate window to define a scale rate.

Use the correct date to create your initial set of values. If you intend loading historic pay scale values into Oracle HRMS, you must use correct dates for all your history.

► **To define a scale rate:**

1. Set your effective date early enough to handle any historical information you want to enter.
2. Enter a unique name for the rate.
3. Select the units for measuring the rate, such as hours, money, or integer.
4. Select the pay scale for which you are defining the rate.
5. Save the rate.
6. In the Progression Point Values block, select the points for which you want to define rates. For each point, enter a fixed value.
7. Save the rate again.

Relating Grades to Progression Points

Use the Grade Scale window to relate grades to progression points.

A grade can have any number of steps. Steps do not always have the same interval as the pay scale points. For example, you may have a pay scale with points from 1 to 10, and a Grade which has 5 steps with points in the sequence 3, 5, 7, 8, and 9.

► **To create a grade scale:**

1. Set your effective date early enough to handle any historical information you want to enter.
2. Select a grade, and select the pay scale from which you want to choose progression points.
3. Select the highest point (or *ceiling*) to which employees on this grade can be automatically incremented by the Increment Progression Points process. Save the grade scale.

You can override this ceiling for individual employee assignments.

The step in which the ceiling occurs is automatically displayed in the Step field.

4. In the Grade Steps block, select the points you want to include on this grade scale.

When you save, the system sorts the points into ascending order by their sequence numbers (defined in the Pay Scale window).

Placing an Employee on a Grade Step

Use the Grade Step Placement window to place an employee on a grade step. When you open this window, information about the grade and scale appears automatically. By default, the ceiling point is the one you defined for the grade. However, you can enter a special ceiling point for individual employees in the Assignment window.

Note: Placing an employee on a grade step does not automatically update the salary element

► **To place an employee on a grade step:**

1. Set your effective date to the date when the placement should come into effect.
2. Select the point or step on which to place the employee assignment.
3. Check Auto-Increment to increment the employee's placement automatically when you run the Increment Progression Points Process.
4. Select a reason for manually entering a placement, if required.

You can add values to the list of valid reasons by defining values for the Lookup Type PLACEMENT_REASON.

5. Save your work.

The Progression Point Values block displays the rates you have defined for the pay scale, and the values corresponding to the selected progression point.

Incrementing Grade Step Placements

You can increment grade step placements manually, using the Grade Step Placement window, or automatically, by running the Increment Progression Points process. In each case, the actual salary element is not updated. You can use grade step placements to update salary elements but you will need to write an Oracle Payroll formula to do this. However, you are advised not to use Salary Administration to confirm a grade step change, because this will mean that subsequent changes to the point values will require updates for all the salary records to which they apply.

► **To run the Increment Progression Points process:**

1. Navigate to the Submit Requests window.
2. Select the Increment Progression Points in the Name field.
3. Enter the Parameters field to open the Parameters window.
4. Enter the name of the pay scale.
5. Enter the date on which the increment becomes effective.
6. Enter values for some or all of the segments of your People Group flexfield, if required. This restricts the assignments incremented by the process to those in the group matching the values you enter.



Attention: An assignment's grade step placement is incremented automatically only if all the following conditions are met:

- It is still below the ceiling point.
- The automatic increment check box on the Grade Step Placement window is checked for the assignment.
- There are no future changes or deletions to the assignment's grade step placement, or to the assignment itself, or to the grade scale for the assignment's grade, or to the new grade step for the assignment.

Running the Current and Projected Progression Point Values Report

Run this report before running the Increment Progression Points process, to assess its effects. This report shows what changes would be made by the Increment Progression Points process and how much it would cost for a particular scale rate, such as salary, or for all rates.

You run reports in the Submit Requests window.

► **To run the Points Values Report:**

1. Select Current and Projected Progression Points Values Report in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a Pay Scale and enter the date on which the increment would become effective.
4. Restrict the scope of the report, if required, by selecting an organization, a group and/or a rate.
5. Choose the Submit button.

Running the Employee Increment Results Report

Run this report after running the Increment Progression Points process. This report shows the results of the process.

You run reports in the Submit Requests window.

► **To run the Employee Increment Results Report:**

1. Select Employee Increment Results Report in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select a pay scale and the increment process run for which you want to see the results.
4. Restrict the scope of the report, if required, by selecting an organization, a group and/or a rate.
5. Choose the Submit button.

Entering a Collective Agreement

Use the Collective Agreements window to enter information about collective agreements used by your enterprise. Before doing this you must:

- Define the bargaining unit in the Organization window using the bargaining unit classification.
- Define the employer in the Organization window using the employer classification.

► **To enter a collective agreement:**

1. Enter the name of the collective agreement. This must be unique to allow a collective agreement to be referenced across your Business Group.
2. Enter the number of the collective agreement.
3. Enter the start date of the collective agreement and enter its jurisdiction.

Note: An end date should only be entered once the collective agreement is no longer applicable to your enterprise. After the end date the collective agreement can no longer be attached to an assignment.

4. Select the employer and bargaining unit who have negotiated the collective agreement and enter the name of the signatory for each party.
5. Enter the name of the authorizing body and the date on which the collective agreement was authorized.
6. Save your changes.

You can attach an electronic copy of any collective agreement that accompanies the record using the Attachments button.

See: *Using Attachments, Customizing, Reporting and System Administration in Oracle HRMS.*

CHAPTER

4

Payroll Definition

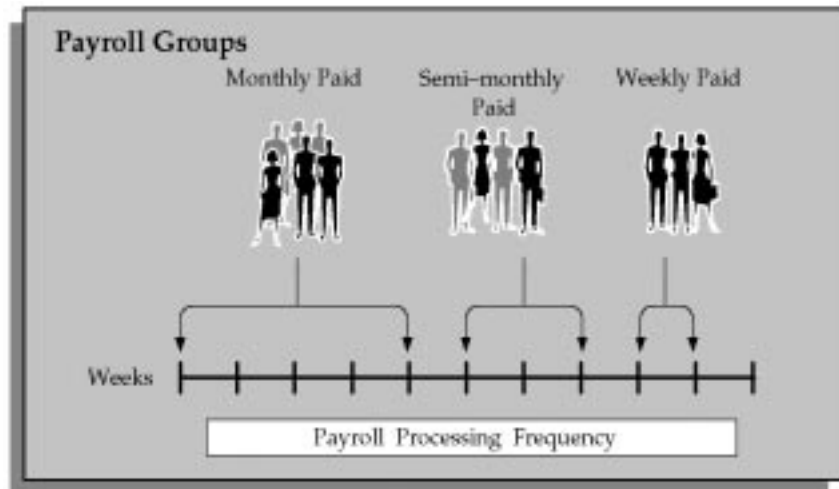
Payroll Definition

You can define your payroll to meet the needs of your enterprise.

Can Oracle Payroll handle different pay frequencies?

Yes it can. It enables you to set up different pay frequencies, for example weekly or monthly, so that you can pay different sets of employees at different intervals. Each payroll can only have a single pay frequency and you must set up at least one payroll for each pay frequency that you define.

Figure 4 – 1 Multiple payrolls in a Business Group



Do I have flexible control over payment methods?

Yes you do. You can define a payroll to include different types of payment method – for example, payment by bank transfer, payment by check and so on. When you process the payroll you can then pay the set of employees for that payroll in any of the following ways:

- All employees receive payment by a single default payment method for their payroll.
- Employees receive payment by a combination of the payment methods that you have defined for their payroll.
- Individual employees receive payment that can be distributed between the defined payment methods in proportions different from those applying to other employees belonging to the same payroll.

Can I group employees according to payroll categories in my organization?

Yes. You can assign people to any work structure such as an employment category or a particular location. You can also define a special grouping for your organization. For example, you can create a group to indicate membership of a union.

Payroll Definition Overview

A payroll is a set of employees whose pay you process with a single frequency, for example, weekly or monthly. You can define as many payrolls as you require to meet the pay policies of your enterprise. You put an employee on a payroll by making an assignment to the payroll.

You can also assign employees to other employee groups: for example, groups to indicate membership of a union or employment based sports club.

Period Types and Calendars

Since a payroll has only one pay frequency, you must define at least one payroll for each pay frequency you use. The following table shows the valid period types for pay frequency.

Payroll Period Types	Periods per Year
Year	1
Semi-Year	2
Quarter	4
Bi-Month	6
Calendar Month	12
Lunar Month	13
Semi-Month	24
Bi-Week	26
Week	52

Payment Methods for the Enterprise

Within the predefined payment method types, you can define as many payment methods as you require for your enterprise. When you create a payroll you can select which of these methods are valid for employees assigned to that payroll. You select one of these methods as the default method for the payroll.

For example, US users can select from the payment types NACHA, check and cash.

UK users can select from the payment types BACS, cheque/check and cash.

Canadian users can select from the payment types direct deposit, cheque and cash.

Employees can be paid by one or more of the valid methods for their payroll. You select the appropriate methods and enter bank account information, if required, in the Personal Payment Method window. If you do not enter any personal payment methods, the employee is paid using the default method for his or her payroll.

You can also define payment methods for third party payments, such as court-ordered wage attachments. Third party payments are always made by cheque/check, so methods for these payments must have the type Cheque (Check).

Defining a Payment Method

Define payment methods for the enterprise in the Organizational Payment Method window.

► **To define a payment method:**

1. Set your effective date to the date you want to begin using the payment method.
2. Enter a name for the payment method, and select its type.

You can create as many payment methods for each type as you require. For example, if you have different source bank accounts for different payrolls, you must create separate payment methods.

For a third party payment method, select the type Check.
3. The base currency for the Business Group appears. For some payment methods, you can select another currency.
4. To define a third party payment method, for example for a garnishment or a payments to a benefits carrier, check the Third Party Payment box.
5. Enter the Bank Details field to open the Bank Details window. Enter information about the account from which payments are coming.

Note: The Further Information field is not activated for US installations, so you cannot make entries in it.
6. Save your work.

Creating a Payroll

Use the Payroll window to create a payroll, including its calendar and valid payment methods.

► **To create a new payroll:**

1. Set your effective date to a date early enough to handle any historical information you want to enter. Your effective date must be on or before the first period start date of the payroll calendar.
2. Enter the payroll's name and select its period type from the list.
3. Enter the end date of the payroll's first period, and the number of years for which the system should initially generate the payroll's calendar. You can increase this number later to generate additional years.

When you enter the First Period End Date, make sure that the corresponding start date of the first period is after the start date of the payroll.

4. In the Date Offset region, you can change the zero default to a negative or positive number of days before or after the period end date. For example, for a semi-monthly payroll, the Cut Off date can be 3 days before the period end date (-3), while the Scheduled Run and Check dates can be 5 and 7 days after this date, respectively.
 - The Check Date, sometimes called Pay Date, is the date of constructive receipt of pay, on which paychecks become negotiable.
 - The Scheduled Run Date is the date scheduled for the Regular run of this payroll each period.
 - The Cut Off date, included for your reference, is the final date for entering or changing payroll information before a run.

These offsets are the defaults for the calendar. You can manually make date changes in the calendar, for example when an offset date falls on a weekend or holiday, by choosing the Period Dates button.

5. Select a default payment method for employees who have no valid personal payment method. You cannot select a method using magnetic tape because this requires information about employees' bank accounts.
6. Select a default consolidation set for this payroll. One consolidation set is created automatically when you define your Business Group. Oracle Payroll users can create other consolidation sets for payroll processing.

7. In the Costing region, you can enter information about the set of books and suspense account holding costing information for this payroll.

The information you enter here depends on the setup of your Cost Allocation key flexfield.

See: Setting Up the Cost Allocation Key Flexfield: page 5 – 7

8. Save your work.
9. Choose the Period Dates button to view the calendar generated for your payroll. In the Period Dates window:
 - You can view the default offset dates for every period, and you can manually override any of these dates in any record.
 - You can change the payroll's default *Open* status in any period to *Closed* to prevent further element entries. You can also reopen the period if necessary.



Attention: Use this feature with caution. When you perform certain important tasks in Oracle HRMS, the system may automatically create or delete element entries. These tasks include hiring and terminating people, and updating assignments. You cannot change any element entries that span a closed payroll period, and so you may be prevented from performing these tasks.

10. Choose the Valid Payment Methods button to add valid payment methods for this payroll.

In the Valid Payment Methods window, the default payment method for the payroll appears automatically. You can add other methods. First set your effective date to the date you want the method to become valid.

Note: An employee assigned to this payroll can have any number of personal payment methods chosen from those you enter here for the payroll.

Deleting Payrolls

You can delete a payroll if there are no active employee assignments or element links to it. However, if you have run processing for a payroll it is not advisable to delete it. If necessary, define a new payroll and simply discontinue use of the old payroll.

► **To delete a payroll:**

1. Remove any element links or employee assignments to the payroll.
2. Query the payroll in the Payroll window, choose Delete Record and Save.

CHAPTER

5

Cost Analysis

Introduction to Cost Analysis

In any human resource environment you must be able to enter the labor costs associated with your employees. Oracle HRMS gives you the power and flexibility to perform a cost analysis that best reflects the business activities of your organization.

How can you use cost analysis to support your business activities?

You can use Oracle HRMS to:

- Estimate labor costs from current compensation definitions
- Project future labor costs by modelling organizational change and salary reviews

How can you allocate labor costs across your organization?

You can allocate labor costs to particular departments, and to particular products or projects.

How flexible is the costing process?

Although you can define a default cost center for your organization, you may need to run the costing process for employees who divide their time between two or more cost centers. Oracle HRMS enables you to specify the proportion in which costs should be allocated between different cost centers within your organization.

Cost Analysis Overview

The following topics explain how the costing process is implemented in Oracle HRMS.

- Labor Costs in Oracle HRMS – the Oracle products installed in your organization determine how you can use information about the allocation of labor costs.
- The Cost Allocation Key Flexfield – entries made here determine how you can distribute costs across your organization. The default allocation of costs for your organization can be overridden so that the costing process will incorporate exceptions and temporary costing arrangements.
- Data Costed at the Payroll Level – the costing level applicable when costs are always charged to the same company or the same set of books within your organization.
- Data Costed at the Element Link Level – the costing level at which you define the costing type for earnings and deductions: costed, fixed costed, or distributed.
- Data Costed at the Organization and Assignment Level – the costing level applicable when costs are entirely or mostly allocated to the same cost center.
- Data Costed at the Element Entry Level – the costing level applicable when costs for an individual element entry, such as a timecard entry, should override costs entered at any other level.

Labor Costs in Oracle HRMS

At all installations of Oracle HR, you can allocate employee costs to cost centers, GL codes and labor distribution codes. You do this by setting up segments of the Cost Allocation Flexfield to determine the windows in which users can select cost codes.

If your installation does not include Oracle General Ledger, you must consider how to relate information on labor costs entered in Oracle Human Resources to your payroll and financial systems.

For the allocation of labor costs, all installations of Oracle HRMS use the Cost Allocation key flexfield.

The Cost Allocation Key Flexfield

When implementing and using Oracle HRMS, you make selections from the lists in the Cost Allocation flexfield segments as follows:

- When *defining a payroll*, you can select a code for the company or set of books holding the labor costs from the payroll.
- When *linking an element* representing an earnings type such as Regular Salary, a deduction such as Union Dues, or an employer charge such as a benefit plan contribution, you select a GL code that the element's results should debit or credit, and a code for the balancing GL account to credit or debit.

Note: As well as making entries to the Cost Allocation flexfield at the element link level, you also enter on each link, essential information about the *type* of costing the system should do for the link. Available types include *Costed*, *Fixed Costed*, and *Distributed*.

See: Data Costed at the Element Link Level: page 5 – 10

- When *defining an internal organization* or *entering an employee assignment*, you can select codes for the cost centers, product lines or other structures for which to collect the labor costs of the organization or assignment.

The different points at which you can make entries to segments of the Cost Allocation flexfield exist as related *entry levels*. Ranging from top to bottom, the five entry levels are these:

Entry Level	Windows	Purpose of Entry
Payroll	Payroll	Identifies company or set of books to which all costs from this payroll should go.
Link	Element Link	Identifies a GL account to debit and a balancing account to credit, or for deductions, an account to credit and a balancing account to debit. Other entries can identify any other accounts into which run results of the element should go.
Organization	Organization	Identifies structures such as cost centers against which to charge the payroll costs of employees in the organization.
Assignment	Assignment Costing	Identifies structures such as cost centers and product lines against which to regularly charge payroll costs of this assignment.
Element Entry	Element Entries Batch Lines	Identifies structures such as cost centers and product lines against which to charge payroll costs of an employee assignment for a period. Entries often taken from timecards.

Note: You enable a *qualifier* for each segment of your Cost Allocation flexfield to control whether it appears at a given entry level. For example, for the Cost Center segment of your flexfield, which receives entries only at the organization, assignment and element entry levels, you enable the Organization, Assignment and Element Entry qualifiers. This segment then appears only at these levels.

Overrides for the Cost Allocation Flexfield

A key feature of the Cost Allocation flexfield is that entries made to its segments at lower levels override any entries at higher levels. Thus, entries from timecards made in a particular segment at the Element Entry level override any entries to this segment made at the employee assignment, organization, link and payroll levels.

This helps to keep your costing information accurate. For example, if employees temporarily work at cost centers or on product lines different from those entered for their organizations or assignments, they can enter the cost center or product line codes together with their time worked on their timecards. On receipt of this costing information at the element entry level, the system correctly charges their time for the period, using this information rather than any entered at the organization or assignment levels.

Setup of the Cost Allocation Key Flexfield

You must define at least one segment of the Cost Allocation key flexfield; you may define as many as 30 segments. To set up this flexfield, consult the explanations and procedures given in the *Oracle Applications Flexfields Manual*.

You can control which segments of the Cost Allocation flexfield appear in each of the windows from which users can make entries to this flexfield.

Display of Flexfield Segments

Oracle HRMS implementors and users make selections from the lists in the Cost Allocation flexfield's segments at different levels, that is, in several different Oracle HRMS windows. However, in a particular window, they usually need to access only certain segments of the flexfield.

For example, when defining a payroll you need only the segment containing the companies or sets of books to which a payroll's labor costs should go. When defining a link for an earnings or deduction element, you may need only the segment containing the list of the costing and balancing GL codes. You are likely need the segment containing the list of cost centers only when defining an organization or employee assignment, or making an element entry.

You control the appearance of a Cost Allocation flexfield segment in a particular window by enabling *qualifiers* for the segment. When you enable a particular qualifier for a segment, this causes the segment to appear and be available for entry in a particular window, as follows:

Qualifier	Enables Segment's Appearance in
Payroll	Payroll window
Element Link	Element Link window
Organization	Organization window
Assignment	Assignment Costing window
Element Entry	Element Entries window

The following table lists the five levels, and the correct order of processing 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

Level	Qualifiers for this Level	Typical Segments Displayed at this Level
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)

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. You can enable as many qualifiers as necessary for a particular segment.

Data Costed at the Payroll Level

Sometimes the labor costs from a payroll should all be charged to a particular company within your enterprise, or all be entered in a particular set of books. In this case, you select the code for the company or set of books from the appropriate segment of the Cost Allocation flexfield when defining the payroll.

Also at the payroll level, you can select codes for *suspense accounts*. A suspense account is one that collects costs from the payroll if segment entries at lower levels are missing. For example, if an employee receives a Special Production Bonus but there is no GL code for this earnings type to debit in the Cost Allocation flexfield, the cost of the bonus goes into the suspense account.

Entries of sums in a suspense account alert you to missing codes, and provide a way to hold unallocated costs until you can make manual journal entries to the correct accounts. Since codes entered in the Cost Allocation flexfield at levels below the payroll level override any entered at the payroll level, costs go to a suspense account only when the correct account codes are not entered at the element link level.

Data Costed at the Element Link Level

You enter the important costing information for an element on its links. This means that *all elements for which you must maintain costing information must have at least one link*, even those that receive entries during the payroll run as indirect results of the processing of other elements.

When defining a link for an element, you select a *costable type* that determines whether the payroll run should collect the results of this link for costing purposes. By default, a link's costable type is *Not Costed*. For the results of elements that process in payroll runs to be collected for accumulation and transfer, you must change this default to a costable type of either *Costed*, *Fixed Costed* or *Distributed*.

Costable Type: *Costed*

When processing an element for an employee with a link marked Costed, the payroll run checks for Cost Allocation flexfield entries affecting the employee at every level – payroll, element link, organization, assignment, and element entry. Since earnings types may well receive override entries of information for labor distribution purposes at the lower levels of assignment or element entry, the costable type Costed is likely to be best for the links of elements representing earnings.

Costable Type: *Fixed Costed*

When processing elements marked for Fixed Costing, the system looks for costing information at the payroll, element link and element entry levels only, not the assignment or organization levels. 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).



Suggestion: Deduction amounts are usually irrelevant to labor distribution analyses, so elements representing deductions seldom receive lower level entries of costing information. The costable type Fixed Costing may be best for these elements' links. However, this is optional.

Costable Type: *Distributed*

For labor distribution analysis, you can distribute employer charges, such as employer payments for social security or employee benefits, as overhead costs to be added to employees' earnings. The links of

elements representing employer charges you want to distribute in this way require the costing type Distributed.

For each employee, Oracle Payroll distributes the run results of elements with this costable type proportionally over a set of earnings types you specify. This *distribution set* of earnings types could include, for example, Wages, Overtime and Shift Pay. When you select Distributed as the costable type of a link, you must also enter the name of the distribution set of earnings over which the run results of the link are to be distributed.

See: Defining an Element or Distribution Set, *Customizing, Reporting and System Administration in Oracle HRMS*.

Costing and Balancing GL Accounts

For element links whose run results should go to the General Ledger, you enter in the Costing field of the link, the GL account to debit or credit, and in the Balancing field, the account to correspondingly credit or debit.

For earnings types and non-payroll payments, the GL account to debit (for example, *Salaries*) goes in the Costing field, and the account to credit (for example, *Clearing*) goes in the Balancing field. For deductions, the account to credit (for example, *Clearing*) goes in the Costing field, and the account to debit (for example, *Union Dues Liabilities*) goes in the Balancing field.

Data Costed at the Organization and Assignment Levels

When setting up an internal organization for which most or all labor costs go to the same cost center, select that cost center from the appropriate segment of the Cost Allocation flexfield when defining the organization.

For example, if the labor costs of most of the employees in the Commercial Sales Group go against the cost center Sales, select Sales from the list of cost centers when defining the organization Commercial Sales Group. This means that by default, the system accumulates labor costs for each employee assigned to the Commercial Sales Group for the cost center Sales.

Perhaps the costs of some employees assigned to this group should exceptionally be charged to a different cost center. For these employees, you can enter the correct costing information on their assignments. Entries at the assignment level override entries at the organization level.

There may also be employees regularly assigned to work in this group only part time, who work elsewhere the rest of the time. In cases like these, it is not necessary to give employees two assignments. You can enter a number of cost centers for one assignment, specifying the percentage of labor costs to charge to each:

Proportion	Seg. 1 Cost Center
50%	Sales
50%	Public Relations

You can also enter other types of costing information at the assignment level. For example, if a Production Department employee regularly works 80% of the time on one product line and 20% on another, you can enter this on the assignment.

Proportion	Seg. 3 Labor Dist. Code
80%	H201
20%	H202

Notice that assignment level entries are datetracked, so you can enter changes ahead of time.

Data Costed at the Element Entry Level

When you make entries to elements with links marked as Costed for individual employees using the Element Entries window, or for many employees at once using the BEE windows, you can at the same time supply costing information.

Information entered at this level overrides any information entered at other levels. For example, if an employee has costing information on record in a Cost Allocation flexfield segment at the organization or assignment level, an entry of timecard information in this segment at the element entry level overrides the organization or assignment-level information.

The Oracle HRMS Cost Allocation Key Flexfield Example

To construct a simple example of a Cost Allocation flexfield, suppose that the departments of an enterprise each constitute a cost center. Suppose also that the general ledger accounts receiving labor costs are *Salaries*, *Wages*, *Overtime*, *Bonuses*, *Union Dues Liability* and *Clearing*.

The Clearing account in this example represents a single account set up for entry of:

- Credits, in order to balance debits to accounts for earnings types, for example *Salaries*, *Wages*, *Overtime* and *Bonuses*
- Debits, in order to balance credits to accounts for deductions, for example *Union Dues Liability*.

After running the Payroll and Costing processes, you can make journal entries to credit or debit each individual balancing account, making corresponding debits or credits to the Clearing account.

Information to be transferred to the General Ledger includes:

- The totals of salaries and wages paid in departments and cost centers are entered as debits to the *Salaries* and *Wages* accounts, and as balancing credits to the *Clearing* account.
- The total of bonuses paid to employees is entered as a debit to the account *Bonuses*, and as a balancing credit to the *Clearing* account.
- The total deducted from employees in Production and Quality Control to pay their union dues is entered as a credit to the *Dues Liability* account, and as a balancing debit to the *Clearing* account.

To collect information for transfer to the general ledger, this enterprise can construct a Cost Allocation flexfield with two segments, one for identifying cost centers and one for GL costing and balancing codes, as follows:

Seg. 1 Cost Center	Seg. 2 GL Code
Accounting	Salaries
Production	Wages
Public Relations	Overtime
Quality Control	Bonuses
Sales	Dues Liability
	Clearing

Now suppose that for labor distribution purposes, this enterprise accumulates labor costs not just by cost center and GL account, but also

by its product lines, represented by the labor distribution codes H201, H202, H305, H307 and H310. The enterprise requires product line costing information such as the following:

- Total wages paid to produce product line H201, and to check its quality
- Total paid for overtime to produce product line H201
- Total paid for salaries and bonuses to sell product line H201

Since this enterprise uses its GL codes for labor distribution, it does not need another segment to hold a separate list of codes. However, it must add another segment to hold product line codes, as follows:

Seg. 1 Cost Center	Seg. 2 GL Code	Seg. 3 Labor Dist. Code
Accounting	Salaries	H201
Production	Wages	H202
Public Relations	Overtime	H305
Quality Control	Bonuses	H307
Sales	Dues Liability	H310
	Clearing	

Similarly, if this enterprise needed to identify for each of its payrolls a particular company or set of books to which all the information on labor costs should go, it could define another segment of the Cost Allocation flexfield such as Company or Set of Books, to contain a list of the appropriate codes.

Note: Installations including both Oracle HRMS and Oracle General Ledger should take the GL codes for the Oracle HRMS Cost Allocation flexfield and for the Oracle General Ledger Accounting flexfield from the same table. Installations without Oracle GL can set up their own tables of GL codes, possibly populating these tables from their existing financial systems.

See: User-Defined Tables, *Customizing, Reporting and System Administration in Oracle HRMS*.

Labor Cost Allocation Example

The Sample Payroll Results table below is based on the flexfield setup described in the previous topic. It displays payroll run results for four employees, using accounts and work structures identified using the Cost Allocation key flexfield. The Example Costing Process Results table shows how the Costing process allocates these payroll results:

- to accounts and cost centers, for the general ledger
- to accounts for cost centers and product lines within cost centers, for labor distribution purposes.

Sample Payroll Results						
Employee	Work Structure		Earnings & Deductions			
	Cost Center	Product Line	Salary	Wages	Overtime	Union Dues
Employee 1	Production	H201 100%		1,000	400	20
Employee 2	Sales	H305 100%	1,500			
Employee 3	Production	H201 50%		2,000	600	30
		H202 50%				
Employee 4	Sales	H305 20%	1,000			
		H310 40%				

The table below shows the allocation of costs from the sample run results displayed above.

Example Costing Process Results							
Account Code	Cost Center		Product Line				
	Production	Sales	H201	H202	H305	H307	H310
Salaries		2,500			1,700	400	400
Wages	3,000		2,000	1,000			
Overtime	1,000		700	300			
Union Dues Liability	50						
Clearing	(Account contains balancing credits for earnings Salary, Wages and Overtime, and balancing debit for deduction Union Dues.)						

Employer Charge Distribution Example

When you give links for elements representing employer charges the costable type Distributed, the Costing process distributes the employer charges as overhead for each employee, over a set of employees' earnings.

See: Data Costed at the Element Link Level: page 5 – 10

This example shows how employer payments totalling \$100 are distributed over a set of earnings including wages and overtime, for the cost center Production and the product lines H201 and H202.

Overhead Distribution for the Production Cost Center

Total paid to Production Cost Center as Wages run result:

\$3,000.00

Total paid to Production Cost Center as Overtime run result:

\$1,000.00

Total for Earnings types specified for distribution: \$4,000.00

Ratio for Wages distribution, Production Cost Center = $3000/4000 = .75$

Wages overhead = Pension Charge \$100 x .75 = \$75.00

Ratio for Overtime distribution, Production Cost Center = $1000/4000 = .25$

Overtime overhead = Pension Charge \$100 x .25 = \$25.00

Overhead Distribution for Product Lines H210 and H202

Total paid for Product Line H201 as Wages run result: \$2,000.00

Total paid for Product Line H202 as Wages run result: \$1,000.00

Total paid for Product Lines 201 and 202 for Wages: \$3,000.00

Ratio for Wages distribution, Product Line H201 = $2000/3000 = 0.6667$

Product Line H201 overhead = Total Wages overhead \$75 x .6667 = \$50.00

Ratio for Wages distribution, Product Line H202 = $1000/3000 = .3334$

Product Line H202 overhead = Total Wages overhead \$75 x .3334 = \$25.00

Total paid for Product Line H201 as Overtime run result: \$700.00

Total paid for Product Line H202 as Overtime run result: \$300.00

Total paid for Product Lines H201 and H202 as Overtime: \$1,000.00

Ratio for Overhead distribution, Product Line H201 = $700/1000 = .7$
 Product Line H201 overhead = Total Overtime overhead \$25 x .7 = \$17.50
 Ratio for Overhead distribution, Product Line H202 = $300/1000 = .3$
 Product Line H202 overhead = Total Overtime overhead \$25 x .3 = \$7.50

Distribution of Overhead Over Cost Center and Product Line Totals			
Account Code	Cost Center	Product Line	
	Production	H201	H202
Wages	3,000	2,000	1,000
Employer Liability Distribution	75	50	25
Overtime	1,000	700	200
Employer Liability Distribution	25	17.50	7.50

Running the Costing Process

The Costing process generates journal entries for your ledgers and costing information relating to labor costs. You can enter start and end dates of the period over which you want to cost payroll runs in order to cost all your runs in one process. Alternatively, you may want to produce a costing run for each payroll run.

You run the Costing process from the Submit Requests window. You should run Costing before the Transfer to GL process.

► **To run the Costing process:**

1. In the Name field, select Costing.
2. In the Parameters window, select the name of the payroll or consolidation set to run the process for. When you select a payroll, its default consolidation set displays.
3. Enter the start and end dates of the time span for the Costing process to cover.
4. Choose the Submit button.

Running the Cost Breakdown Report

There are two versions of the Cost Breakdown report:

- The Cost Breakdown Report for Costing Run shows summarized costing totals for a specified costing process.
- The Cost Breakdown Report for Date Range shows summarized costing totals for a particular consolidation set or payroll over a specified interval.

Both versions show the distribution of payroll calculation results plus corresponding General Ledger and labor cost details.

You run both versions in the Submit Requests window.

► **To run the Report for a Costing Run:**

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.
2. Enter the costing process for which you want to generate the report. Additionally, if your legislation allows costing by reporting entities, you can specify whether this costing run should apply to all reporting entities, or to a single reporting entity that you select in the reporting entity field.
3. Choose the Submit button.

► **To run the Report for a Date Range:**

1. In the Name field, select the report name. Then enter the Parameters field to open the Parameters window.
2. Enter the start and end dates for which you want to generate the report.
3. Select the name of either the payroll or the consolidation set for which you want to see information. Additionally, if your legislation allows costing by reporting entities, you can specify whether this costing run should apply to all reporting entities, or to a single reporting entity that you select in the reporting entity field.
4. Choose the Submit button

Running the Transfer to GL Process

If your installation includes Oracle General Ledger, you can run the Transfer to GL process. This transfers the results of the Costing process for a payroll to the Accounting flexfield of Oracle General Ledger.

You run the Transfer to GL process from the Submit Requests window.

► **To run the Transfer to GL process:**

1. In the Name field, select Transfer to GL.
2. In the Parameters window, select the payroll or consolidation set for which you are running the process. When you select a payroll, its default consolidation set displays.
3. Enter the start and end dates of the period for which you want to transfer Costing process results.
4. Choose the Submit button.

APPENDIX

A

Windows and Reports

This appendix includes information about:

- Windows and their navigation paths
- Reports and process in Oracle HRMS

Windows and their Navigation Paths

The following list shows the default navigation paths for all the windows in Oracle HRMS for Canada, as they are supplied. You can use taskflow windows directly from the menu, or from the People and Assignment windows.

The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus and task flows for your responsibility. They may also create customized versions of some of these windows using different window titles.

Absence Detail

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Others button and select Absence.

Or:

1. Choose Fastpath -> Absence in the Navigator.
2. In the resulting Find window, query the person.

Absence Attendance Type

- Choose Total Compensation -> Basic -> Absence Types in the Navigator.

Accrual Bands

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.
3. Choose the Accrual Bands button.

Accrual Plans

- Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.

Accruals

Do one of the following:

1. Choose View -> Employee Accruals in the Navigator.
2. Run a query in the Assignments Folder window.

3. Select an employee assignment and choose the Accruals button.

Or:

1. Choose Fastpath -> Accruals in the Navigator.
2. In the resulting Find window, query the person.

Action Types

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Actions button.

Activity Rate

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.

Activity Variable Rates and Rules

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Variable Rates button.

Actual Premiums

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Actual Premiums in the Navigator.

Address

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Address button.

Or:

1. Choose Fastpath -> Address in the Navigator.
2. In the resulting Find window, query the person.

Advanced Criteria

1. Choose Benefits Extract -> Criteria Definition in the Navigator.
2. Query or enter a criteria definition and choose the Advanced tab.
3. Select a Criteria Type and choose the Details button.

Additional Absence Detail Information <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Select Absence.

Or:

1. Choose People -> Fastpath -> Absence Information in the Navigator.
2. In the resulting Find window, query an employee.

Alter Effective Date

- Choose Tools -> Alter Effective Date from the Tools menu.

Applicant Entry

- Choose Recruitment -> Applicant Quick Entry in the Navigator.

Applicant Interview

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.
4. Choose the Interview button.

Application

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.

Or:

1. Choose Fastpath -> Application in the Navigator.
2. In the resulting Find window, query the person.

Application Utilities Lookups

1. Choose Other Definitions -> Lookup Tables in the Navigator.
2. Enter or query a user-defined Type.

Appraisal Template

- Choose Career Management -> Appraisal Template in the Navigator.

Assessment Template

- Choose Career Management -> Assessment Template in the Navigator.

Assign Security Profiles

- Choose Security -> Assign Security Profiles in the Navigator.

Assignment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.

Or:

1. Choose Fastpath -> Assignment in the Navigator.
2. In the resulting Find window, query the person.

Assignment Budget Values

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant or an employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Budgets button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Budget Values.

Or:

1. Choose Fastpath -> Assignment Budget in the Navigator.
2. In the resulting Find window, query the person.

Assignment Criteria

1. Choose Payroll -> Assignment Set in the Navigator.
2. Enter or query an assignment set.
3. Choose the Criteria button.

Assignment History

- Choose View -> Histories -> Employee Assignment in the Navigator.

Assignment Processes

1. Choose View -> Payroll Process Results in the Navigator.
2. Enter or query a payroll process.
3. Choose the Assignment Process button.

Assignment Set

- Choose Payroll -> Assignment Set in the Navigator.

Assignment Statuses

- Choose Work Structures -> Status in the Navigator.

Assignment Folder

- Choose View -> Lists -> Assignment Folder in the Navigator.

Authentication Activities (Advanced Benefits Only)

- Choose Total Compensation -> General Definitions -> Authentication Activities in the Navigator.

Batch Header

- Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

Batch Process Parameters (Advanced Benefits only)

- Choose Processes and Reports -> Batch Process Parameters in the Navigator.

Batch Summary

- Choose Mass Information eXchange: MIX -> BEE Summary in the Navigator.

Beneficiaries

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a beneficiary.
6. Choose the Others button and select Beneficiary.

Beneficiary Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the Designations tab.
4. Choose the Beneficiary tab.
5. Choose the Certifications button.

Benefits Authentication Form (Advanced Benefits only)

- Choose People -> Total Comp Contribution -> Benefits Authentication Form in the Navigator.

Benefits Balances

- Choose Total Compensation -> General Definitions -> Additional Setup -> Benefits Balances in the Navigator.

Benefit Contributions

- Choose Total Compensation -> Basic -> Benefit Contributions in the Navigator.

Benefits Group

- Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Benefits Group in the Navigator.

Benefits Pools (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Benefits Pools in the Navigator.

Benefits Service Center (Advanced Benefits Only)

- Choose People -> Benefits Service Center in the Navigator.

Benefits Authentication Form (Advanced Benefits only)

- Choose People -> Total Comp Contribution -> Benefits Authentication Form in the Navigator.

Book Events

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Bookings.

Budget

- Choose Work Structures -> Budget in the Navigator.

Budget Value Defaults

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Budget Value Defaults.

Budgetary Calendar

- Choose Work Structures -> Budget Calendar in the Navigator.

Business Group Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Business Group Information.

Career Path Names

- Choose Work Structures -> Job -> Path Name in the Navigator.

Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Certifications button.

Change Event Log

1. Choose Benefits Extract -> Change Event Log in the Navigator.

Cities

- Choose Other Definitions -> Cities in the Navigator.

Collective Agreements

- Choose Work Structures -> Collective Agreements in the Navigator.

Columns

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Columns button.

Communication Delivery Methods

- Choose Fastpath -> Personal Delivery Method in the Navigator.

Communication Types (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.

CommunicationType Children

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query a communication type kit.
3. Choose the View Children button.

Communication Type Delivery Methods

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Delivery button.

Communication Type Triggers

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Triggers button.

Communication Type Usages

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Usages button.

Competence Profile

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Competence Profile.

Competence Requirements

- Choose Career Management -> Competence Requirements in the Navigator.

Competence Types

- Choose Career Management -> Competence Types in the Navigator.

Competencies

- Choose Career Management -> Competencies in the Navigator.

Consolidation Sets (Payroll only)

- Choose Payroll -> Consolidation in the Navigator.

Contacts

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.

Or:

1. Choose Fastpath -> Contact in the Navigator.
2. In the resulting Find window, query the person.

Contract

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button.
4. Choose Contracts.

Or:

1. Choose Fastpath -> Contracts in the Navigator.
2. In the resulting Find window, query the person.

Contribution History (Def Comp 457)

- Choose View -> Histories -> Entries -> Contribution History

Control Totals

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Choose the Totals button.

Conversion Rate Types

- Choose Payroll -> Currency Types in the Navigator.

Costing

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Assignment button.
4. Choose the Others button and select Costing.

Or:

1. Choose Fastpath -> Costing in the Navigator.
2. In the resulting Find window, query the person.

Costing Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Costing.

County Tax Rules <Employee>

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.

Court Orders

- Choose People -> Total Comp Enrollment -> Court Orders in the Navigator.

Coverage Across Plan Types

- Choose Total Compensation -> Rates/Coverage Definitions -> Coverage Across Plan Types in the Navigator.

Coverage Calculations

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Coverage Calculations in the Navigator.

Covered Dependents

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.

3. Choose the Others button and select Contact.
4. Chose the Entries button.
5. Select the element representing the benefit for which you are entering a dependent.
6. Choose the Others button and select Dependents.

Criteria Definition

- Choose Benefits Extract -> Criteria Definition in the Navigator.

Custom Reports

- Choose Processes and Reports -> Submit Custom Reports in the Navigator.

Database Items

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Show Items button.

DateTrack History Change Field Summary

- Choose Tools -> DateTrack History from the Tools menu.

Deduction (Payroll only)

- Choose Total Compensation -> Basic -> Deductions in the Navigator.

Define Combinations

- Choose Total Compensation -> Programs and Plans -> Combinations in the Navigator.

Define Extract

- Choose Benefits Extract -> Extract Definition in the Navigator.

Define Function

- Choose Other Definitions -> Formula Functions in the Navigator.

Define QuickPaint Report

- Choose Processes and Reports -> Define a QuickPaint Report in the Navigator.

Define Task Flow

- Choose Security -> Task Flow Definitions in the Navigator.

Define Task Flow Nodes

- Choose Security -> Task Flow Nodes in the Navigator.

Delete Person

- Choose People -> Delete Personal Records in the Navigator.

Dependent/Beneficiary Designation (Advanced Benefits Only)

- Choose People -> Total Comp Enrollment -> Dependent/Beneficiary Designation in the Navigator.

Dependent Certifications

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program.
3. Choose the Dependent Coverage tabbed region
4. Choose the Certifications button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the Designations tab.
4. Choose the Dependent tab.
5. Choose the Certifications button.

Dependent Change of Life Event

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.

Dependent Change of Life Event Certification

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.
4. Select a life event and choose the Dependent Change of Life Event Certifications button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.
5. Select a life event and choose the Dependent Change of Life Event Certifications button.

Dependent Coverage Eligibility Profiles

- Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Dependent Coverage in the Navigator.

Dependent Eligibility Profiles

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.

3. Choose the Eligibility Profiles button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Eligibility Profiles button.

Derived Factors

- Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Derived Factors in the Navigator.

Designation Requirements

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Options in the Navigator.
2. Query or enter an option.
3. Choose the Designation Requirements button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Designations button.

Earnings (Payroll only)

- Choose Total Compensation -> Basic -> Earnings in the Navigator.

Edit Formula

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Edit button.

Electable Choices

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button
3. Choose the Electable Choices button.

Element

- Choose Total Compensation -> Basic -> Element Description in the Navigator.

Element and Distribution Set

- Choose Payroll -> Element Set in the Navigator.

Element Classifications (Payroll only)

- Choose Total Compensation -> Basic -> Classification in the Navigator.

Element Entries

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.

Or:

1. Choose Fastpath -> Entries in the Navigator.
2. In the resulting Find window, query the person.

Element Link

- Choose Total Compensation -> Basic -> Link in the Navigator.

Eligibility

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.
4. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.
5. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plans and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Participation Eligibility button.
6. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.
4. Choose the Eligibility button.

Employee Assignment Processes

- Choose View -> Assignment Process Results in the Navigator.

Employee Review

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reviews.

Or:

1. Choose Fastpath -> Employee Review in the Navigator.

2. In the resulting Find window, query the person.

Employer Identification

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Employer Identification

Employment Equity Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the Field with the entry Business Group.
6. Choose the Others button.
7. Select Employment Equity Information and click OK.
8. Double-click in the FlexField to display the window.

End Application

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath -> End Application in the Navigator.
2. In the resulting Find window, query the person.

End Employment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

Or:

1. Choose Fastpath -> End Employment in the Navigator.

2. In the resulting Find window, query the person.

Enrollment Action (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Additional Setup -> Enrollment Action in the Navigator.

Enrollment Opportunities

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.

Enrollment Override

- Choose People -> Total Comp Enrollment -> Enrollment Override in the Navigator.

Enrollment Rules

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Timing tab.
4. Choose the Scheduled tab or the Life Event tab.
5. Choose the Enrollment Rules button.

Entry Values

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.
5. Select an entry and choose the Entry Values button.

Event Bookings

Do one of the following:

- Choose People -> Events and Bookings in the Navigator.

Or:

1. Choose Fastpath -> Event in the Navigator.
2. In the resulting Find window, query the person.

Extract Definition

- Choose Mass Information Exchange -> System Extract -> Extract Definition in the Navigator.

Extract Results

- Choose Benefits Extract -> Extract Results in the Navigator.

Extract Results Errors

1. Choose Benefits Extract -> Extract Results in the Navigator.

Extract Results Detail

1. Choose Benefits Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Details button.

Extract Results Header and Trailer

1. Choose Benefits Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Header and Trailer button.
3. Query an extract run result and choose the Errors and Warnings button.

File Layout Advanced Conditions

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Advanced Conditions button.

Flex Credits (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Flex Credits in the Navigator.

Flex Program (Advanced Benefits only)

- Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.

Form Customization

- Choose Security -> CustomForm in the Navigator.

Formula

- Choose Total Compensation -> Basic -> Write Formulas in the Navigator.

Frequency Rules

1. Choose Total Compensation -> Basic -> Deductions in the Navigator.
2. Enter or query a deduction.
3. Choose the Frequency Rules button.

Globals

- Choose Total Compensation -> Basic -> Global Values in the Navigator.

GL Daily Rates

- Choose Total Compensation -> Basic -> Global Values in the Navigator.

Goods and Services

- Choose Total Compensation -> General Definitions -> Additional Setup -> Goods and Services in the Navigator.

Grade Rate

- Choose Work Structures -> Grade -> Grade Rate in the Navigator.

Grade Scale

- Choose Work Structures -> Grade -> Grade Steps and Points in the Navigator.

Grade Step Placement

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Grade Step.

Or:

1. Choose Fastpath -> Grade Step in the Navigator.

2. In the resulting Find window, query the person.

Grades

- Choose Work Structures -> Grade -> Description in the Navigator.

GREs and other information <Employee>

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Select the GREs and other information region.

Federal Tax Information <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Federal Tax Information region (if not already selected).

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
 2. In the resulting Find window, query an employee.
 3. Select the Federal Tax Information region.
- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Imputed Income in the Navigator.

Information Type Security

- Choose Security -> Information Types Security in the Navigator.

Input Values

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

Investment Options

1. Choose People -> Total Comp Enrollment -> Savings Plan in the Navigator.
2. Query a person.
3. Choose the Investment Options button.

Job

- Choose Work Structures -> Job -> Description in the Navigator.

Job Evaluation

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.
3. Choose the Evaluation button.

Job Requirements

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.
3. Choose the Requirements button.

Layout Definition

- Choose Benefits Extract -> Layout Definition in the Navigator.

Life Event

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Life Event button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Life Event button.

Life Event Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Life Event Certifications button.

Life Event Reason Impact on Eligibility (Advanced Benefits)

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Life Event Eligibility button.

Life Event Reasons (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.

Limit Rules (Payroll only)

- Choose View -> Wage Attachments -> Limit Rules in the Navigator.

Link Input Values

1. Choose Total Compensation -> Basic -> Link in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

List Assignments

- Choose View -> Lists -> Assignments in the Navigator.

List Budget Variance by Organization

- Choose View -> Organization Budgets in the Navigator.

List Employees by Absence Type

- Choose View -> Lists -> Employees by Absence Type in the Navigator.

List Employees by Element

- Choose View -> Lists -> Employees by Element in the Navigator.

List Employees by Organization

- Choose View -> Lists -> Employees by Organization in the Navigator.

List Employees by Position

- Choose View -> Lists -> Employees by Position in the Navigator.

List Employees by Position Hierarchy

- Choose View -> Lists -> Emps by Position Hierarchy in the Navigator.

List People by Assignment

- Choose View -> Lists -> People by Assignment in the Navigator.

List People by Special Information

- Choose View -> Lists -> People by Special Information in the Navigator.

List Position Budget Variance

- Choose View -> Position Budgets in the Navigator.

Location

- Choose Work Structures -> Location in the Navigator.

Lookups

- Choose Other Definitions -> Lookup Tables in the Navigator.

Maintain On Line Activities (Advanced Benefits)

- Choose Total Compensation -> General Definitions -> On-line Activities for Authentication in the Navigator.

Maintain Options Eligibility

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.

4. Choose the Option Eligibility button.

Maintain Plan Eligibility

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.

Maintain Plan Options

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.

Maintain Plan Related Details

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Details button.

Maintain Pop Up Messages (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Define Messages in the Navigator.

Map Career Path

- Choose Work Structures -> Job -> Career Path in the Navigator.

Map Salary Survey

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Complete the Position window and save your work.
3. Choose the Define Survey Map button.

Or:

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Complete the Job window and save your work.
3. Choose the Define Salary Map button.

Mass Move

- Choose Work Structures -> Position -> Mass Move in the Navigator.

Mass Move – Assignments

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move – Positions window.
7. Choose the Assignments button.

Mass Move – Messages

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window and choose the Find button.
5. Complete the Mass Move – Positions window and choose the Assignments button.
6. Complete the Mass Move – Assignments window and close it.
7. From the Mass Move – Positions window, choose the Valid Grades button.
8. Complete the Valid Grades window and close it.
9. Close the Mass Move – Positions window.
10. From the Mass Move window, choose the Execute button.
11. If the Status field shows In Error or Complete with Warnings, a Message button appears.
12. If the Message button appears, choose it to view messages in the Mass Move – Messages window.

Note: Alternatively, you can view messages for saved (but not yet successfully executed) mass moves as follows:

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Enter the name of the saved mass move in the Description field.

3. When the Mass Move window is populated with data and the Message button appears, choose the Message button .

Mass Move – Positions

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window.
3. Save your work.
4. Choose the Positions button.
5. In the resulting Find Positions window, select or enter a Source Job and Source Position.
6. Choose the Find button.

Mass Move – Valid Grades

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move – Positions window.
7. Choose the Valid Grades button.

Mass Update of Applicants

- Choose Recruitment -> Mass Update of Applicants in the Navigator.

Messages

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Choose the Messages button.

Message Configuration (Advanced Benefits only)

- Choose Total Compensation -> General Definitions -> Message Configuration in the Navigator.

Miscellaneous Plan

- Choose People -> Total Comp Enrollment -> Miscellaneous Plan in the Navigator.

MIX Batch Header

- Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

Monitor Batch Processes (Advanced Benefits only)

- Choose Processes and Reports -> Monitor Batch Processes in the Navigator.

Monthly Participant Premium

- Choose People -> Enrollment Process -> Monthly Participant Premium in the Navigator.

Monthly Plan or Option Premium

- Choose Total Compensation -> Monthly Premium in the Navigator.
1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
 2. Enter or query an accrual plan name.
 3. Choose the Net Calculation Rules button.

New Hire Reporting

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a GRE.
3. Choose the Others button.
4. Select New Hire Reporting

Non-Flex Program

- Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.
5. Click in the Additional Organization Information field.

Options

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Options in the Navigator.

Organization

- Choose Work Structures -> Organization -> Description in the Navigator.

Organization Hierarchy

- Choose Work Structures -> Organization -> Hierarchy in the Navigator.

Organizational Payment Method

- Choose Payroll -> Payment Methods in the Navigator.

Other Rates

1. Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.
2. Query a person.
3. Choose the Others button and select Other Rates.

Parent Organization

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Parent Organization.

Participant

- Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participant in the Navigator.

Participation Eligibility Profiles

- Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participation Eligibility Profiles

Participation Overrides (Advanced Benefits only)

- Choose People -> Total Comp Participation -> Participation Overrides in the Navigator.

Payment Schedule

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query or enter a flex credit definition and choose the Processing tabbed region.
3. Choose the Payment Schedule button.

Payments

1. Choose People -> Total Comp Contribution -> Record Contribution or Distribution
2. Choose the View Payments window.

Pay Scale

- Choose Work Structures -> Grade -> Pay Scale in the Navigator.

Payroll

- Choose Payroll -> Description in the Navigator.

Payroll Processes (Payroll only)

People

- Choose People -> Enter and Maintain in the Navigator.

People Folder

- Choose View -> Lists -> People Folder in the Navigator.
1. Choose People -> Enter and Maintain in the Navigator.
 2. Enter or query an employee, and choose the Assignment button.
 3. Choose the Tax Information button.
 4. Choose the Percentage button.

Performance

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Salary button.
4. Choose the Performance button.

Or:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Others button and select Performance.

Period Dates

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.

3. Choose the Period Dates button.

Period-to-Date Limits

Do one of the following:

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Period-to-Date Limits in the Navigator.

Or:

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.
4. Choose the Period to Date Limit button.

Period Types

- Choose Other Definitions -> Time Periods in the Navigator.

Person Benefits Assignment

- Choose People -> Total Comp Participation -> Person Benefits Assignment

Person Benefits Balances

- Choose People -> Total Comp Participation -> Person Benefits Balances in the Navigator.

Person Changes (Advanced Benefits only)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.
4. Choose the Add Person Change button.

Person Changes Cause Life Events (Advanced Benefits only)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.

Person Communications (Advanced Benefits only)

- Choose People -> Enrollment Process -> Person Communications in the Navigator.

Person Enrollment Action Items (Advanced Benefits only)

- Choose People -> Enrollment Process -> Person Enrollment Action Items in the Navigator.

Person Enrollment Certificates (Advanced Benefits only)

- Choose People -> Enrollment Process -> Person Enrollment Certificates in the Navigator.

Person Primary Care Provider

- Choose People -> Total Comp Enrollment -> Person Primary Care Provider in the Navigator.

Person Types

- Choose Other Definitions -> Person Types in the Navigator.

Person Type Usage

- Choose Fastpath -> Person Type Usage in the Navigator.

Personal Payment Method

Personal Payment Method <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button.
5. Select Pay Method.

Or:

1. Choose People -> Fastpath -> Pay Method in the Navigator.
2. Query an employee.
3. Enter Personal Payment Method Details.

Phone Numbers

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Phones.

Or:

1. Choose Fastpath -> Phones in the Navigator.
2. In the resulting Find window, query the person.

Picture

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator
2. Enter or query a person.
3. Choose the Picture button.

Or:

1. Choose Fastpath -> Picture in the Navigator.
2. In the resulting Find window, query the person.

Plan and Plan Type

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.

Plan Enrollment Requirements

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a program.
 3. Choose the Plan and Plan Types button.

Plan in Program Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.

4. Choose the Plans tab.
5. Choose the Participation Eligibility button.

Plan Reimbursement

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Plan Reimbursement in the Navigator.

Plans

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Plans in the Navigator.

Plan Type Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Type tab.
5. Choose the Participation Eligibility button.

Plan Types

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Plan Types in the Navigator.

Position

- Choose Work Structures -> Position -> Description in the Navigator.

Position Evaluation

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Evaluation button.

Position Hierarchy

- Choose Work Structures -> Position -> Hierarchy in the Navigator.

Position Occupancy Folder

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Query a position.
3. Choose the Occupancy button.

Position Reporting To

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Reporting To button.

Position Requirements

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Requirements button.

Possible Certifications

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.
3. Choose the Electable Choices button
4. Choose the Possible Certifications button

Postal/Zip

- Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Postal/Zip in the Navigator.

Primary Care Providers

Do one of the following:

- Choose People -> Total Comp Enrollment -> Person Primary Care Provider

Or:

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.
2. Query a person.

3. Choose the Care Providers button.

Program/Plan Years

- Choose Total Compensation -> General Definitions -> Additional Setup -> Program/Plan Years in the Navigator.

Programs

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Programs in the Navigator.

Program Enrollment Requirements

- Choose Total Compensation -> General Definitions -> Programs and Plans -> Program Enrollment Requirements in the Navigator.

Program Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.

Program Waive Certifications

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.
6. Choose the Waive Certification button.

Program Waive Reasons

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.

Provincial Employment Standard

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the field with the entry Business Group.
6. Choose the Others button.
7. Select Provincial Employment Standard and click OK.
8. Double-click in the FlexField to display the window.

Provincial Reporting Info.

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select GRE/Legal Entity from the List of Values.
5. Position the cursor in the field with the entry GRE/Legal Entity.
6. Choose the Others button.
7. Select Provincial Reporting Info and click OK.
8. Double-click in the FlexField to display the window.

Provincial Tax Information <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Provincial Tax Information region.

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.

3. Select the Provincial Tax Information region.

Qualifications

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Qualifications.

Qualification Types

- Choose Career Management -> Qualification Types in the Navigator.

Quebec Tax Information <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Quebec Tax Information region.

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.
3. Select the Quebec Tax Information region.

QuickPaint Inquiry

1. Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.
2. Query a report that has been run.
3. Choose the View Report button.

Rating Scales

- Choose Career Management -> Rating Scales in the Navigator.

Record Continuing Benefits Payments

- Choose People -> Total Comp Contribution -> Record Continuing Benefits Payments in the Navigator.

Record Layout Advanced Conditions

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Advanced Conditions button.

Recruiting For

1. Choose Recruitment -> Recruitment Activity in the Navigator.
2. Enter or query a recruitment activity.
3. Choose the Recruiting For button.

Recruitment Activity

- Choose Recruitment -> Recruitment Activity in the Navigator.

Regulations

- Choose Total Compensation -> General Definitions -> Additional Setup -> Regulations in the Navigator.

Regulatory Bodies and Regulations

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.
2. Query or enter a reporting group.
3. Choose the Plan Regulatory Bodies and Regulations button.

Reimbursements Requests (Advanced Benefits only)

- Choose People -> Total Comp Distribution -> Reimbursements Requests in the Navigator.

Related Person Changes (Advanced Benefits only)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.
4. Choose the Add Related Person Change button.

Related Person Changes Cause Life Events (Advanced Benefits only)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.

2. Query or enter a life event.
3. Choose the Related Person Changes button.
1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Categories.

Reporting Groups

- Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.

Reporting Statuses

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Statuses.

Request Letter

- Choose Recruitment -> Request Recruitment Letter in the Navigator.

Request Set

- Choose Security -> Report Sets in the Navigator.

Requisition and Vacancy

- Choose Recruitment -> Requisition and Vacancy in the Navigator.

Rows

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Rows button.

Run QuickPaint Report

- Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.

Salary Administration

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Salary button.

Or:

1. Choose Fastpath -> Salary in the Navigator.
2. In the resulting Find window, query the person.

Salary Basis

- Choose Total Compensation -> Basic -> Salary Basis in the Navigator.

Salary History

Do one of the following:

1. Choose View -> Histories -> Salary in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Salary History button.

Or:

1. Choose Fastpath -> Salary History in the Navigator.
2. In the resulting Find window, query the person.

Salary Management Folder

- Choose People -> Salary Management in the Navigator.

Salary Surveys

- Choose Total Compensation -> Basic -> Salary Survey in the Navigator.

Savings Plan

- Choose People -> Total Comp Enrollment -> Savings Plan in the Navigator.

Scale Rate

- Choose Work Structures -> Grade -> Point Values in the Navigator.

Schools and Colleges

- Choose Career Management → Schools and Colleges in the Navigator.

Schools and Colleges Attended

1. Choose People → Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Schools/Colleges.

Secondary Statuses

Do one of the following:

1. Choose People → Enter and Maintain in the Navigator.
2. Enter or query an applicant or employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Secondary Status button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Secondary Status.

Or:

1. Choose Fastpath → Secondary Status in the Navigator.
2. In the resulting Find window, query the person.

Security Profile

- Choose Security → Profile in the Navigator.

Service Areas

- Choose Total Compensation → General Definitions → Eligibility/Rate Factors → Service Areas in the Navigator.

Sort

1. Choose Benefits Extract → Layout Definition in the Navigator.
2. Choose the File Layout tab and select a Record Name.
3. Choose the Sort button.

Special Information

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Special Info button.

Or:

1. Choose Fastpath -> Special Information in the Navigator.
2. In the resulting Find window, query the person.

Special Rates

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Special Rates button.

Special Information Types

- Choose Other Definitions -> Special Information Types in the Navigator.

Standard Rates

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Standard Rates in the Navigator.

Standard Holiday Absences <Employee>

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Select Standard Holiday Absences.

Or:

1. Choose People -> Fastpath -> Statutory Holidays in the Navigator.
2. In the resulting Find window, query an employee.

Submit a New Request

1. Choose Processes and Reports -> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

Table Structure

- Choose Other Definitions -> Table Structure in the Navigator.

Table Values

- Choose Other Definitions -> Table Values in the Navigator.

User Types and Statuses

- Choose Other Definitions -> User Types and Statuses

Valid Grades (for jobs)

1. Choose Work Structures in the Navigator.
2. Choose either Job -> Description or Position -> Description.
3. Enter or query a job or position.
4. Choose the Valid Grades button.

Valid Payment Methods

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.
3. Choose the Valid Payment Methods button.

Variable Rate Profiles

- Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Variable Rate Profiles in the Navigator.

View Absence History

- Choose View -> Histories -> Absence in the Navigator.

View Earnings and Deductions Balances

Do one of the following:

1. Choose View -> Employee Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Employee Balances in the Navigator.
2. In the resulting Find window, query the person.

View Element Entry History for Employee

1. Choose View -> Histories -> Entries in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Entry History button.

View Employee Dental, Medical and Vision Benefits

1. Choose View -> Employee Benefits in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the View Benefits button.

View Employee Grade Comparatio

- Choose View -> Grade Comparatio in the Navigator.

View Enrollment Results

- Choose People -> Total Comp Enrollment -> View Enrollment Results in the Navigator.

View Participation Information (Advanced Benefits only)

- Choose People -> Total Comp Participation -> View Participation Information in the Navigator.

View Program Structure

- Choose Total Compensation -> Programs and Plans -> View Program Structure in the Navigator.

View Tax Balances

Do one of the following:

1. Choose View -> Tax Information -> Tax Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Tax Balances in the Navigator.
2. In the resulting Find window, query the person.

View Vacancies

- Choose View -> Vacancies in the Navigator.

Waive Participation (Advanced Benefits only)

- Choose People -> Total Comp Participation -> Waive Participation in the Navigator.
1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
 2. Query or enter a plan.
 3. Choose the Waiving button.

What-if Eligibility (Advanced Benefits only)

- Choose People -> Total Comp Participation -> What-if Eligibility in the Navigator.

Work Choices (Job and Position)

1. Choose Work Structures -> Job or Position -> Description in the Navigator.
2. Enter or query a job or position.
3. Choose the Work Choices button.

Work Choices (Person)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Work Choices.

Work Day Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Day Information.

Work Schedule

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Schedule.

Reports and Processes in Oracle HRMS

Absences Report

- Absence details for an employee or organization, for some or all absence types.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Assignment Status Report

- All employees, applicants or both assigned to selected work structures.

See: *Managing People Using Oracle HRMS*.

Audit Report (Payroll only)

- Selects person, employee or applicant, assignment, element, recurring or non-recurring status. Shows 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.

See: *Customizing, Reporting and System Administration in Oracle HRMS*.

Cost Breakdown Report (Payroll only)

- Summarized costing totals for a specified costing process and summarized costing totals for a particular consolidation set or payroll and payroll period.

See: *Using Oracle HRMS – The Fundamentals*.

Cost Breakdown Summary Report (Payroll only)

- Lists costing details by date range, payroll, consolidation set, GRE and segment values.

See: *Using Oracle HRMS – The Fundamentals*.

Current and Projected Progression Point Values Report

- The *expected* results of running the Increment Progression Points process, that is the projected point and value changes for a group of employees.

See: *Using Oracle HRMS – The Fundamentals*.

Element Link Details Report

- The eligibility criteria for an element or group of elements.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Element Result Listing

- Run results processed for a particular element over a defined period, and run results for selected input values of each employee's last assignment process.

See: *Running Your Payroll Using Oracle HRMS*.

Employee Increment Results Report

- The *actual* results of running the Increment Progression Points process, that is progression point and value changes for a group of employees.

See: *Using Oracle HRMS – The Fundamentals*.

Employee Organization Movements Report

- New hires, terminations, transfers in and transfer out of a selected organization, or organization hierarchy.

See: *Managing People Using Oracle HRMS*.

Employee Payroll Movements Report (Payroll only)

See: *Managing People Using Oracle HRMS*.

Employee Run Results (Payroll only)

See: *Running Your Payroll Using Oracle HRMS*.

Employee Summary Report

- Addresses, contacts, periods of service, assignments, special information, personal payment methods and element entries for a selected employee.

See: *Managing People Using Oracle HRMS*.

Full Personal Details Report Set

- Person details, applicant details, assignment details and work details for one employee.

See: *Managing People Using Oracle HRMS*.

Job and Position Skills Matching Report

- Lists of employees, applicants or both that meet some or all skill requirements of a job or position.

See: *Managing People Using Oracle HRMS*.

Organization Hierarchy Report

- The organizations and optionally their managers below a selected position in a particular hierarchy.

See: *Using Oracle HRMS – The Fundamentals*.

Position Hierarchy Report

- The positions and optionally their holders below a selected position in a particular hierarchy.

See: *Using Oracle HRMS – The Fundamentals*.

Requisition Summary Report

- Applicants and their interview schedules for a selection of vacancies.

See: *Managing People Using Oracle HRMS*.

Salary Review Report

- Current, past and proposed salaries for a selected list of employees.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Staffing Budget Details Report

- Actual staffing level with budgeted levels over a specified period.

See: *Managing People Using Oracle HRMS*.

Terminations Report

- The number of employees from selected organizations leaving your enterprise within a particular period, and the reason for leaving.

See: *Managing People Using Oracle HRMS*.

Processes

Audit Trail Update Tables Process

- This process is used to set up audit trail on selected windows.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Audit Trail Update Datetracked Tables Process

- This process is used to set up audit trail on selected windows.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

BEE Batch Process (Purge)

- This process is used to delete a batch from the BEE tables on completion of the concurrent request.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Validate)

- This process is used to test each batch line against predefined rules about element entries, and against any additional validation procedures that you have created.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Transfer)

- This process is used to create element entries in the Oracle HRMS Entries table from the existing entries in the BEE temporary tables.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

BEE Batch Process (Rollback)

- This process is used to completely remove a BEE transfer, provided you have not purged the batch from the BEE tables

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Bulk Compile Formulas

- Run this process to compile all your formulas.

See: *Using Oracle FastFormula.*

Close Action Items Process (Advanced Benefits Only)

- Run this process before the Close Enrollments Process to close any open action items that are required or optional for the persons you select.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Close Enrollments Process (Advanced Benefits Only)

- Run this process to close a person's enrollment after elections have been made.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Communications Triggers Process (Advanced Benefits Only)

- Use the communications triggers process to generate communications for persons who meet the selection criteria that you specify.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Costing Process

- Generates journal entries for your ledgers and costing information relating to labor costs.

See: *Using Oracle HRMS – The Fundamentals*.

Default Enrollment Process (Advanced Benefits Only)

- Run this process to enroll participants into the default benefit plan when participants have not made an election.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Dependent Eligibility Process (Advanced Benefits Only)

- Run this process for those benefit plans that include an age factor in determining dependent eligibility.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Extract Process (Advanced Benefits Only)

- Run the extract process to save the output of your system extract to the directory and file that you specified in your extract definition.

See: *Managing Compensation and Benefits Using Oracle HRMS*.

Enable Multiple Security Groups Process

- Run this process when you first set up single responsibility security.

See: *Customizing, Reporting and System Administration in Oracle HRMS*.

Grant Permissions to Roles Process (ROLEGEN)

- Dynamically grants select permissions on Oracle HRMS tables and views to the HR_REPORTING_USER role.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Generate Secure User Process (SECGEN)

- Run this process when you create a new security profile that references a reporting user.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Participation Batch Process: Life Event (Advanced Benefits Only)

- Run this process to determine eligibility and electable choices for benefits participants based on a life event you select.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Participation Batch Process: Scheduled (Advanced Benefits Only)

- Run this process to determine eligibility and electable choices for benefits participants based on a scheduled enrollment event.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Participation Batch Process: Selection (Advanced Benefits Only)

- Run this process to determine eligibility for benefits participants. This process does not create electable choices.

See: *Managing Compensation and Benefits Using Oracle HRMS.*

Security List Maintenance Process (LISTGEN)

- This process is usually run every night to maintain the lists of organizations, positions, payrolls, employees, and applicants that security profile holders can access.

See: *Customizing, Reporting and System Administration in Oracle HRMS.*

Synchronize Positions Process

- This process updates the non-datetracked Positions table (PER_ALL_POSITIONS_F) with changes made to the datetracked table (HR_ALL_POSITIONS_F). When you run the process, any datetracked changes with an effective date on or before today are applied to the non-datetracked table.

Glossary

360 Degree Appraisal Part of the SSHR Appraisal function and also known as a Group Appraisal. This is an employee appraisal undertaken by managers with participation by reviewers.

360 Degree Self Appraisal Part of the SSHR Appraisal function and also known as a Group Appraisal. This is a 360 Degree appraisal initiated by an employee. The employee (initiator) can add managers and reviewers to the appraisal.

A

Absence Types Categories of absence, such as medical leave or vacation leave, that you define for use in absence windows.

Accrual Band A range of values that determines how much paid time off an employee accrues. The values may be years of service, grades, hours worked, or any other factor.

Accrual Plan See: *PTO Accrual Plan*

Accrual Period The unit of time, within an accrual term, in which PTO is accrued. In many plans, the same amount of time is accrued in each accrual period, such as two days per month. In other plans, the amount accrued varies from period to period, or the entitlement for the full accrual term is given as an up front amount at the beginning of the accrual term.

Accrual Term The period, such as one year, for which accruals are calculated. In most accrual plans, unused PTO accruals must be carried over or lost at the end of the accrual term. Other plans have a rolling accrual term which is of a certain duration but has no fixed start and end dates.

Activity Rate The monetary amount or percentage associated with an activity, such as \$12.35 per pay period as an employee payroll contribution for medical coverage. Activity rates can apply to participation, eligibility, coverages, contributions, and distributions.

Actual Premium The per-participant premium an insurance carrier charges the plan sponsor for a given benefit.

Administrative Enrollment A type of scheduled enrollment caused by a change in plan terms or conditions and resulting in a re-enrollment.

Applicant A candidate for employment in a Business Group.

Appraisee A person being appraised by an appraiser..

Appraiser A person, usually a manager, who appraises an employee.

Appraisal An appraisal is a process where an employee's work performance is rated and future objectives set. See also: *Assessment*.

Appraising Manager The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Apply for a Job An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Arrestment Scottish court order made out for unpaid debts or maintenance payments. See also: *Court Order*

Assessment An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job. See also: *Appraisal*.

Assignment An employee's assignment identifies his or her role and payroll within a Business Group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is a required component for payment purposes.

Assignment Number A number that uniquely identifies an employee's assignment. An employee with multiple assignments has multiple assignment numbers.

Assignment Set A grouping of employees and/or applicants that you define for running QuickPaint reports and processing payrolls. See also: *QuickPaint Report*

Assignment Status For employees, used to track their permanent or temporary departures from your enterprise, and to control the remuneration they receive. For applicants, used to track the progress of their applications.

B

BACS Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

Balances Positive or negative accumulations of values over periods of time normally generated by payroll runs. A balance can sum pay values, time periods or numbers. See also: *Predefined Components*

Balance Adjustment A correction you make to a balance. You can adjust user balances and assignment level predefined balances only.

Balance Dimension The period for which a balance sums its balance feeds, or the set of assignments/transactions for which it sums them. There are five time dimensions: Run, Period, Quarter, Year and User. You can choose any reset point for user balances.

Balance Feeds These are the input values of matching units of measure of any elements defined to feed the balance.

Bargaining Unit A bargaining unit is a legally organized group of people which have the right to negotiate on all aspects of terms and conditions with employers or employer federations. A bargaining unit is generally a trade union or a branch of a trade union.

Base Currency The currency in which Oracle Payroll performs all payroll calculations for your Business Group. If you pay employees in different currencies to this, Oracle Payroll calculates the amounts based on exchange rates defined in the system.

Behavioral Indicators Characteristics that identify how a competence is exhibited in the work context. See also: *Proficiency Level*

Benefit Any part of an employee's remuneration package that is not pay. Vacation time, employer-paid medical insurance and stock options are all examples of benefits. See also: *Elements*

Block The largest subordinate unit of a window, containing information for a specific business function or entity. Every window consists of at least one block. Blocks contain fields and, optionally, regions. They are delineated by a bevelled edge. You must save your entries in one block before navigating to the next. See also: *Region, Field*

Budget Value In Oracle Human Resources you can enter staffing budget values and actual values for each assignment to measure variances between actual and planned staffing levels in an organization or hierarchy.

Business Group The highest level organization in the Oracle HRMS system. A Business Group may correspond to the whole of your enterprise or to a major grouping such as a subsidiary or operating division. Each Business Group must correspond to a separate implementation of Oracle HRMS.

Business Number (BN) In Canada, this is the employer's account number with Revenue Canada. Consisting of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

C

Cafeteria Benefits Plan See: Flexible Benefits Program

Calendars In Oracle Human Resources you define calendars that determine the start and end dates for budgetary years, quarters and periods. For each calendar you select a basic period type. In Oracle SSP/SMP you define calendars to determine the start date and time for SSP qualifying patterns.

Calendar Exceptions In Oracle SSP/SMP you define calendar exceptions for an SSP qualifying pattern, to override the pattern on given days. Each calendar exception is another pattern which overrides the usual pattern.

Canada/Quebec Pension Plan (CPP/QPP)

Contributions Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate Offers An SSHR function used by a line manager to offer a job to a candidate. This function is supplied with its own responsibility.

Career Path This shows a possible progression from one job or position from any number of other jobs or positions within the Business Group. A career path must be based on either job progression or position progression; you cannot mix the two.

Carry Over The amount of unused paid time off entitlement an employee brings forward from one accrual term to the next. It may be subject to an expiry date i.e. a date by which it must be used or lost. See also: *Residual*

Cash Analysis A specification of the different currency denominations required for paying your employees in cash. Union contracts may require you to follow certain cash analysis rules.

Certification Documentation required to enroll or change elections in a benefits plan as the result of a life event, to waive participation in a plan, to designate dependents for coverage, or to receive reimbursement for goods or services under an FSA.

Ceiling The maximum amount of unused paid time off an employee can have in an accrual plan. When an employee reaches this maximum, he or she must use some accrued time before any more time will accrue.

Child/Family Support payments In Canada, these are payments withheld from an employee's compensation to satisfy a child or family support order from a Provincial Court. The employer is responsible for withholding and remitting the payments to the court named in the order.

Collective Agreement A collective agreement is a form of contract between an employer or employer representative, for example, an employer federation, and a bargaining unit for example, a union or a union branch.

Communications Benefits plan information that is presented in some form to participants. Examples include a pre-enrollment package, an enrollment confirmation statement, or a notice of default enrollment.

Compensation The pay you give to employees, including wages or salary, and bonuses. See also: *Elements*

Competence Any measurable behavior required by an organization, job or position that a person may demonstrate in the work context. A competence can be a piece of knowledge, a skill, an attitude or an attribute.

Competence Evaluation A method used to measure an employees ability to do a defined job.

Competence Profile Where you record applicant and employee accomplishments, for example, proficiency in a competence.

Competence Requirements Competencies required by an organization, job or position. See also: *Competence*, *Core Competencies*

Competence Type A group of related competencies.

Consolidation Set A grouping of payroll runs within the same time period for which you can schedule reporting, costing, and post-run processing.

Contact A person who has a relationship to an employee that you want to record. Contacts can be dependents, relatives, partners or persons to contact in an emergency.

Contract A contract of employment is an agreement between an employer and employee or potential employee that defines the fundamental legal relationship between an employing organization and a person who offers his or her services for hire. The employment contract defines the terms and conditions to which both parties agree and those that are covered by local laws.

Contribution An employer's or employee's monetary or other contribution to a benefits plan.

Core Competencies Also known as *Leadership Competencies* or *Management Competencies*. The competencies required by every person to enable the enterprise to meet its goals. See also: *Competence*

Costable Type A feature that determines the processing an element receives for accounting and costing purposes. There are four costable types in Oracle HRMS: costed, distributed costing, fixed costing, and not costed.

Costing Recording the costs of an assignment for accounting or reporting purposes. Using Oracle Payroll, you can calculate and transfer costing information to your general ledger and into systems for project management or labor distribution.

Court Order A ruling from a court that requires an employer to make deductions from an employee's salary for maintenance payments or debts, and to pay the sums deducted to a court or local authority. See also: *Arrestment*

Cross Business Group Responsibility

Security This security model uses security groups and enables you to link one responsibility to many Business Groups.

Customizable Forms Forms that your system administrator can modify for ease of use or security purposes by means of Custom Form restrictions. The Form Customization window lists the forms and their methods of customization.

D

Database Item An item of information in Oracle HRMS that has special programming attached, enabling Oracle FastFormula to locate and retrieve it for use in formulas.

Date To and Date From These fields are used in windows not subject to DateTrack. The period you enter in these fields remains fixed until you change the values in either field. See also: *DateTrack*, *Effective Date*

DateTrack When you change your effective date (either to past or future), DateTrack enables you to enter information that takes effect on your new effective date, and to review information as of the new date. See also: *Effective Date*

Deployment Factors See: *Work Choices*

Derived Factor A factor (such as age, percent of fulltime employment, length of service, compensation level, or the number of hours worked per period) that is used in calculations to determine Participation Eligibility or Activity Rates for one or more benefits.

Descriptive Flexfield A field that your organization can customize to capture additional information required by your business but not otherwise tracked by Oracle Applications. See also: *Key Flexfield*

Developer Descriptive Flexfield A flexfield defined by your localization team to meet the specific legislative and reporting needs of your country. See also: *Extra Information Types*

Direct Deposit The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Distribution Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

E

Effective Date The date for which you are entering and viewing information. You set your effective date in the Alter Effective Date window. See also: *DateTrack*

EIT See: *Extra Information Type*

Elements Components in the calculation of employee pay. Each element represents a compensation or benefit type, such as salary, wages, stock purchase plans, and pension contributions.

Element Classifications These control the order in which elements are processed and the balances they feed. Primary element classifications and some secondary classifications are predefined by Oracle Payroll. Other secondary classifications can be created by users.

Element Entry The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value. See also: *Recurring Elements, Nonrecurring Elements*

Element Link The association of an element to one or more components of an employee assignment. The link establishes employee eligibility for that element. Employees whose assignment components match the components of the link are eligible for the element. See also: *Standard Link*

Element Set A group of elements that you define to process in a payroll run, or to control access to compensation information from a customized form, or for distributing costs.

Employee Histories An SSHR function for an employee to view their, Training History, Job Application History, Employment History, Absence History, or Salary History. A manager can also use this function to view information on their direct reports.

Employment Category A component of the employee assignment. Four categories are defined: Full Time – Regular, Full Time – Temporary, Part Time – Regular, and Part Time – Temporary.

Employment Insurance (EI) Benefit plan run by the federal government to which the majority of Canadian employers and employees must contribute.

Employment Insurance Rate In Canada, this is the rate at which the employer contributes to the EI fund. The rate is expressed as a percentage of the employee's contribution. If the employer maintains an approved wage loss replacement program, they can reduce their share of EI premiums by obtaining a reduced contribution rate. Employers would remit payroll deductions under a different employer account number for employees covered by the plan.

Employment Equity Occupational Groups (EEOG) In Canada, the Employment Equity Occupational Groups (EEOG) consist of 14 classifications of work used in the Employment Equity Report. The EEOGs were derived from the National Occupational Classification system.

Enroll in a Class An SSHR function which enables an employee to search and enroll in an internally published class. An employee can also use this function to maintain their competencies.

Enrollment Action Type Any action required to complete enrollment or de-enrollment in a benefit.

ESS Employee Self Service. A predefined SSHR responsibility.

Event An activity such as a training day, review, or meeting, for employees or applicants.

Expected Week of Confinement (EWC) In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of confinement is used in the calculations for Statutory Maternity Pay (SMP).

Extra Information Type (EIT) A type of developer descriptive flexfield that enables you to create an unlimited number of information types for six key areas in Oracle HRMS. Localization teams may also predefine some EITs to meet the specific legislative requirements of your country. See also: *Developer Descriptive Flexfield*

F

Field A view or entry area in a window where you enter, view, update, or delete information. See also: *Block, Region*

Flex Credit A unit of "purchasing power" in a flexible benefits program. An employee uses flex credits, typically expressed in monetary terms, to "purchase" benefits plans and/or levels of coverage within these plans.

Flexible Benefits Program A benefits program that offers employees choices among benefits plans and/or levels of coverage. Typically, employees are given a certain amount of flex credits or moneys with which to "purchase" these benefits plans and/or coverage levels.

Flexible Spending Account (FSA) Under US Internal Revenue Code Section 125, employees can set aside money on a pretax basis to pay for eligible unreimbursed health and dependent care expenses. Annual monetary limits and use-it-or-lose-it provisions exist. Accounts are subject to annual maximums and forfeiture rules.

Form A predefined grouping of functions, called from a menu and displayed, if necessary, on several windows. Forms have blocks, regions and fields as their components. See also: *Block, Region, Field*

G

Global Value A value you define for any formula to use. Global values can be dates, numbers or text.

Goods or Service Type A list of goods or services a benefit plan sponsor has approved for reimbursement.

Grade A component of an employee's assignment that defines their level and can be used to control the value of their salary and other compensation elements.

Grade Comparatio A comparison of the amount of compensation an employee receives with the mid-point of the valid values defined for his or her grade.

Grade Rate A value or range of values defined as valid for a given grade. Used for validating employee compensation entries.

Grade Scale A sequence of steps valid for a grade, where each step corresponds to one point on a pay scale. You can place each employee on a point of their grade scale and automatically increment all placements each year, or as required. See also: *Pay Scale*

Grade Step An increment on a grade scale. Each grade step corresponds to one point on a pay scale. See also: *Grade Scale*

Grandfathered A term used in Benefits Administration. A person's benefits are said to be grandfathered when a plan changes but they retain the benefits accrued.

Group A component that you define, using the People Group key flexfield, to assign employees to special groups such as pension plans or unions. You can use groups to determine employees' eligibility for certain elements, and to regulate access to payrolls.

H

Hierarchy An organization or position structure showing reporting lines or other relationships. You can use hierarchies for reporting and for controlling access to Oracle HRMS information.

I

Imputed Income Certain forms of indirect compensation that US Internal Revenue Service Section 79 defines as fringe benefits and taxes the recipient accordingly. Examples include employer payment of group term life insurance premiums over a certain monetary amount, personal use of a company car, and other non-cash awards.

Initiator In SSHR a person who starts a 360 Degree appraisal (Employee or Self) on an individual. An initiator and the appraisee are the only people who can see all appraisal information.

Input Values Values you define to hold information about elements. In Oracle Payroll, input values are processed by formulas to calculate the element's run result. You can define up to fifteen input values for an element.

Instructions An SSHR user assistance component displayed on a web page to describe page functionality.

K

Key Flexfield A flexible data field made up of segments. Each segment has a name you define and a set of valid values you specify. Used as the key to uniquely identify an entity, such as jobs, positions, grades, cost codes, and employee groups. See also: *Descriptive Flexfield*

L

Leaver's Statement In the UK, this Records details of Statutory Sick Pay (SSP) paid during a previous employment (issued as form SSP1L) which is used to calculate a new employee's entitlement to SSP. If a new employee falls sick, and the last date that SSP was paid for under the previous employment is less than eight calendar weeks before the first day of the PIW for the current sickness, the maximum liability for SSP is reduced by the number of weeks of SSP shown on the statement.

Life Event A significant change in a person's life that results in a change in eligibility or ineligibility for a benefit.

Life Event Collision A situation in which the impacts from multiple life events on participation eligibility, enrollability, level of coverage or activity rates conflict with each other.

Life Event Enrollment A benefits plan enrollment that is prompted by a life event occurring at any time during the plan year.

Linking Interval In the UK, this is the number of days that separate two periods of incapacity for work. If a period of incapacity for work (PIW) is separated from a previous PIW by less than the linking interval, they are treated as one PIW according to the legislation for entitlement to Statutory Sick Pay (SSP). An employee can only receive SSP for the maximum number of weeks defined in the legislation for one PIW.

Linked PIWs In the UK, these are linked periods of incapacity for work that are treated as one to calculate an employee's entitlement to Statutory Sick Pay (SSP). A period of incapacity for work (PIW) links to an earlier PIW if it is separated by less than the linking interval. A linked PIW can be up to three years long.

LMSS Line Manager Self Service. A predefined SSHR responsibility.

Lookup Types Categories of information, such as nationality, address type and tax type, that have a limited list of valid values. You can define your own Lookup Types, and you can add values to some predefined Lookup Types.

Lower Earnings Limit (LEL) In the UK, this is the minimum average weekly amount an employee must earn to pay National Insurance contributions. Employees who do not earn enough to pay National Insurance cannot receive Statutory Sick Pay (SSP) or Statutory Maternity Pay (SMP).

M

Manager-Employee Appraisal Part of the SSHR Appraisal function. A manager appraisal of an employee. However, an appraising manager does not have to be a manager.

Maternity Pay Period In the UK, this is the period for which Statutory Maternity Pay (SMP) is paid. It may start at any time from the start of the 11th week before the expected week of confinement and can continue for up to 18 weeks. The start date is usually agreed with the employee, but can start at any time up to the birth. An employee is not eligible to SMP for any week in which she works or for any other reason for ineligibility, defined by the legislation for SMP.

Menus You set up your own navigation menus, to suit the needs of different users.

N

NACHA National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

Net Accrual Calculation The rule that defines which element entries add to or subtract from a plan's accrual amount to give net entitlement.

Net Entitlement The amount of unused paid time off an employee has available in an accrual plan at any given point in time.

Nonrecurring Elements Elements that process for one payroll period only unless you make a new entry for an employee. See also: *Recurring Elements*

North American Industrial Classification (NAIC) code The North American Industrial Classification system (NAICs) was developed jointly by the US, Canada and Mexico to provide comparability in statistics regarding business activity across North America. The NAIC replaces the US Standard Industrial Classification (SIC) system, and is used in the Employment Equity Report.

National Occupational Classification (NOC) code In Canada, the National Occupational Classification (NOC) System was developed to best reflect the type of work performed by employees. Occupations are grouped in terms of particular tasks, duties and responsibilities. The use of this standardized system ensures consistency of data from year to year within the same company as well as between companies. These codes are used in the Employment Equity Report.

Not in Program Plan A benefit plan that you define outside of a program.

O

Open Enrollment A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula An Oracle tool that allows you to write Oracle HRMS formulas without using a programming language.

Organization A required component of employee assignments. You can define as many organizations as you want within your Business Group. Organizations can be internal, such as departments, or external, such as recruitment agencies. You can structure your organizations into organizational hierarchies for reporting purposes and for system access control.

OSSWA Oracle Self Service Web Applications.

OTM Oracle Training Management.

P

Pattern A pattern comprises a sequence of time units that are repeated at a specified frequency. Oracle SSP/SMP uses SSP qualifying patterns to determine employees entitlement to Statutory Sick Pay (SSP).

Pattern Time Units A sequence of time units specifies a repeating pattern. Each time unit specifies a time period of hours, days or weeks.

Pay Scale A set of progression points that can be related to one or more rates of pay. Employee's are placed on a particular point on the scale according to their grade and, usually, work experience. See also: *Grade Scale*

Payment Type There are three standard payment types for paying employees: check, cash and direct deposit. You can define your own payment methods corresponding to these types.

Payroll A group of employees that Oracle Payroll processes together with the same processing frequency, for example, weekly, monthly or bimonthly. Within a Business Group, you can set up as many payrolls as you need.

People List An SSHR line manager utility used to locate an employee.

Performance (within Assessment) An expectation of "normal" performance of a competence over a given period. For example, a person may exceed performance expectation in the communication competence. See also: *Proficiency (within Assessment)*, *Competence, Assessment*

Period of Incapacity for Work (PIW) In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period Type A time division in a budgetary calendar, such as week, month, or quarter.

Person Search An SSHR function which enables a manager to search for a person. There are two types of search, Simple and Advanced.

Person Type There are eight system person types in Oracle HRMS. Seven of these are combinations of employees, ex-employees, applicants, and ex-applicants. The eighth category is 'External'. You can create your own user person types based on the eight system types.

Personal Tax Credits Return (TD1) A Revenue Canada form which each employee must complete. Used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount to withhold from the employee's wages for federal/provincial taxes.

Plan Design The functional area that allows you to set up your benefits programs and plans. This process involves defining the rules which govern eligibility, available options, pricing, plan years, third party administrators, tax impacts, plan assets, distribution options, required reporting, and communications.

Plan Sponsor The legal entity or business responsible for funding and administering a benefits plan. Generally synonymous with employer.

Position A specific role within the Business Group derived from an organization and a job. For example, you may have a position of Shipping Clerk associated with the organization Shipping and the job Clerk.

Predefined Components Some elements and balances, all primary element classifications and some secondary classifications are defined by Oracle Payroll to meet legislative requirements, and are supplied to users with the product. You cannot delete these predefined components.

Professional Information An SSHR function which allows an employee to maintain their own professional details or a line manager to maintain their direct reports professional details.

Proficiency (within Assessment) The perceived level of expertise of a person in a competence, in the opinion of the assessor, over a given period. For example, a person may demonstrate the communication competence at Expert level. See also: *Performance (within Assessment)*, *Competence*, *Assessment*

Proficiency Level A system for expressing and measuring how a competence is exhibited in the work context. See also: *Behavioral Indicators*.

Progression Point A pay scale is calibrated in progression points, which form a sequence for the progression of employees up the pay scale. See also: *Pay Scale*

Provincial/Territorial Employment Standards Acts In Canada, these are laws covering minimum wages, hours of work, overtime, child labour, maternity, vacation, public/general holidays, parental and adoption leave, etc., for employees regulated by provincial/territorial legislation.

Provincial Health Number In Canada, this is the account number of the provincially administered health care plan that the employer would use to make remittances. There would be a unique number for each of the provincially controlled plans i.e. EHT, Quebec HSF, etc.

PTO Accrual Plan A benefit in which employees enroll to entitle them to accrue and take paid time off. The purpose of absences allowed under the plan, who can enroll, how much time accrues, when the time must be used, and other rules are defined for the plan.

Q

QPP (See Canada/Quebec Pension Plan)

Qualification Type An identified qualification method of achieving proficiency in a competence, such as an award, educational qualification, a license or a test. See also: *Competence*

Qualifying Days In the UK, these are days on which Statutory Sick Pay (SSP) can be paid, and the only days that count as waiting days. Qualifying days are normally work days, but other days may be agreed.

Qualifying Pattern See: *SSP Qualifying Pattern*

Qualifying Week In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire An SSHR function which records the results of an appraisal.

QuickPaint Report A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want. See also: *Assignment Set*

R

Rates A set of values for employee grades or progression points. For example, you can define salary rates and overtime rates.

Rating Scale Used to describe an enterprise's competencies in a general way. You do not hold the proficiency level at the competence level. See also: *Proficiency Level*

Record of Employment (ROE) A Human Resources Development Canada form that must be completed by an employer whenever an interruption of earnings occurs for any employee. This form is necessary to claim Employment Insurance benefits.

Recruitment Activity An event or program to attract applications for employment. Newspaper advertisements, career fairs and recruitment evenings are all examples of recruitment activities. You can group several recruitment activities together within an overall activity.

Recurring Elements Elements that process regularly at a predefined frequency. Recurring element entries exist from the time you create them until you delete them, or the employee ceases to be eligible for the element. Recurring elements can have standard links. See also: *Nonrecurring Elements, Standard Link*

Region A collection of logically related fields in a window, set apart from other fields by a rectangular box or a horizontal line across the window. See also: *Block, Field*

Registered Pension Plan (RPP) This is a pension plan that has been registered with Revenue Canada. It is a plan where funds are set aside by an employer, an employee, or both to provide a pension to employees when they retire. Employee contributions are generally exempt from tax.

Registered Retirement Savings Plan (RRSP) This is an individual retirement savings plan that has been registered with Revenue Canada. Usually, contributions to the RRSP, and any income earned within the RRSP, is exempt from tax.

Report Parameters Inputs you make when submitting a report to control the sorting, formatting, selection, and summarizing of information in the report.

Report Set A group of reports and concurrent processes that you specify to run together.

Requisition The statement of a requirement for a vacancy or group of vacancies.

Request Groups A list of reports and processes that can be submitted by holders of a particular responsibility. See also: *Responsibility*

Residual The amount of unused paid time off entitlement an employee loses at the end of an accrual term. Typically employees can carry over unused time, up to a maximum, but they lose any residual time that exceeds this limit. See also: *Carry Over*

Responsibility A level of authority in an application. Each responsibility lets you access a specific set of Oracle Applications forms, menus, reports, and data to fulfill your business role. Several users can share a responsibility, and a single user can have multiple responsibilities. See also: *Security Profile, User Profile Options, Request Groups, Security Groups*

Retry Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

Reviewer (SSHR) A person invited by an appraising manager to add review comments to an appraisal.

Reversal Method of correcting payroll runs or QuickPay runs *after* post-run processing has taken place. The system replaces positive run result values with negative ones, and negative run result values with positive ones. Both old and new values remain on the database.

Rollback Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

S

Search by Date An SSHR sub-function used to search for a Person by Hire date, Application date, Job posting date or search by a Training event date.

Salary Basis The period of time for which an employee's salary is quoted, such as hourly or annually. Defines a group of employees assigned to the same salary basis and receiving the same salary element.

Scheduled Enrollment A benefits plan enrollment that takes place during a predefined enrollment period, such as an open enrollment. Scheduled enrollments can be administrative, open, or unrestricted.

Security Group Security groups enable HRMS users to partition data by Business Group. Only used for Cross Business Group Responsibility security. See also: *Responsibility, Security Profile, User Profile Options*

Security Profile Security profiles control access to organizations, positions and employee and applicant records within the Business Group. System administrators use them in defining users' responsibilities. See also: *Responsibility*

Self Appraisal Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

SMP See: *Statutory Maternity Pay*

Social Insurance Number (SIN) A unique number provided by Human Resources Development Canada (HRDC) to each person commencing employment in Canada. The number consists of 9 digits in the following format (###-###-###).

Source Deductions Return (TP 1015.3)

A Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

SSHR Oracle Self-Service Human Resources. An HR management system using an intranet and web browser to deliver functionality to employees and their managers.

SSP See: *Statutory Sick Pay*

SSP Qualifying Pattern In the UK, an SSP qualifying pattern is a series of qualifying days that may be repeated weekly, monthly or some other frequency. Each week in a pattern must include at least one qualifying day. Qualifying days are the only days for which Statutory Sick Pay (SSP) can be paid, and you define SSP qualifying patterns for all the employees in your organization so that their entitlement to SSP can be calculated.

Standard Link Recurring elements with standard links have their element entries automatically created for all employees whose assignment components match the link. See also: *Element Link*, *Recurring Elements*

Statement of Commissions and Expenses for Source Deduction Purposes (TP

1015.R.13.1) A Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of Remuneration and Expenses

(TD1X) In Canada, the Statement of Remuneration and Expenses allows an employee who is paid partly or entirely by commission to pay a constant percentage of income tax, based on his or her estimated income for the year, less business-related expenses.

Statutory Maternity Pay In the UK, you pay Statutory Maternity Pay (SMP) to female employees who take time off work to have a baby, providing they meet the statutory requirements set out in the legislation for SMP.

Standard HRMS Security The standard security model. Using this security model you must log on as a different user to see a different Business Group. See: *Multiple Responsibility Security*

Statutory Sick Pay In the UK, you pay Statutory Sick Pay (SSP) to employees who are off work for four or more days because they are sick, providing they meet the statutory requirements set out in the legislation for SSP.

Succession Planning An SSHR function which enables a manager to prepare a succession plan.

Suitability Matching An SSHR function which enables a manager to compare and rank a persons competencies.

T

Tabbed Regions Parts of a window that appear in a stack so that only one is visible at any time. You click on the tab of the required region to bring it to the top of the stack.

Task Flows A sequence of windows linked by buttons to take you through the steps required to complete a task, such as hiring a new recruit. System administrators can create task flows to meet the needs of groups of users.

Terminating Employees You terminate an employee when he or she leaves your organization. Information about the employee remains on the system but all current assignments are ended.

Termination Rule Specifies when entries of an element should close down for an employee who leaves your enterprise. You can define that entries end on the employee's actual termination date or remain open until a final processing date.

Tips An SSHR user assistance component that provides information about a field.

U

User Assistance Components SSHR online help comprising tips and instructions.

User Balances Users can create, update and delete their own balances, including dimensions and balance feeds. See also: *Balances*

User Profile Options Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements. See also: *Responsibility, Security Profile*

V

Viewer (SSHR) A person with view only access to an appraisal. An appraising manager or an employee in a 360 Degree Self appraisal can appoint view only access to an appraisal.

W

WCB Account Number In Canada, this is the account number of the provincially administered Worker's Compensation Board that the employer would use to make remittances. There would be a unique number for each of the provincially controlled boards i.e. Workplace Safety & Insurance Board of Ontario, CSST, etc.

Waiting Days In the UK, statutory Sick Pay is not payable for the first three qualifying days in period of incapacity for work (PIW), which are called waiting days. They are not necessarily the same as the first three days of sickness, as waiting days can be carried forward from a previous PIW if the linking interval between the two PIWs is less than 56 days.

Work Choices Also known as Work Preferences, Deployment Factors, or Work Factors. These can affect a person's capacity to be deployed within an enterprise, such willingness to travel or relocate. You can hold work choices at both job and position level, or at person level.

Worker's Compensation Board In Canada, this is a provincially governed legislative body which provides benefits to employees upon injury, disability, or death while performing the duties of the employer. Worker's Compensation Board premiums are paid entirely by the employer.

Workflow An Oracle application which uses charts to manage approval processes and in addition is used in SSHR to configure display values of sections within a web page and instructions.

Work Structures The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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