Managing People Using Oracle® HRMS (Canada)

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Glossary

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Reader's Comment Form

Managing People Using Oracle® HRMS (Canada)
A73321–01

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.

- Did you find any errors?
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- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
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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 Managing People Using Oracle HRMS (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 explains how you can use Oracle HRMS to store, query, and track employment and personal information.
- Chapter 2 explains how you can use Oracle HRMS to provide control over your entire recruitment cycle, from the stage where a vacancy is first identified, through to the appointment or rejection of an applicant. Using Oracle HRMS, you can set up your recruitment procedures exactly as your enterprise requires.
- Chapter 3 explains how to use Oracle HRMS to manage careers and succession using competence management and special information types.
- Chapter 4 explains how you can use Oracle HRMS to define and manage all your human resource budgets.

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

Using the AD Utilities

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

Oracle Applications Product Update Notes

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

Oracle Applications System Administrator's Guide

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

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

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

CHAPTER

1

Employee Management

Employee Management

How does Oracle HRMS enable you to manage all the people who make up your organization?

Oracle HRMS understands that the people associated with your enterprise are your most valuable resources. Using Oracle HRMS you can hold, inquire on and track a wide range of personal information. This can include medical details, work schedules, preferred language for correspondence and personal contacts, as well as the basic details such as date of birth, employee number and addresses.

You also need to record information about what the people in your enterprise are employed to do. You can enter, maintain, report and inquire about all aspects of employment information.

Oracle HRMS enables you to enter and track people from the day they apply for a job to the day they leave your enterprise.

Can you enter information specific to your enterprise?

Yes, you can. Not every enterprise holds the same information about employees, therefore you can customize Oracle HRMS using descriptive flexfields, Extra Information Types, and Special Information Types to record everything you need to know.

Employee Management Overview

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

Managing Employees on a Daily Basis

To enable you to manage your employees on a daily basis Oracle HRMS provides you with the following features:

- **People Window**: Oracle HRMS provides you with one window, the People window, in which you can enter all the information you need about your employees. In this window, you can quickly and easily enter, track, inquire and report on people on a day to day basis.
- **Employee Development**: The development of employees throughout their employment with your enterprise is also important. Using Oracle HRMS you can set up and maintain competence profiles, qualifications, school attendance and work choices, efficiently managing your employee development.
- **Track People's Roles and Activities**: You need to be able to record an employee's life with your enterprise, from when they apply for a job to when they leave your enterprise. Oracle HRMS provides you with the ability to track people's roles and activities.

As an alternative, SSHR enables employees and line managers to maintain and update information themselves, using a web browser.

Managing Employment Details

To enable you to manage your employee details Oracle HRMS provides you with the following features:

- **Employment Information**: As well as recording personal information about employees you also need to record how they work for your enterprise. HRMS enables you to manage all your employment information.
- **Employee Assignments**: To enable you to record the details about the different work an employee does for your enterprise and relate your employees to the overall work structure, Oracle HRMS provides you with employee assignments.
- **Identifying Employees and Assignments**: Oracle HRMS uses two unique identifiers for employees:

– Employee number: This uniquely identifies every employee in your Business Group.

– Employee assignment number: This uniquely identifies every assignment that exists within your Business Group.

Managing Your Employees

To help you manage your employees, Oracle HRMS provides you with the following features. These are set up before you use Oracle HRMS on a daily basis:

- **Person Types**: Your enterprise is made up of many different groups of people, for example, applicants and employees. For each group there may be different types of information you need to record and manage. You may also want to restrict access of the records to different groups of people.
- **Assignment Statuses**: Changes in an employee's assignment can be recorded using different statuses. For example, an employee's assignment may be suspended while they are on maternity leave. By changing the status of an assignment you can indicate your employees' work is:
  - active
  - suspended
  - terminated – further pay processing can occur
  - ended – further pay processing may not occur

  To provide you with further flexibility you can expand the system statuses that are predefined. For example, for the system status of suspended, you can have the user statuses of maternity leave, paternity leave and military leave.
- **Special Information Types**: In addition to the employee information you can enter, you may want to record special information unique to your enterprise. Oracle HRMS enables you to design fields to hold any special information using special information types. These fields hold the information that is unique to your enterprise.

Maintaining Employee Information

Specific types of information can be maintained for each employee in your organization. This includes maintaining information such as address, tax sign-up, statutory holiday tracking, work permit numbers, and designated group information.

People Window

Every enterprise must be able to record personal information for its employees, applicants, and contacts. HRMS enables you to enter and update this information for all person types on one form – the People window. You can enter information about:

- New employees
- Employment
- Office location
- Applicants
- Background checks
- Re–hire recommendations
- Further names
- Medical details
- Address details
- Telephone numbers
- Picture record
- Dependents, beneficiaries and other contacts
- Contracts

You can also use this window to update people's statuses, for example, from applicant to employee.

> **Note:** The system administrator can create customized versions of the People window so that you use each version for certain person types only or for certain functions only (entering employees, entering applicants, or hiring applicants).

Displaying Personal Information

Oracle HRMS enables you to easily access all the information you enter about people. There are lots of ways to view information about people held in Oracle HRMS. You can select the approach that best fits your needs. For example, you can:

- Use Employee Direct Access to view and update your own personal details using a web browser.
- Use Line Manager Direct Access to view information about people in your organization.
- Use the Find Person window or a People folder to display the people who interest you, then 'drill down', by clicking on buttons, to the information you need.

- Use an inquiry window to view specific information about a person, such as employment or absence history.

  See: Using Inquiry Windows and Folders, *Customizing, Reporting and System Administration in Oracle HRMS*

- Use QuickPaint to design a report incorporating personal, assignment, application, or compensation information.

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

Employee Development

As you recruit new people and develop existing employees, you need to track their competencies and work preferences. This enables you to match them to projects and vacancies, develop succession plans, and organize further training and certification. In Oracle HRMS, you can record the following information:

- A competence profile – this is a list of the competencies held by a person and their level of proficiency in each competence.
- Qualifications, including details of individual subjects, grades, licenses, status of ongoing training and tuition fees.
- Attendances at educational establishments, such as schools and colleges.
- Work choices, including willingness to travel and relocate; preferred working hours, work schedule, and duration within post and preferred countries for international relocation.

You can enter this information when an employee first joins the enterprise, taking the details from their resume or from tests or interviews. You might update it after the employee successfully completes a training course, and after periodic assessments or appraisals.

You can either enter this information using standard Oracle HRMS windows or using the web–based Line Manager Direct Access.

Copying Core or Primary Assignment Competencies

Some competencies are important for all employees throughout your enterprise; others are required for particular jobs, positions, or organizations. If competencies have been entered as core competencies for your enterprise or as requirements against a person's job, position, or organization, you can copy them to the person's competence profile. Copying competencies not only saves you time from having to enter the details yourself, but it also ensures that you do not miss entering relevant competencies.

To assist you in entering applicants and evaluating employees against vacancies, you can also copy competencies from a vacancy. The system checks all the competence requirements of the organization, job and/or position for which the vacancy is defined. It enters these against the person so that you can record the person's proficiency in each competence and then compare applicants against the vacancy's requirements.

Managing Competencies Over Time

You can make changes to the competencies and proficiency levels your employees possess over time, enabling you to see both the current and historical information. When you view a competence profile, you can choose to see just the current profile, or the whole record if you want to see changes over time.

Use Oracle Alert's automatic mail notification to keep you informed when an employee's competencies need certification and renewal. This frees your time for more essential tasks. For example, you could use the competence Renewal Period to drive Oracle Alert. This compares the renewal period date with the date on the person's Competence Profile, or the last training class delivering the skill.

See: *Oracle Alert Reference Manual*.

Tracking People's Roles and Activities

The following table lists the windows you can use to track the roles and activities of employees and applicants. These windows are described in elsewhere, as listed in the table.

You can also use the web–based Line Manager Direct Access to enter some information, such as assessments and appraisals, and to view a wide range of employee data, including employment history, roles (for example who they manage or supervise) and absence history.

See: What Is Oracle Self–Service Human Resources (SSHR), *Using Oracle HRMS – The Fundamentals*

Window	Purpose	See
Application	Describes the vacancy for which an applicant has applied	Applications and Assignments: page 2 – 10
Absence Detail	Records an employee's absence from work	Absence Recording, *Managing Compensation and Benefits Using Oracle HRMS*
Book Events	Records that an employee or applicant will attend an event. The event must be already defined in the Event Bookings window. If you use Oracle Training Administration, see: Introduction to Oracle Training Administration, *Using Oracle Training Administration*	Event and Attendance Administration: page 3 – 43
Employee Review	Schedules and records details of an employee's review or other interview type	Employee Reviews: page 3 – 43
Applicant Interview	Schedules and records details of an applicant's interviews	Interviews and Other Recruitment Events: page 2 – 15

Other Windows for Personal Information

Window	Purpose	See
Assignment	Records details of an employee's assignment	The Employee Assignment: page 1 – 14
Contract	Records details of an employee's contract	Entering Contracts: page 1 – 60

Other Windows for Personal Information

You can enter other work–related information for employees, such as salary and payment methods, after entering the employee's employment information using assignments.

Employment Information

As well as recording personal information about employees you also need to record how they work for your enterprise. HRMS enables you to manage all your employment information and track the changes in employment information for each employee over the lifetime of their employment.

Oracle HRMS enables you to efficiently manage change in your enterprise for appropriate groups of people:

- Where a change affects a group, you can effect that change for every individual in the group according to a set of rules.
- Where a change affects only a few individuals, you can enter changes for just those individuals.

In Oracle HRMS, you manage these changes through the *employee assignment*:

- The assignment connects employees to your enterprise's work structures and policies, so that changes to the structures and policies are reflected in the employee's records.
- You can query groups of employees with similar assignments (such as all assignments on grade C2) and make changes for each employee in these groups.

Also, Oracle HRMS provides a number of predefined inquiry windows and reports for employment information. You can create your own inquires and reports using QuickPaint or other reporting tools.

For more information, see: Information Access, *Customizing, Reporting and System Administration in Oracle HRMS*

Summary of Employment Information

The following table shows the employment information typically held for an employee in Oracle HRMS and how you enter it.

Employment Information	**Method of Entering**
Job Title or Position	Assign the employee to work structures in the Assignment window.
Department	
Location	
Grade	

Employment Information

Employment Information	Method of Entering
Grade Step Placement	Enter in the Grade Step Placement window. Enter any special ceiling in the Assignment window.
Name of manager or position to report to	Use a position hierarchy or enter the supervisor's name in the Assignment window.
Salary	Assign to a salary basis in the Assignment window; enter amount in the Salary Administration window.
Benefits	Enroll the employee in a Flex Program, Non–flex Program, Savings Plan, or Miscellaneous Plan.
Pay Frequency	Assign to a payroll in the Assignment window.
Pay Method	Accept the default from the Payroll to which the employee is assigned or select a method in the Personal Payment Method window.
Full time / part time status	Assign to an employment category.
Standard Work Day	Enter in the Assignment window or accept the default from the organization or position to which the employee is assigned.
Overtime rules	Define an element, using links to define eligibility rules, and element entry defaults or validation to control the values given.
Vacation Entitlement Sickness Entitlement Maternity Entitlement	Define absence types and set up increasing or decreasing balances for the employee; enroll employee in appropriate accrual plans.
Notice Period Disciplinary procedure	You should hold full text procedures and regulations outside the system. You can associate groups of people with different rules or procedures using the People Group key flexfield.
Costing	Enter cost codes for the assignment in the Costing window, or accept the default from the organization to which the employee is assigned.
Probation Period	Enter in the Assignment window.

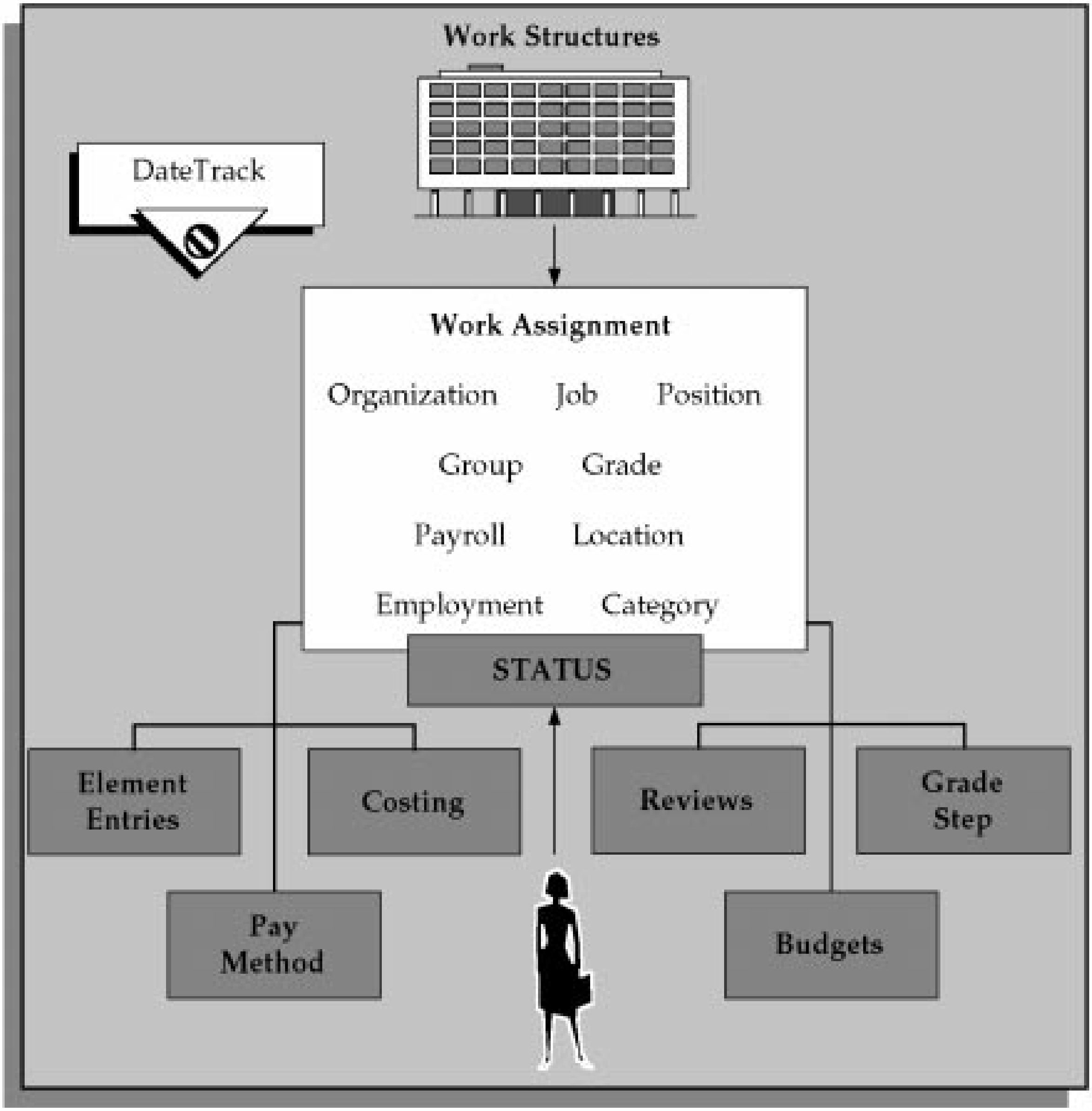
Employment Information

The Employee Assignment

The assignment is the central concept that relates employees to the structures in which they work, and the compensation and benefits for which they are eligible.

In Oracle HRMS, many of the activities you undertake in human resource management, such as vacancy management and budget planning, are based around assignments and not people. In particular, you enter all earnings, deductions, and other pay–related elements for the employee assignment, rather than the employee. This makes it possible to give an employee two or more assignments when this is necessary.

> **Note:** The assignment is datetracked to maintain a work history as the employee moves through your enterprise.



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

Components of the Assignment

At a minimum, an assignment defines the Business Group and GRE for which an employee works, the date the assignment began, and its current status, such as active or suspended.

You can use the assignment to define more precisely the place of the employee in the enterprise, including his or her job, position, organization, location, grade, and supervisor. You can also assign the employee to any of the employee groups you set up using the People Group key flexfield, such as pension groups or unions.

You can assign employees to an employment category, such as Part Time – Regular or Full Time – Temporary. Your startup data includes four categories, and you can add others for the Lookup Type EMP_CAT.

You can assign employees to a *salary basis* and maintain their salaries or wages using the Salary Administration procedure.

Multiple Assignments

If your enterprise permits employees to work in two or more different capacities at once and thereby become eligible for different benefits, you can enter multiple assignments for them. An employee can have multiple assignments, but only one is the primary assignment, any others are *secondary.*

Relocations, transfers, promotions and so on go on record as datetracked changes to employees' existing assignments. You do not enter new assignments for changes like these.

For example, if a university professor of history also coaches the baseball team, receiving additional pay but retaining the same benefits, there is no reason to give him a second assignment. But if he becomes eligible for different benefits as a coach, it is best to give him a separate assignment for this work.

Managing Multiple Assignments

Oracle HRMS separately manages each assignment, together with its associated compensation and benefits. When an employee has more than one assignment, one assignment is designated as the primary assignment. When you hire an employee (by entering a person as an employee, or by changing the person type to employee), Oracle HRMS automatically creates a primary assignment for that employee. (The Primary box is automatically checked in the Miscellaneous tabbed region of the Assignment window).

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

You can end all assignments except the primary assignment by entering a status change in the Assignment window. However to end an employee's primary assignment, you must terminate the employee, using the Terminate window.

To show that an assignment is part time, you use the employment categories Part Time – Regular or Part Time – Temporary. You could also set up a Full Time Equivalent budget, and weight each assignment as a fraction of a full time equivalent for the calculation of actual values. For more information about budgeting see

Human Resource Budgets: page 4 – 3

Notice that when employees split their time between two departments performing the same job, or fulfill two different roles in one organization, you do not need to define two separate assignments to maintain accurate costing records. You can set up cost allocation to distribute proportions of one assignment's payroll costs to different cost centers. For more information see:

Costing Information at the Organization and Assignment Levels, *Using Oracle HRMS – The Fundamentals*

Managing Changes in Assignment Information

When an employee experiences changes such as a promotion or transfer, or moves from full time to part time, you change a component of the assignment. A change to any of the assignment components produces the DateTrack prompt.

- If you choose *Correction*, Oracle HRMS overwrites the existing assignment information back to the last effective from date.
- If you choose *Update*, Oracle HRMS records the date and change, and retains the original information.

By changing your effective date on the system, you can see the employee's assignment at any point in time. You can also view the changes made to the assignment over time using DateTrack History.

DateTrack History shows the changes made to one assignment. Use the Assignment History window to view the history of all the employee's assignments, both currently and in any previous periods of service.

Effects of Changing an Assignment

Changing any assignment component can have the following effects:

- The employee may lose eligibility for some compensation types, benefits or deductions, and gain eligibility for others. You receive a warning that the system automatically ends any unprocessed element entries for which the employee is no longer eligible.
- The employee may have a different level of access to Oracle HRMS, since the system's security is based on assignment to work structures.
- If you change the employee's grade when a grade step placement exists for the assignment, you receive a warning message that the placement will be date effectively ended and any future placements will be deleted. Also, the special ceiling point field is cleared.

Note: If an assignment change causes the system to change element entries, you may not be able to save the change if a current or future pay period is closed. You must reopen the period or change your effective date to make the change.

Ending Assignments and Terminating Employees

Oracle HRMS does not permit an employee to exist in the system without an assignment. That is, an employee must always have at least one assignment at any point in time. This means that for an employee with just one assignment, the only way to end the assignment is to terminate the employee, using the Terminate window.

For employees with more than one assignment, you can end all but one of their assignments by selecting an assignment status of End or Terminate in the Assignment window. At sites using Oracle Payroll, the choice of End or Terminate controls the ability to include the assignment in a payroll run after the date the assignment ends. Sites not using Oracle Payroll can use these two statuses to provide information. For example, End may mean that further pay processing cannot occur for the assignment, while Terminate may mean that further processing can occur. Alternatively, these sites can simply use the status End.

Identifying Employees and Assignments

Oracle HRMS uses two unique identifiers for employees:

- Employee number
- Employee assignment number

By using the Person Search function in SSHR, you can search for employees by employee number and assignment number.

See: Person Search, *Implementing Oracle Self–Service Human Resources (SSHR)*

You can also search for an employee by employee number in the Find Person window

See: Finding a Person Using the Find Person Window: page 1 – 37

Employee Number

The employee number uniquely identifies every employee in your Business Group.

An employee can have only one employee number. You decide how this number is to be generated when you define your Business Group:

- Automatic
- Manual
- National Identifier (for example, the US Social Security Number, the Canadian Social Insurance Number or the UK National Insurance Number)

If you choose automatic or national identifier number generation, the employee number, by default, remains the same for an employee who has multiple periods of service. If you choose manual number entry, you can update the number at any time.

The employee name and number appear together in people information windows, such as the People window and View Absence History window. In these windows you can select an employee by name or by employee number.

Employee Assignment Number

The employee assignment number uniquely identifies every assignment that exists within your Business Group. An employee can have one or more than one assignment, and therefore more than one assignment number.

The system automatically generates the assignment number, which is the same as the employee number by default. You can manually override the default assignment numbers the system generates. For example, you might want to use this number to store a payroll code.

If an employee has a second current assignment, the system also generates the second assignment number by default from the Employee Number, as in the following example:

Employee Name	Samantha Green
Employee Number	1012
1st Assignment Number	1012
2nd Assignment Number	1012–02

Person Types

In any enterprise there is a need to identify different groups of people. For each group that exists in your enterprise there may be different types of information you need to keep. You may also want to control access to the records of different groups of people.

There are three basic types of people for whom you maintain information in your human resource system. These are:

- Employees, both current and ex–employees
- Applicants, both current and ex–applicants
- External people

A special category of the External type is *contact*. A contact is someone associated with an employee or an applicant.

Contacts can include the following types of people: people who are dependents of employees, people whom employees name as beneficiaries of certain benefits, and people whom employees list as their contacts in case of emergency.

System and User Person Types

Oracle HRMS comes with a set of system person types. You can change the names of these types when you install the system, and you can add your own subgroups.

There are eight Person Types recognized by the system, and identified by a system name. For each, there is a predefined user name. You can change the predefined name and you can enter other user names.

Select one user name as the default for each system name. Oracle HRMS uses the default user name in certain circumstances. For example, when you hire an applicant, the system updates the Person Type to the default for Employee.

User Name	System Name	Default
Applicant	Applicant	Yes
Applicant and Ex–applicant	Applicant and Ex–applicant	Yes
Contact	External	Yes
External	External	No
Employee	Employee	Yes
Employee and Applicant	Employee and Applicant	Yes

User Name	System Name	Default
Ex–applicant	Ex–applicant	Yes
Ex–employee	Ex–employee	Yes
Ex–employee and Applicant	Ex–employee and Applicant	Yes

Oracle HRMS comes with a set of system person types. You can change the user names of these types when you install the system, and you can add your own user names, as subgroups of a system person type. For example, Oracle HRMS is installed with the system person type of employee, you might have three types of employee in your enterprise:

- Regular Employee
- Invalid Employee
- Contractor

You can define these as subgroups of the Employee person type to:

- enable fast identification of these groups
- manage different kinds of personal information for each group
- change employees from Contractor to Regular Employee, without changing current work information

Note: Each employee's assignment can be described by an *employment category* such as Full Time – Regular or Part Time – Temporary. So you do not use person types to distinguish the category of assignment.

In another example, you might want to distinguish between internal and external applicants for vacancies. You may also be involved in a redundancy program or a program of staff layoffs, and need to identify employees as preferred candidates for any vacancies. You can do this with the following subgroups of applicant:

- Internal Candidate
- External Candidate
- Preferred

Person Types and Information Management

The system uses its person types to control the type of information you can enter. For example, you cannot enter earnings or deductions for an applicant. You can use person types in the following ways:

- To control access to people's records on the system. For example, you may give all managers in a department access to employee records, but only give recruitment officers access to records of applicants and ex–employees.

Your system administrator can achieve this by creating customized versions of the People window.

See: Windows You Can Customize, *Customizing, Reporting and System Administration in Oracle HRMS*

- When you set up your own fields to hold additional information, you can tie them to particular person types. For example, you may want a user–defined field holding visa information for foreign workers to appear for employees and applicants, but not for other people.

  You can do this by setting up the descriptive flexfield on the People window.

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

Suggestion: If you want to define rules of eligibility for a compensation or benefits element based on the type of employee, you cannot use the person type directly. However, you can use person type in a *formula* to validate the values entered for an employee.

Also, consider whether you can meet your needs using the assignment status and employment category to control eligibility for compensation and benefits.

OAB User Person Types

In addition to system and user person types there are also OAB user person types. These are predefined in Oracle HRMS and automatically created when certain actions occur in Standard or Advanced benefits. For example, when an employee dies, a user type of surviving family member could be created or when the leaving reason of retiree is entered for an employee, the user person type of retiree is created.

The eight predefined person types are:

User Name	System Name
Retiree	Retiree
Former Spouse	Former Spouse
Surviving Family Member	Surviving Family Member
Surviving Spouse	Surviving Spouse

User Name	System Name
Former Family Member	Former Family Member
Beneficiary	Beneficiary
Dependent	Dependent
Participant	Participant

You cannot select any of the above person types, they are automatically created as part of your benefits administration. You can view the person types created using the Person Type Usage window.

Assignment Statuses

Statuses enable you to track the progress of your applicants and employees through your enterprise. If you use Oracle Payroll, they also control how the assignment is used during a payroll run. Oracle HRMS is installed with a number of predefined system statuses, for which you can set up multiple user statuses.

Primary Statuses

There are four system statuses for employee assignments:

- **Active Assignment**: Use this to show that the employee is working in accordance with his or her usual conditions of employment.
- **Suspend Assignment**: Use this to show that the employee is on leave of absence, but remains an employee of your enterprise.
- **Terminate Assignment**: Use this to show that your enterprise no longer employs the person in that assignment. It can still be possible to make payments through Oracle Payroll for assignments at this status.
- **End**: Use this to end any assignment except the primary assignment for an employee with multiple assignments. All payroll processing for the assignment is complete and the assignment has become a historical record. This status is not recorded on the assignment; it causes the assignment to end.

For information about system statuses for applicants see: Applicant Assignment Statuses: page 2 – 12.

Employee User Statuses

On your system, you can give these statuses different *user statuses* appropriate to your enterprise. Each system status can have several user statuses related to it. For example, for the system status Suspend Assignment, you could define the user statuses Paternity Leave, Disability Leave, or Education Leave. When you use Oracle HRMS, you only see the user statuses.

> **Note:** Each system status has a predefined user status of the same name.

Primary user statuses help you track the current employment circumstances of all your employees. You can also define secondary user statuses having no associated system statuses. You can use these for reporting purposes.

Note: The User Statuses you define provide the list of values for Status in the Assignment window for an employee. If you want to change any of the predefined default values you must overwrite the User Name.

Using Assignment Statuses to Control Compensation

When you define user statuses, consider how you will use them in reports, inquiries, and processing.

When you use a validation formula to validate entries to element input values, you can make the valid values for an entry dependent on the assignment status.

To use the statuses to control whether the payroll run processes an employee assignment, you choose a Payroll user status of Process or Do not Process for each user status. Additionally, in Oracle Payroll you can set up your pay calculation formulas so that a status change also changes the formula used to calculate the employee's pay. For example, an employee could receive half pay while on Military Leave.

Secondary Assignment Statuses

For analysis and reporting purposes, you can set up and use *secondary* assignment statuses, for both employee and applicant assignments. These statuses have no effect on assignment processing.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses for an employee assignment or an applicant assignment in the Secondary Statuses window.

To enter reasons for giving secondary statuses to assignments, define valid reasons as values for the Lookup Type EMP_SEC_ASSIGN_REASON (for employee assignments) and APL_SEC_ASSIGN_REASON (for applicant assignments).

Setup To Allow Processing After Termination

To enable payroll processing for employees after they leave your enterprise, in your system setup you must do the following:

- Set the Termination Rule to *Final* on the element definition of all elements you want to process after the actual leaving date.

If you use Oracle Payroll and have a Payroll responsibility, you can set the Termination Rule to *Last Standard Process* for elements whose entries should close down after the last normal payroll run. Set the Termination Rule to *Final* for elements you want to process as late payments after the last normal payroll run.

- Use the Assignment Statuses window to make sure your system has a user status that corresponds to:
  - the HR system status of *Terminate Assignment*
  - the Payroll system status of *Process*

  Your startup data includes the user status Terminate Process Assignment, which matches this definition. Use this status (or your own equivalent status) when you terminate employment or end an assignment.

Entering Personal Tax Information for an Employee (Tax Sign-Up)

You enter and maintain each employee's Personal Tax Information in the Tax Information window. This window will always display the Default Provincial Information for the employee. This information includes the Province of Employment (as defined in the assignment), and the Province of Residence.

The Tax Information window also has three tabbed regions in which you can enter data: Federal Tax Information, Provincial Tax Information, and Quebec Tax Information.

Default Provincial Information

Default Provincial Information appears in the Tax Information window. Both the Provinces of Employment and Residence are determined by the employee's work location and primary address as of the session date.

Tracking Employee Assignment Information

The NAIC override codes are maintained at the employee assignment level. This will override the NAIC defined at the GRE Organization level.

Special Information Types

Basic information is handled in a fairly standard way from enterprise to enterprise. However, other types of information are recorded and used in quite different ways. Examples include training records, disciplinary records, competence, and medical records. Oracle HRMS does not restrict you to any predefined format for holding this information. You can set up your own user–defined fields for recording, analyzing, and reporting on whatever special information you require.

In Oracle HRMS, you use the *Personal Analysis key flexfield* to define any special information not provided by the main system that you want to hold about people, jobs and positions, and training activities. Alternatively you can define Extra Information Types to record this information,

See: Extra Information Types (EITs), *Customizing, Reporting and System Administration in Oracle HRMS*

You can define any number of instances of the Personal Analysis key flexfield. Each instance is called a Special Information Type. For example, you might set up types to hold performance reviews or medical details. You can enter a person's information under these sorts of headings in the Special Information window.

Each Special Information Type can have up to thirty fields (where each field is a segment of the flexfield). You can set up cross–validation to ensure that users enter correct combinations of segments. You can also speed up data entry and minimize errors by defining an alias for common combinations of segment values.

When you enable special information types for your Business Group, you select how you plan to use each type. In Oracle Human Resources, you can use them for:

- Job requirements
- Position requirements
- Personal information

In Oracle Training Administration, you can use them for:

- Skills provided by training activities

See: Skills Information (Oracle Training Administration User's Guide)

Each Special Information Type can be used for one or more of these purposes. The options you select controls the windows in which each appears.

In Oracle Human Resources, you can also customize the windows that handle special information types to restrict them to just one Type, such as medical records. This is useful if you want to restrict access to particular types of information for security reasons, or to aid users' efficiency by giving them access to just the information they require for a particular task.

Defining Person Types

You can define your own names to identify the ’types’ of people in your system. These include all types of employees, applicants and contacts, as well as current and ’ex–’ types.

You can change these default names or define any number of new user types. For example, you might want to use Person Type to identify employees who are on a fixed term contract, or you might want to record Special Information for dependants of employees who are a special category of *External* Person Type.

One user name must be the default. This is the name the system enters in certain circumstances if you do not select a Person Type manually. For example, when you hire an applicant, the system automatically updates the Person Type to the default user name for the system name ’Employee’.

You enter user names for person types in the Person Types window.

▶ **To change a user name for a person type:**

- Delete the contents of the User Name field and type in your preferred name.

▶ **To map other user names to a person-type system name:**

1. Select New Record from the Edit menu.
2. Enter a unique user name, and select the system name you want to map on to.

Deactivating User Names

You cannot delete user names in use in the system, but you can deactivate them by unchecking the Active check box. Deactivating a person type prevents you from selecting it in the People window. Notice that you cannot deactivate a default User Name. You must first select another user name as the default.

Defining Assignment Statuses

You define both primary and secondary user statuses. In the Assignment Statuses window you can define these statuses for both employee and applicant assignments.

Defining Primary User Statuses

▶ **To rename a user status:**

- Delete the contents of the User Status field and type in your preferred name.

▶ **To supply additional user statuses for a system status:**

1. Select New Record from the Edit menu.
2. Type in your user status, and select a Human Resource system status.
3. For employee assignment statuses, you must also select a Payroll system status. You must do this, even if you do not have Oracle Payroll. If you have Oracle Payroll, the payroll system status controls whether payroll processes the assignment in a payroll run.
4. Save the new status.

   Note: For each system status, you must have one default user status. The system automatically uses the default in certain situations. For example, when you create a new employee assignment, it automatically has the default user status corresponding to the system status Active Assignment. You can override this default.

You cannot delete a user status, but you can prevent its use by deactivating it. To deactivate a user status, uncheck the Active check box.

Defining Secondary Statuses

A user status associated with a system status is called a *primary* status because it determines how the system processes the assignment. You can also define *secondary* statuses not associated with a system status. You use secondary statuses for analysis and reporting, but not to control pay processing for assignments.

▶ **To create a secondary status:**

1. Select New Record from the Edit menu in the Assignment Statuses window.

2. Type in a user status and do not select a system status.

   The Type field displays *Secondary*.

Enabling Special Information Types

Use the Special Information Types window to enable special information types for the Business Group, and to select how you want to use them.

▶ **To enable Special Information Types:**

1. Select the special information types you want to use in your Business Group.
2. Enable each type by checking the Enabled check box.
3. Check the other boxes to specify how you plan to use the special information type. This makes it available in the list of values in other windows as follows:
   - **Job**: in the Job Requirements window
   - **Position**: in the Position Requirements window
   - **Other**: in the Special Information window
   - **Skill**: in the Skill Provisions and Search for Event windows in Oracle Training Administration

   The OSHA and ADA check boxes are for US users only.

Entering an Assignment

When you hire an employee, Oracle HRMS automatically creates a default assignment for that employee. You can view an employee's assignments in the Assignment window.

You can then enter additional assignments for an employee, if required. Enter additional assignments using the Assignment window.

▶ **To enter an assignment:**

1. Set your effective date to the start date of the new assignment.
2. Select the organization to which you want to assign the employee.

   By default, the employee has an assignment either to the Business Group organization, or to the organization to which he or she was an applicant.

   ☞ **Attention:** If you overwrite a new employee's default assignment to an organization, a window appears asking if the change is an update or a correction. Select Correction.
3. Select the job or position for which this person has been assigned.

   If you are creating an additional assignment, no default business Group or organization is displayed.
4. Select any other components included in this employee's assignment (groups and employment category, for example full or part time).
5. Select a grade for information or to use grade rates or grade scales to determine the appropriate compensation level for the employee.
6. If a location is defined for the Business Group or other organization, it appears as a default. Change this, if required.
7. Select a Status for the assignment. By default a new assignment has the status Active Assignment (or an equivalent user status defined on your system).

   See: Assignment Statuses: page 1 – 25
8. Enter an Assignment Number to uniquely identify the assignment. By default, this number is the same as the Employee Number, for the employee's first assignment.
9. Enter the information you want to hold in the tabbed regions, for example, supervisor details, special ceiling progression points or salary information.

   Note: You must associate all employee assignments (except any unpaid voluntary assignments) with a GRE, using the tabbed region GREs and Other Data.

Finding a Person Using the Find Person Window

When you navigate to the People window, the Find Person window automatically displays in front of it.

▶ **To query a person using the Find Person window:**

1. Do one or both of the following:
   - Enter a full or partial query on the person's name. Where a prefix has been defined for the person, a full name query should be in the format 'Maddox, Miss Julie'.
   - If relevant, enter a query on employee number, applicant number or national identifier (such as social security number.)
2. Choose the Find button.

   The person or people found by the query are displayed in the People window. If the query found more than one person, you can use the [Down Arrow] key or choose Next Record from the Go menu to display the next person.

Entering a New Person

Use the People window to enter and maintain basic personal information for all person types, including employees.

The minimum information to enter for all categories of people is name and type. In addition, for employees you must enter gender, employee number and date of birth (for assignment to a payroll). All other personal information is optional.

▶ **To enter a new person:**

1. Set your effective date to the appropriate date for adding the person to the system. If you are entering an employee, this should be his or her hire date.
2. Enter the person's name and other details in the Name region.

   Only the last name is required.

   - You can use the Title field to enter a title such as Mrs. or Doctor for the person.
   - You can use the Prefix field to enter the first part of the person's name, such as van der. In the case of someone whose last name is van der Zee, this enables you to sort by the last word of the name, that is Zee. If the whole name van der Zee is entered in the Last Name field, the name is sorted under van.
   - You can use the Suffix field to hold part of the last name, such as Junior or II. This enables the suffix to be reported on separately, as required in some government–mandated reports.
3. Enter their gender.
4. Select a type, such as employee, applicant or contact.
5. If necessary, change the Latest Hire Date and Date First Hired fields.

   - The Latest Hire Date field displays your effective date.
   - For employees who have previously worked for your enterprise or agency, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.

   If the latest hire date and the date first hired are the same, when you amend the latest hire date, the date first hired is set to the same date.

   If you amend the latest hire date to earlier than the date first hired, the date first hired is set to the same date.

Note: Before making a change to a latest hire date already entered for an employee, ensure that the start date of the employee's primary address is the same as or earlier than the new hire date. This preserves the integrity of the employee's tax records.

6. Enter the person's identification information in the Identification region:
   - Enter the .Social Insurance Number.
   - If your enterprise uses manual number entry, use the Employee or Applicant fields to enter an employee or applicant number. If your enterprise uses automatic number generation, the employee or applicant number automatically displays when you save your entries in this window.
7. Enter details for the person as required in the Personal tabbed region:
   - To assign an employee to a payroll, you must enter his or her date of birth.
   - If the Work Telephone field is displayed, enter the person's work telephone number. Otherwise, use the Phone Numbers window to enter this information.
   - In the Mail To field, select Home or Office to indicate the person's preferred mail destination.
   - In the Date Last Verified field, you can enter the date the person last checked this personal information for accuracy.
   - In the Status field, select the person's marital status.
   - In the Email field, enter the person's email ID.
   - In the Registered Disabled field, you can register whether your employee or applicant is disabled.

What Next?

Optionally, you can enter additional information for people in the tabbed regions. See: Entering Additional Personal Information: page 1 – 43

Note: The Background Information, Medical Information and Rehire Information tabbed regions appear only if your system administrator has enabled them for you.

Entering People's Addresses

All employees must have only one primary address on record at any point in time, but can have an unlimited number of secondary addresses (such as Summer or Weekend).

Enter the primary and secondary addresses for employees and their contacts using the Address window. This window permits you to select address styles appropriate for Canada and the US.

The Address window performs standard validation of field entries (for example, for postal code length). At sites with a licensing agreement with Vertex Inc., special validation is performed (for example, matching of city to province and postal code).

For more information on Vertex Inc., contact your support representative.

> **Note:** Oracle Payroll includes a licensing agreement with Vertex Inc.

Prerequisite

❑ Set up the address types you require, such as Summer or Weekend, as Lookups for the Lookup Type ADDRESS_TYPE.

See: Adding Lookup Types and Values: *Oracle Human Resources North American User's Guide*

▶ To enter an Address:

1. In the Style field the default national address style will appear. If this style is appropriate you may enter the address by placing the cursor in the Address field. If the default national address style is not appropriate, select the appropriate national address style from the List of Values. This will open the appropriate address form for the country you select.

   Note: Default address styles are predefined for many countries. You can change these defaults and can create address styles for other countries.

2. Enter address information in this window and choose the OK button to return to the Assignment window.

   The first address entered for someone is by default, the primary address. Employees must have only one primary address at all times, but can have any number of secondary addresses. However, they cannot have two secondary addresses with the same name at the same time.

3. Select an address type, such as Summer or Weekend.
4. To identify the person's main address, check Primary.

Entering Identification and Employment Information for an Employee

Employee information such as Social Insurance Number and employee number is maintained within the Identification region of the People window.

To enter additional employment information such as work permit number you can select the Employment Information tabbed region in the People window.

▶ **To enter Identification and Employment Information for an employee:**

1. In the Identification region, enter the employee's Social Insurance Number. Enter an employee number in the Employee field, unless this number is automatically generated by the system for you.
2. If the employee has a work permit, select the Employment Information tabbed region and enter the information into the appropriate fields.
3. Save your work.

Entering Additional Personal Information

Optionally, you can enter additional information for people in the tabbed regions of the People window described in the following steps.

> **Note:** The Background Information, Medical Information, Benefits Information and Rehire Information tabbed regions appear only if your system administrator has enabled them for you.

▶ **To enter office location information for a new hire or an existing employee:**

1. Choose the Office Location tabbed region.
2. Enter the office number for this office.
3. Enter the internal location of this office.
4. Enter the office identifier for internal mail.

▶ **To enter information for an applicant:**

1. Choose the Applicant tabbed region.
2. If the applicant's resume is on file, check the Exists check box.
3. If the applicant's resume is on file, select the date indicating when the resume was last updated.
4. Select a final date a file is to be maintained for this applicant.

▶ **To enter information concerning the background check for an employee:**

1. Choose the Background tabbed region.
2. Check whether the employee's background check has been performed.
3. Select the date the background check was performed.

▶ **To enter rehire recommendation information for an applicant who was a former employee:**

1. Choose the Rehire tabbed region.
2. Check whether the former manager has recommended the applicant for rehire.
3. Select the reason for this recommendation.

▶ **To enter further name information:**

1. Choose the Further Name tabbed region.

2. Enter one or more honors/degrees (BA, MBA or JD, for example) that the employee has earned.
3. Enter the name (perhaps a nickname) by which the employee prefers to be known.
4. If the employee was previously known by a different name, enter the previous last name.

▶ **To enter medical information for an employee:**

1. Choose the Medical tabbed region.
2. Select the employee's blood type.
3. Select the date of this employee's last medical test.
4. Enter the name of the physician who performed this test.

▶ **To enter other information for a person:**

1. Choose the Other tabbed region.
2. Select the type of schedule in the Availability/Schedule field; for example, the days of the week your employee works.
3. Select the current status of the student, if your employee is a student.
4. Enter the person's current full time/part time availability to work with your company.
5. Select the language the person prefers for correspondence.

   This language can differ from the person's native language, depending on the nature of the correspondence.
6. If the employee has died, enter the date of death.

   If you enter the termination reason of deceased and the actual termination date on the Terminate window and date of death has not been entered, it is set to the employee's termination date.
7. Check the Military Service check box if the person is employed in a military service in some capacity.

   The value of this field can impact benefits calculations.
8. Check the Second Passport Exists check box if the person possesses multiple passports.

▶ **To enter benefits information:**

1. Choose the Benefits tabbed region.

2. Enter a benefit group for your employee or applicant. Benefit groups are used to determine a person's eligibility for a plan or for setting benefit rates. For example, benefit groups can be used for mergers and acquisitions where eligibility is complicated. They can also be used where a person is grandfathered into a very old plan.
3. Enter what kind of tobacco your employee uses, if any. For example, cigarettes, pipe, cigar or chewing. This is used within benefits to determine the eligibility and rates for particular plans.
4. Enter medical plan number. This is the policy or group plan number of an externally provided medical plan. This is used to determine eligibility to participate in some plans.
5. Enter the adoption date, if the employee whose record you are updating has adopted a child. This information, with the child's date of birth, is used to determine whether a dependant is covered by a plan. You can only enter the adoption date if you have entered a date of birth for the person. The adoption date must be greater or equal to the date of birth.
6. Enter the date you received the death certificate, if your employee has died. You can only enter this once you have entered the date of death in the Other Information region. The receipt of the death certificate must be after or equal to the date of death.
7. Enter an adjusted service date for your employee. This date is used within benefits, in place of the date first hired, to determine the length of service for eligibility, enrollment and rates. The adjusted service date may be used to credit service for former employers, grand–fathered benefits or in the case of mergers and acquisitions.
8. Check the Other Coverage checkbox, if your employee or applicant has externally provided coverage. This determines a person eligibility for certain plans.
9. Check the Voluntary Service checkbox, if your employee or applicant is volunteering, for example as a missionary. This determines eligibility to continue or receive coverage from certain plans.

Designated Group Information

Designated group information, used to create the Employment Equity Report, may be kept for each employee in your organization.

Due to the confidential nature of this information a user must have specific security responsibility to view the Designated Groups region on the People window.

▶ To enter Designated Group information for an employee:

1. Select the Designated Groups tabbed region.
2. Indicate what group(s) the employee belongs to.
3. Save your work.

Deleting a Person from the System

If you mistakenly save information in the People window, you can remove the person by selecting Delete Record from the Edit menu. You are prevented from performing this action if you have entered information about that person in other windows.

If you want to remove all records of a person, use the Delete Person window. However, you cannot use this window to remove the records of an employee or ex–employee whom Oracle Payroll processed in any payroll runs.

Contacts

When you delete a person from the system anybody entered as a contact is also deleted if:

- The contact only has basic details set up.
- The contact is not used by another person.

If the contact is used by another person or has other information set up (for example, assignment or applicant information) the contact is not deleted. However, Oracle HRMS removes the record of their relationship to the deleted person.

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

▶ To delete all records of a person:

■ Query the person in the Delete Person window and choose the Delete Person button.

Entering Next of Kin and Other Contacts

Use the Contact window to hold information about contacts, for example:

- People to contact in an emergency.
- Dependents.
- Beneficiaries of benefits such as insurance policies or stock purchase plans.
- Individuals receiving payment of a wage attachment/third party payment deducted from the employee's salary.

A person entered as a contact can be one, some, or all of the above.

You can also set up the same relationship more than once between the same two people. However, these relationships must not occur in the same time period. For example, you can set up that Person A married Person B from 01–Jan–1990 to 01–Feb–1991. Person A could then marry Person B again, starting from the 02–Feb–1991. However, you cannot enter that the couple remarried on 01–Jan–1991, as this would mean that they were married twice in the same time period.

▶ **To enter a contact:**

1. Do one of the following:
   - Enter the name of a new person.
   - Select from a list of people already entered on the system.
2. If you enter a new person:
   - enter their gender and date of birth.
   - select the user person type.

     You can only select user person types which are set up for the system person type of Other, for example contact.
3. Enter details about the different contacts for your employee in the Contact Relationship fields.

▶ **To enter contact relationships:**

1. Enter contact relationship, for example child or spouse.
2. Enter the start and end date (if known) of the relationship
3. If you use Oracle Advanced Benefits or Standard Benefits, enter a start and end reason for the relationship.
4. Select whether the contact:

- Is the primary contact.
- Is the recipient of a third party payment (for example, from a court–ordered deduction / wage attachment).

  This enables you to select this person on the Personal Payment Method window when entering a third party payment method for the employee.
- Shares the same residence as the employee.
- Has a personal relationship with the employee. This identifies whether the third party should be considered as a possible dependant and / or beneficiary.
- Is a beneficiary or dependant. You can only enter these fields if you do not use Standard or Advanced benefits.

5. You can enter a sequence number for the contact relationship. This must be a unique number for each contact the employee has. However, because sequence numbers are employee based, these numbers only need to be unique within the employee's record.

   For example, Person A has a relationship type of spouse with Person B. This is given the sequence number of 1. Person A also has a relationship type of father to Person C. This is given the sequence number of 2.

   Person A also has a relationship type of emergency contact with Person B. This must also have the sequence number of 1 as a relationship between these two people is already recorded against Person A.

   Person B is also an employee and therefore has her own set of contacts recorded against her. She has a relationship type of spouse with Person A. However, this relationship does not have to have the same sequence number as the relationship recorded against Person A, that is, this relationship has a sequence number of 5.

6. Select whether you want to create a mirror relationship and enter the mirror relationship type.

   Attention: You can only enter a mirror relationship and type when you first create the contact. Once the mirror relationship is saved, the relationships are maintained independently of each other, except for mirror relationships that are created automatically.

   Oracle HRMS automatically creates a mirror relationships when you enter a spouse, parent or child. For example, if you create the spouse relationship from person A to person B, when you query person B in the Contact window, a mirror relationship of spouse to person A is automatically created.

Furthermore, if you update a relationship that has had a mirror relationship automatically created, the mirror is also updated accordingly. For example, if you end date the relationship of spouse for person A, the spouse relationship for person B is also ended. If the relationship type is changed the relationships become independent.

What Next?

Save your work. If you want to enter addresses for the contact, choose the Address button.

Entering Canadian Bank Details for an Employee

For employees with direct deposit, you must enter bank detail information. Canadian bank detail information includes Bank Name, Transit Code, Account Number, Account Name and Account Type.

You enter Canadian bank details for an employee in the CA Bank Details window.

> **Note:** This window can be accessed from the employee's Assignment, by selecting the Others button and choosing Pay Method. The Bank Details field will take you to the CA Bank Details form.

See: Entering Payment Methods for an Employee Assignment: *Oracle Human Resources North American User's Guide*

▶ **To enter Canadian bank details for an employee:**

1. In the Account Name field, enter a description for the account.

   An example of a typical account name would be "Account #1" or "Direct deposit".

2. In the Account Type field, select the appropriate account type from the List of Values.
3. Enter the appropriate numbers in the Account Number, Transit Code and Bank Number fields.
4. Enter a description for the bank name and branch in the Bank Name and Bank Branch fields.
5. Save your work.

Adding a City for Addresses

A US or Canadian city or town with a population of less than 250 may not exist in the Oracle HRMS. Before entering the address of someone living in a city or town not in the database, you must add the city or town using the Cities window.

1. In the State Name field, select the name of the state or territory in which the city is located. For Canadian cities, select Canada in this field.
2. In the County name field, select the county in which the city is located. For Canadian cities, select the province in which the city is located.
3. Enter the city name in the City Name field.
4. If there is a single zip or post code for the city, enter it in the Zip Start field and leave the Zip End field blank.
5. If a range of zip or post codes applies to the city, enter the first code of the range in the Zip Start field, and the last code of the range in the Zip End field.
6. Save your work.

Adding Telephone Information

You can enter multiple telephone numbers for people in the HRMS database. To enter telephone information for a person, use the Phone Numbers window.

▶ **To enter a telephone number:**

1. In the Type field, select the type of the telephone device. For example, Office, Home or Fax.
2. In the Phone Number field, enter the telephone number.

   Any format is allowed.
3. In the From field, select the start date for the telephone number.
4. In the To field, optionally select the date when the telephone number is no longer valid.
5. In North America, optionally add the extension number in the last field.
6. Save your work.

   Note: If you want to maintain a history of telephone numbers for this person, be sure to add a new entry for the new telephone number and enter an end date for the existing existing telephone number. If you do not want to maintain such a history, simply change the information for the existing telephone number.

Entering Pictures

You can store a picture associated with each person on your system, perhaps holding a photograph or digitized image of the person's signature. These may be useful for approval or identification purposes. You must digitize the image and save it in one of the following file formats:

- BMP
- JFIF
- JPEG
- PCX
- PICT
- TIFF

You enter pictures in Oracle HRMS in the Picture window.

▶ **To enter a person's picture in Oracle HRMS:**

1. In the Picture window, choose the Load Picture button.
2. Enter the file path to locate the directory in which you saved the graphic file.
3. Highlight the filename and choose the OK button. The graphic is loaded in the format indicated by the filename. For example, a file called image.bmp would be loaded as a BMP file.

Creating a Competence Profile

Use the Competence Profile window to create and update a personal competence profile.

When you open this window, you will see all competencies, past and present, held by the person. If you want to see only current competencies and proficiency levels, check the Current Competencies box.

▶ **To create a competence profile:**

1. Select the first competence this person possesses.

   You can also automatically enter all competencies required for the person's primary assignment or a vacancy, or the enterprise's core competencies. See: To copy competencies from requirements: page 1 – 55

2. Select the proficiency level at which the person performs the competence.
3. Enter the date from which the person possesses the competence at this level. For example, if the person gained the competence through a qualification, enter the date the qualification was gained. You can enter a date when the competence expires, if required.
4. In the Source of Proficiency Rating field, you can select the method by which the person gained the competence, such as training course or previous experience.
5. Select the method of certifying that the person attained the competence at the recorded level, such as by examination.
6. Enter the date when the person's proficiency in this competence should be reviewed.
7. Continue to enter the competencies the person possesses, then save your changes.

▶ **To copy competencies from requirements:**

1. Choose the Copy Competencies button. A Copy Competencies window appears.
2. Do one of the following:
   - Check the Core Competencies box to copy all the competencies required throughout your enterprise.
   - Check the Primary Assignment Competencies box to copy all the competencies required in the organization, job and position to which the person is assigned.

- Select a vacancy to copy all the competencies required in the organization, job and position for which the vacancy is defined.

3. Enter the dates between which the competencies are valid (you must have a From date, but you can leave the To date blank).
4. Choose the Copy button.

   You can now enter proficiency levels, certification methods, and so on for each of these competencies held by the person.

▶ To update a competence profile:

1. Check the current check box if you want to see only the current competencies the person possesses, otherwise leave this box blank.
2. Enter new competencies for this person, or update proficiency levels and other details for existing competencies.

   > **Note:** If you update a proficiency level, enter the date when the new level was attained. Then, when you save your changes, you will see that the system keeps a record of the old proficiency level, ending the day before the start date of the new level.

3. Save your changes.

Entering Qualifications

You can enter an employee's qualifications when they first join the enterprise, and then update them after periodic assessments or appraisals or after completion of a training course.

Use the Qualifications window, accessed from the People window, to enter and update qualifications.

▶ **To enter qualifications:**

1. Select the type of qualification this person possesses and the title of the qualification.

   If you need to set up additional qualification types see: Creating Qualification Types: page 3 – 55

2. Select the status of the qualification, for example, whether training is ongoing or completed.
3. Enter the grade at which the person holds the qualification, if appropriate.
4. Select the establishment at which the person gained the qualification.

   If you need to set up additional establishments see: Entering Schools and Colleges Attended: page 1 – 59

5. Optionally, enter the awarding body that bestowed the qualification.
6. Enter the dates between which the qualification is gained. You must enter a Start date but you can leave the End date blank (if the qualification is still incomplete).
7. Optionally, enter the date the qualification was awarded.
8. Enter the projected completion date the qualification is awarded, if relevant.
9. Enter the ranked position within the class, if relevant.
10. Optionally, enter any comments, for example, what percentage of the award was course work or examination.
11. Save your work.

▶ **To enter tuition fees for reimbursement:**

1. In the Tuition Details tabbed region, enter the amount and select the currency to reimburse the person.
2. Select the method of tuition, for example, day release.

3. Enter the method of reimbursement, for example, bank transfer to be paid when qualification is awarded.
4. Save your changes.

▶ To enter training details:

1. Choose the Training Details tabbed region.
2. Enter the amount of training completed. For example, enter 30 days completed of a training program that lasts 60 days.
3. Enter the total amount of training required to deliver the qualification.
4. Enter the units in which the training is measured, for example, days.

▶ To enter license details:

1. Choose the License Details tabbed region.
2. Enter the license number, for example, a driving license number.
3. Enter any restrictions, for example, license not valid in certain states.
4. Enter the license expiry date.

▶ To enter subjects:

1. Enter the first subject the qualification comprises.
2. Select the status at which the subject is awarded, for example, whether training in the subject is ongoing.
3. Enter the dates between which the subject is studied. You must enter a Start date but you can leave the End date blank (if the subject is still incomplete).
4. If the subject forms a major part of the qualification, check the Major box.
5. Optionally, enter the grade at which the subject is studied.
6. Continue to enter further subjects until you have entered them all for the qualification, then save your changes.

Entering Schools and Colleges Attended

You can enter the school or college at which the person gained a qualification.

Use the School and College Attendances window, accessed from the People window, to enter attendance at an establishment.

▶ **To enter schools and colleges attended:**

1. Select the name of the school or college that the person attended.
2. Enter the dates of the attendance. You must enter a Start date but you can leave the End date blank (if the attendance is ongoing).
3. If attendance is full time at the school or college, check the Full Time box.
4. Continue to enter schools or colleges, if required, then save your changes.

Entering Contracts

You can record attributes of your employee's contracts to be used for reporting purposes. Information relating to the contract reference, contract status, and contract type must all be entered.

Once a contract is entered for a person you can refer an assignment to it using the Assignment window. Each person may have multiple contracts, but an assignment may refer only to one contract.

There are a number of rules that relate to the creation and maintenance of contracts:

- A contract cannot exist without a person. Therefore, if a person who has a contract attached to them is deleted, the contract will also be deleted.
- Contract statuses are set up depending on the needs of your enterprise. If you have any queries about contract statuses, please contact your system administrator.
- If the alteration of a hire date for an employee results in the start date for the contract being before the hire date, the contract start date is automatically amended to the new hire date.

  Note: If the alteration of a hire date results in future–dated changes being before the contract start date, the changes are deleted.
- If the alteration of a hire date for an employee results in the start date for the contract being after the start date of the referencing assignment, the contract start date is automatically amended to the new hire date.
- A contract cannot be deleted if an assignment currently refers to it, irrespective of the assignment status.
- When you are selecting a contract to reference to an assignment you will only be able to select from contracts that have start dates on or before the assignment start date.

▶ **To enter a new contract:**

1. Set your effective date to the start date of the contract.
2. Enter the reference code for the contract. The code for each contract attached to a person must be different, though more than one person can use the same contract reference code.
3. Select the status that indicates the contract is active. The period of service dates will also be displayed if a corresponding period of service exists.

4. Select the contract type.
5. You can enter any remaining information relating to the contract such as start reason, duration, or contractual job title.
6. Save your changes.

   You can attach an electronic copy of any written contract that accompanies the record using the Attachments button.

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

Maintaining Contracts

The amendments made to a contract are datetracked. The result of any changes made to the status of a contract is dependent on whether the record is being corrected or updated. For example:

- If you change the status of an active contract to make it inactive, and choose the Update button, the contract record will be ended. A new contract record with an inactive status will be created and the fields in the Active Contracts Dates region will become blank.
- If you change the status of an active contract to make it inactive and choose the Correction button, the current contract record will be amended to appear as if the most recent active period has never occurred.

Deleting Contracts

If you mistakenly save information in the Contracts window you can delete it. You cannot performing this action if the contract is referenced by an assignment.

Note: Contracts cannot be date effectively end dated.

▶ To delete a contract:

1. Query the contract in the Contract window.
2. Select Delete Record from the Edit menu and proceed as instructed in the displayed windows.

Entering Special Information

Basic personal information is handled in a fairly standard way from enterprise to enterprise. However, other types of information are recorded and used in quite different ways. Examples include training records, disciplinary records and medical records. Enter this type of information in the Special Information window.

Note: Your system administrator can create customized versions of the Special Information window, for entry of information for only one or a selected set of information types.

▶ **To enter special information for a person:**

1. In the Name field, select the type of information you want to enter for the person.
2. In the Details block, click in the Detail field to open a window for entering information of this type.
3. Choose the OK button when you have completed your entries, then save your work.

Entering Communication Delivery Methods

Within your enterprise you can contact your employees and applicants in a number of ways. For example, you could use E–Mail, Voice Mail, Fax or Post. Using the Communications Delivery Method window you can enter the different methods of contacting a person and indicate the method they prefer.

▶ **To enter a communication delivery method for a person:**

1. Enter the methods of delivering information in the Delivery Method field. You can enter as many communication delivery methods as necessary.
2. Optionally, enter the period the delivery method is valid using the start and end dates. Otherwise, the start date is the effective date and the end date is not set.
3. Select a preferred communication delivery method, if your employee or enterprise prefers a particular form of communication. Each employee or applicant can only have one preferred communication delivery method.
4. Save the communication delivery methods for your employee or applicant.

Federal Tax Information

You enter an employee's Federal Tax Information in the Federal Tax Information tabbed region of the Tax Information window.

▶ **To enter Federal Tax Information for an employee:**

1. Verify that the TD1 information is correct. If TD1-X information is required select Commission as the calculation method and enter appropriate values in the TD1-X information region.

   Note: The Basic Federal Exemption amount will default for the given calendar year, and will be updated every year. If you uncheck the Basic Exemption Flag you must manually enter a value into the Tax Credit field.

2. In the Tax Exempt region, you may select any statutory deductions the employee is exempt from.
3. Enter any required information into the Income Tax region.
4. Save your work.

Provincial Tax Information (Except Quebec)

You enter an employee's Provincial Tax Information in the Provincial Tax Information tabbed region of the Tax Information window. If you have information for Quebec employees, it should be entered in the Quebec Tax Information tabbed region.

▶ **To enter Provincial Tax Information for an employee:**

1. Select the Provincial Tax Information tabbed region.
2. Select the province of employment in the Province field.

   Note: You cannot enter tax information for Quebec in this window. Select the Quebec Tax Information tabbed region to enter Quebec specific tax information.
3. In the Tax Exempt region, you may select any statutory deductions the employee is exempt from.
4. If appropriate, in the Additional Information region, indicate the number of dependants the employee has, and if the employee is married/equivalent, a non-resident, or has disability status.
5. Save your work.

Quebec Tax Information

If an employee's province of employment is Quebec, you enter provincial tax information in the Quebec Tax Information tabbed region of the Tax Information window.

▶ **To enter Quebec Tax Information for an employee:**

1. Verify that the TP-1015-3 information is correct. If TP-1015.R.13.1 information is required, select Commission as the calculation method and enter appropriate values in the TP-1015.R.13.1 region.

   Note: The Basic Provincial Exemption amount will default for the given calendar year, and will be updated annually. If you uncheck Basic Exemption Flag you must manually enter a value into the Tax Credit field.

2. In the Tax Exempt region, you may select any statutory deductions the employee may be exempt from.
3. Enter any required information into the Income Tax region.
4. Save your work.

Running the Full Personal Details Report Set

To create printed reports of the personal information held for one person, you can run the Full Personal Details report set. It comprises four reports that meet employees' rights to view their own personal details under data protection legislation:

- Full Person Details 1 reports on addresses and information entered in the People window, such as name, date of birth, nationality, and work telephone number.
- Full Person Details 2 reports on applications and applicant interviews.
- Full Person Details 3 reports on assignment information including periods of service, payment methods, and element entries.
- Full Person Details 4 reports on miscellaneous work information, including special information, absences, recruitment activities, and contacts.

If you do not need to see all this information for the employee, you can run individual reports rather than the report set. The Full Person Details report, Full Assignment Details report, and Full Work Details report are equivalent to reports 1, 3, and 4 in the report set, respectively. The Full Applicant Details report is equivalent to report 2 in the report set, but you can only run this as a separate report for an applicant, not an employee.

You run report sets from the Submit Request Set window.

▶ **To run the Full Personal Details report set:**

1. In the Request Set field, select Full Personal Details.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the reports.
4. Enter the name of the person for whom you want to print the reports.
5. Choose the Submit Request button.

Entering Additional Employment Information

Just as you can record additional information about people, such as their addresses, contacts, and skills, you can also record additional information associated with each employee assignment. The main items of information are as follows:

- You can propose or approve a salary change in the Salary Administration window.

  See: Entering Salary for a New Employee (or One Assigned to a New Salary Basis), *Managing Compensation and Benefits Using Oracle HRMS*

- You can make entries to the earnings, deductions, benefits and other elements the employee is eligible for, using the Element Entries window.

  See: Making Manual Element Entries, *Managing Compensation and Benefits Using Oracle HRMS*

- If you use a pay scale and progression point system, you can place the assignment on a pay scale using the Grade Step Placement window.

  See: Placing an Employee on a Grade Step, *Using Oracle HRMS – The Fundamentals*

- You can select the cost centers or accounts to which the costs of the assignment should be allocated, using the Costing window.

  See: Data Costed at the Organization and Assignment Levels, *Using Oracle HRMS – The Fundamentals*

- You can use the Assignment Budget Values window to specify the value of the assignment in terms of headcount, full time equivalent (FTE), or any other budgets you have defined.

  See: Budgeting Overview: page 4 – 3

- For employees who have assignments to payrolls, you can select the methods by which the employee wants to receive pay for this assignment in the Personal Payment Method window.

  See: Entering Payment Methods for an Employee Assignment: page 1 – 76

- You can enter secondary assignment statuses for analysis and reporting, if these have been defined on your system.

  See: Entering Secondary Assignment Statuses: page 1 – 75

- You can enter extra information about your employee’s assignment using the Extra Assignment Information window.

Entering Additional Assignment Details

Once you have set up your employee's basic assignment details, you can enter additional information in the tabbed regions of the Assignment window, for example, supervisor details, special ceiling progression points or salary information.

> **Note:** You must associate all employee assignments (except any unpaid voluntary assignments) with a GRE, using the tabbed region GREs and Other Data.

Entering GREs and Other Information

Use the GREs and Other Data tabbed region to place the employee assignment in a GRE, and enter other information.

▶ **To enter GREs and other information:**

1. Select the GRE (Government Reporting Entity) for the assignment.
2. If the employee must submit a timecard, select Yes in the Timecard Required field and select the name of the employee approving the timecard.
3. You can select a work schedule for the assignment. This field may display a default work schedule for the employee's organization.
4. If this employee assignment is for shift work, select the shift regularly worked.
5. You can enter the spouse's salary, which can be a state requirement for married couples to qualify for reduced rates if they are filing jointly.
6. Select Yes in the Legal Representative field if you send earnings information for this employee to his or her legal representative. A legal representative can be, for example, the employee's custodian, parent, or attorney.

Entering Supervisory Information

▶ **To enter supervisory information:**

1. Choose the Supervisor tabbed region.
2. Select the name and employee number of the employee's personal supervisor.

   > **Note:** This information shows the personal supervisor for an employee and is not updated by the system. Use organization and position hierarchies to show management reporting lines.

Entering Probation Period and Standard Conditions Information

The probation period and standard work day information (apart from the Hourly/Salaried field) defaults from the employee's position. If standard conditions are not defined for the position, they default from the employee's organization or Business Group.

▶ **To enter probation period and standard conditions information:**

1. Choose the Probation Period tabbed region.
2. Amend the default probation period and standard work day information for your employee's assignment, if required.
3. Choose the Standard Conditions tabbed region.
4. For benefit administration, enter whether your employee's assignment is hourly or salaried. Benefits are often based on whether a person is paid hourly or receives a salary.

    Note: If you are setting up benefits based on salaried or hourly pay you must set up Hour/Salaried field in addition to the Pay Basis. The Pay Basis identifies how pay is quoted within Salary Administration and enables an employee to have their pay quoted as hourly, but be paid a salary. Therefore, for benefits, you need to set up whether your employee is paid hourly or receives a salary.

Entering Primary or Secondary Assignment and Miscellaneous Information

▶ **To enter primary or secondary assignment and miscellaneous information:**

1. Enter the internal address details (such as the floor or office number), if required. The system adds the details to the location address.
2. Select a reason for adding or changing the assignment, if required. You define valid reasons as values for the Lookup Type EMP_ASSIGN_REASON.
3. Check the Manager check box if the assignment is at manager level.

Primary or Secondary Assignment

By default, the first assignment entered for an employee is the primary assignment, and the Primary box is automatically checked. If you are now entering a secondary assignment, the Primary box is automatically unchecked. You can leave the Primary box as it is.

▶ **To change primary assignments**

1. On the assignment that now the primary one, check the Primary box. The system automatically changes the previous assignment from primary to secondary.
2. Query the assignment details to see the changes.

Entering Special Ceiling Information

A special ceiling progression point is the highest point the Increment Progression Points process can automatically progress the employee.

▶ **To enter special ceiling information:**

- Enter a special ceiling if the employee is assigned to a grade, and a grade scale is defined for this grade. This special ceiling overrides the ceiling defined for the grade scale.

Entering Salary Information

Using the Salary Administration window, you can enter a proposed salary change for an employee, associate this change with a performance review, and accept or revise the change later. To administer an employee's salary in this way, you first assign the employee to a salary basis in the Salary Information region.

▶ **To enter salary information:**

1. Choose the Salary Information tabbed region.
2. Select a salary basis for the employee.
3. You can also enter the frequency of salary and performance reviews.

☞ **Attention:** If you change an employee's salary basis to a basis that uses a different salary element, the employee's existing salary element entry will be ended. Using the Salary Administration window, you should make a new salary entry for the employee, effective from the date of the salary basis change.

For further details about salary administration refer to Salary Administration and Performance Reviews, *Managing Compensation and Benefits Using Oracle HRMS.*

For more details about the additional information you can enter refer to Additional Employment Information: page 1 – 68

Entering Bargaining Unit and Union Membership Information

▶ **To enter bargaining unit and union membership information:**

1. Enter a bargaining unit code for your employee's assignment. This is usually the legally recognized negotiating organization. For example, this could be WFL–CIO or UAW.

   Note: You set up your different bargaining units as values for the Lookup type BARGAINING_UNIT_CODE.

2. Select whether the employee associated with the assignment is a member of a union.

Tracking the NAIC override code

You enter the NAIC override code for an employee's assignment in the GREs and other information tabbed region.

▶ **To enter the NAIC override code:**

1. Select the appropriate NAIC override code from the List of Values in the NAIC override code field.
2. Save your work.

Ending an Assignment

An employee must always have one assignment. If an employee has multiple assignments you can end all but one of their assignments. To remove their last assignment you use the Terminate window. An employee does not become an ex–employee until you have terminated their last assignment.

The following information explains how to use the Assignment window to end multiple assignments.

▶ **To end one of several assignments:**

1. Query the assignment you want to end.
2. Set your effective date to the actual termination date for the assignment.
3. Update the assignment status to End or Terminate Process Assignment (or the equivalent user status on your system):
   - Use *Terminate Process Assignment* (with a Payroll system status of *Process*) if further pay processing of the assignment is required after the date the assignment ends. This leaves the assignment's final processing date open so that further processing can occur.

     It is often best to use this status, so that you can process any necessary adjustments to the final pay for the assignment.
   - Use *End* (with a Payroll system status of *Do Not Process*) if all pay processing for the assignment is finished. This makes your effective date the assignment's *final processing date,* after which no further processing for the assignment can occur.

The End status is not recorded on the assignment. It causes the assignment to end as of the effective date of entry of this status.

Note: To temporarily prevent pay processing for this assignment, use the status *Terminate Assignment* (with a Payroll system status of *Do Not Process*). When no further processing is required and you are ready to set a final processing date, update the status to *End*.

Entering Secondary Assignment Statuses

Your implementation team may have created secondary assignment statuses for analysis and reporting of employee or applicant assignments.

For example, suppose your primary status Maternity Leave applies to employees both when a child is born and when one is adopted, and you want to study its use in these two cases. To accomplish this you can set up the secondary statuses Maternity Birth and Maternity Adopt, and enter them for employees taking maternity leave.

You enter secondary statuses for an employee assignment or an applicant assignment in the Secondary Statuses window.

▶ **To give a secondary status to an assignment:**

1. Select the status and enter a start date.
2. You can also select a reason for giving the new status.

When a status no longer applies, simply enter an end date.

Entering Payment Methods for an Employee Assignment

For each employee assignment, you can enter one or more payment methods, selecting from the list of valid methods for the employee's payroll.

If you enter multiple methods (for example because the employee is paid from more than one source account), you can enter the proportion of pay for each method and its processing priority. An assignment can have two instances of the same payment method, for example if salary is divided between two bank accounts.

Employees with no personal payment method on record receive pay by the default payment method of their payrolls.

You enter payment methods for employee assignments in the Personal Payment Method window. You can also use this window to enter the payee for third party payments.

To enter payment methods you must:

- Assign the employee to a payroll.
- For third party payment methods, define the payee in the Organization window (using the classification Payee Organization) or the Contact window (using the relationship Payments Recipient).

▶ To enter a personal payment method for remuneration:

1. Set your effective date to the date on which to begin paying the employee by this method.
2. In the Name field, select a payment method.
3. Enter a number in the Priority field to determine the order for Oracle Payroll to use each payment method. It uses the method with the lowest number first.
4. Enter either the amount or percentage of the assignment's pay to be paid by this method.

   If the total of the amounts you allocate to payment methods is less than the amount to be paid, Oracle Payroll uses the payment method with the highest priority number to pay the excess.
5. For everywhere apart from the UK, if the payment method is a magnetic transfer type, open the Bank Details window for entry of information about the employee's bank account.

▶ To enter a third party payment method:

1. Set your effective date to the date on which to begin making payments using this method.

2. In the Name field, select a third party payment method.

   Third party payment methods automatically receive priority 1 (the highest priority) and you cannot change this. You cannot split a third party payment between different payment methods; the Percentage field always displays 100%.

3. In the Payee region, select an organization or a person.

4. Save your work.

You can select this third party payment method in the Payee Details entry value when you enter a deduction to be paid as a third party payment.

Changing Primary Assignments

Over time, a secondary assignment may need to be elevated to a primary assignment. Most enterprises have requirements to show this history of changes in an employee record. You change assignments from secondary to primary in the Assignment window.

This process creates two historical records: one showing a secondary assignment that ended, say, on 20 October, and the other showing that the primary assignment started as one set of components and then changed to another set (those of the secondary assignment) on 21 October.

▶ **To change a primary assignment:**

1. Set an effective date for the change of primary assignment.
2. Query an existing secondary assignment, or enter a new one.
3. Update the Primary check box in the Miscellaneous tabbed region to checked
4. Save your changes.

   The system automatically changes the previous primary assignment from primary to secondary. Query the assignment details to see the changes, or use the Assignment History window to view the employee's assignments. DateTrack History also shows the changes made to assignments.

   For more information about DateTrack, see: Viewing the History of Datetracked Information, and Managing Change Over Time, *Using Oracle HRMS – The Fundamentals*

Ending Employment

If an employee is leaving your enterprise or agency, you *terminate* him or her. This changes the person type to ex–employee and ends *all* assignments.

The ex–employee's records remain in the database. You can reinstate, or rehire, the person to create a new period of service.

Since terminating ends all assignments, the system does not permit you to terminate an employee who has future–dated assignments.

> **Note:** If you mistakenly add someone to the database or you want to remove all records for an ex–employee, you can *delete* the person in the Delete Person window.
>
> See: Deleting a Person from the System: page 1 – 47
>
> If you mistakenly hire an applicant, you can cancel the hire in the Person window.
>
> See: Cancelling a Hire: page 1 – 80

Terminating an Employee

You end employment in the Terminate window.

▶ **To terminate an employee:**

1. Optionally, enter the reason for the termination. You can define valid reasons as values for the Lookup Type LEAV_REAS.

   Note: When you enter the termination reason of deceased and an actual termination date, if an employee's date of death has not been entered in the Other Information tabbed region of the people window, it is set to the actual termination date.

2. Enter the termination dates. Only the Actual date is required. This is the date when the employee's person type changes to Ex–employee. The Notified and Projected dates are for information only.

3. When the information is complete, choose the Terminate button to complete the termination.

For further details see Setup To Allow Processing After Termination: page 1 – 26

Cancelling a Hire

Follow this procedure to remove the date entered into the Hire Date field and to change the person type back to Applicant. You cancel a hire using the People window.

Note: You cannot cancel a hire if:

- The person's type has changed since the hire date.
- New assignments have been created for the person after the hire date.
- The person was initially entered on the system as an employee and therefore has no previous history as an applicant or contact. In this case you must delete the person's records from the system using the Delete Person window.

  See: Deleting a Person from the System: page 1 – 47

▶ **To cancel a hire:**

1. Query the employee in the People window and clear the Hire Date field.
2. Save your work.

   The application warns you that any changes made to the person's records after their hire date will be lost. If you continue, all employee records are deleted, and the person type changes to Applicant. The applicant data history is retained.
3. After saving your entries in the Employment Information tabbed region, enter a primary address for the employee.

   Note: In Oracle HRMS, every employee must have a primary address on record at all times.

Cancelling a Termination

If the employee decides not to leave, or the date of leaving changes, you can cancel a termination. You can cancel a termination at any time provided you have not rehired the employee. (You rehire an employee by changing his or her person type to Employee in the Person window.)

Oracle HRMS reopens the assignments previously closed down and gives each assignment the status it had before termination. It also restores other information to its state before termination. For example, it removes the end date put on recurring element entries for the assignment.

> **Note:** Any nonrecurring element entries that were deleted for processing periods after the termination date cannot be automatically restored. You must restore them manually.

▶ **To cancel a termination:**

- Choose the Reverse Termination button in the Terminate window.

▶ **To change the termination date:**

1. Cancel the termination by choosing the Reverse Termination button.
2. Enter a new Actual date and choose the Terminate button.

Using the People Folders

Using the People Folder window, you can enter inquiries about the people held on Oracle HRMS. You select the fields of personal information you want to see, and position them in the order you prefer. For example, you can produce an alphabetical listing of all applicants and their gender, nationality, and disability registration.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

> **Note:** The system administrator can create customized versions of the People Folder window so that you use each version for one person type only.

▶ **To produce lists of assignments:**

1. Enter and run a query in the folder. For example, you could run the query ”C%” in the Full Name field to view all people whose names begin with C.
2. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

For further details about folders, see Customizing the Presentation of Data in a Folder, *Oracle Applications User’s Guide.*

Listing Assignments Using the List Assignments Window

In this window, you can view *current* employees and applicants. To view former employees or applicants (or both current and former), see: Using the List People By Assignments Window: page 1 – 88

▶ **To produce lists of assignments:**

1. Select values in one or more fields in the top part of the window, and choose the Find button.

   If you enter the Job, Position, Grade, or Group fields, a window opens prompting you for individual segments of the flexfield. You can enter selection criteria in one or more segments. This means that you can search on *parts* of the job name, for example.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query ”C%” in the Full Name field to view the assignments of people whose names begin with C.

3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

Listing Assignments Using the Assignments Folder

Using the Assignments Folder window, you can query lists of current assignments, past assignments, or both. You select the fields of assignment information you want to see, and position them in the order you prefer. For example, you can produce a listing of all current employees ordered by organization, and by grade within organization.

The system saves your inquiry and field formatting as a folder so you can rerun the inquiry at any time. You can make this folder available to all users, or save it as a private folder.

> **Note:** The system administrator can create customized versions of the Assignments Folder window so that you use each version for one person type only.
>
> The system administrator can also link this window in a task flow so that you use it to access other windows of employment information. Notice that if you select a past assignment in the folder, you cannot open other windows of employment information.

▶ To produce lists of assignments using the assignment folder

1. Select whether you want to view current assignments, past assignments or both.
2. Run the query.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.
3. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.
4. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

Viewing Assignment History

Use the Assignment History window to view the history of all an employee's assignments, both current and in previous periods of service.

▶ **To view an employee's assignment history:**

1. In the Current field, select Yes, No or All.

   Yes selects the list of current employees. No selects the list of ex–employees. All selects the list of both current and ex–employees.

2. In the Name or Number field, select an employee or ex–employee and choose the Find button.

   The Service History region displays the employee's final period of service. It shows three periods of time:

   - **This Period** shows the number of complete years and months worked in this period of service to date.
   - **All Periods** shows the number of complete years and months worked in all periods of service to date.
   - **Including Breaks** shows the total elapsed time (in complete years and months) from the employee's initial hire date to date.

You can view previous periods of service by choosing Next Record from the Go menu.

Viewing OAB Person Type Usage

Use the Person Type Usage window to view the OAB user person types that have been automatically created.

The OAB user person types shown on the Person Type Usage window are in addition to the type selected in the Type field on the People window. Apart from employee and applicant, they are automatically linked to a person when an event occurs in benefits administration.

▶ **To view OAB person types:**

- Select Person Type Usage from the Other Navigation options in the People window.

Running the Assignment Status Report

This report lists people assigned to particular organizations, jobs, positions and grades, with specific assignment statuses. If you select both applicants and employees as person types, the report prints out in two sections. Otherwise it prints for the type you select.

Run reports from the Submit Requests window.

▶ **To run the Assignment Status Report:**

1. In the Name field, select Assignment Status Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Leave the Organization Structure field blank to see information about all organizations. Select an organization hierarchy name to see assignment statuses in a number of subordinate organizations.
5. If there are multiple versions, select a version.

   If the effective date lies between the version's start and end dates, the report is effective as of this date. If it lies outside these dates, the report is effective as of the start date of the version you select.
6. Leave the Parent Organization field blank to see information about all organizations. Select a name in this field to see information on all subordinate organizations in the hierarchy.

   Note: You must enter a value in this field if you have entered a value in the Organization Structure field, and you must leave this field blank if you left that field blank.
7. Make entries in the Group, Job, Position, Grade and Payroll fields as required.

   If you leave all segments of the Group flexfield blank, you see information about employees in any groups. If you leave one segment blank you see employees with any value for that segment.
8. Enter Yes in the Primary field if you want to report on primary assignments only. Leave blank to include all assignments.
9. Select Employee, Applicant or Both in the Person Type field. This determines which sections of the report are printed.
10. Select up to four assignment statuses, or leave blank to list employees and/or applicants with any assignment status.
11. Choose the Submit button.

Using the List People by Assignment Window

In this window you can choose whether to view current or former employees/applicants, or both. However, you must search on a whole Job, Position, or Grade name, not on segments of these flexfields. To search on segments of the flexfields, use the List Assignments window, see: Listing Assignments Using the List Assignments Window: page 1 – 83

▶ **To produce lists of assignments:**

1. Select values in one or more fields in the top part of the window, and choose the Find button.

   The folder in the lower part of the window lists the assignments that match the selection criteria you entered.

2. You can enter a query in the folder to reduce further the list of assignments displayed. For example, you could run the query "C%" in the Full Name field to view the assignments of people whose names begin with C.

3. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

Running the Employee Movements Report

There are two versions of the Employee Movements Report:

- The Employee Organization Movements Report shows employee movements into and out of a particular organization or hierarchy.
- The Employee Payroll Movements Report shows employee assignment changes to and from a particular payroll.

Both versions list the following movements: New Hires, Terminations, Transfers In, and Transfers Out. You can use this information to monitor employee assignment changes for turnover analysis.

Run reports from the Submit Requests window.

▶ **To run the Employee Organization Movements Report:**

1. In the Name field, select Employee Organization Movements Report.
2. Enter the Parameters field to open the Parameters window.
3. Do one of the following:
   - If you want to see information for a whole organization hierarchy, select the Organization Hierarchy name and version number, and leave Parent Organization blank.
   - If you want to see information for one organization, select the organization name in the Parent Organization field, and leave Organization Hierarchy name and version number blank.
   - If you want to see information for an organization and its subordinates in a particular hierarchy, select the name of the organization and the name and version of the organization hierarchy to which it belongs.
4. Select the period for which you want to see the information.
5. In the Employee Detail field, do one of the following:
   - Select Summary Only to see total numbers for each category of change.
   - Select Order by Assignment Number or Order by Employee Name to see a full listing of employee assignments for New Hires, Terminations, Transfers In, and Transfers Out. This information will be listed in the order you select.
6. Choose the Submit button.

▶ **To run the Employee Payroll Movements Report:**

1. In the Name field, select Employee Payroll Movements Report.

2. Enter the Parameters field to open the Parameters window.
3. Select the payroll and payroll period for which you want to see the information.
4. In the Employee Detail field, do one of the following:
   - Select Summary Only to see total numbers for each category of change.
   - Select Order by Assignment Number or Order by Employee Name to see a full listing of employee assignments for New Hires, Terminations, Transfers In, and Transfers Out. This information will be listed in the order you select.
5. Choose the Submit button.

Running the Employee Summary Report

This report is a current summary of information for an employee, covering addresses, contacts, period of service, assignments, special information, personal payment methods, and element entries.

Run reports from the Submit Requests window.

▶ **To run the Employee Summary Report:**

1. In the Name field, select Employee Summary.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Enter the name of the employee whose summary you want to see.
5. Choose the Submit button.

Listing Employees by Position

There are two windows for viewing lists of employees by position:

- List Employees by Position
- List Employees by Position Hierarchy

List Employees by Position Window

To view employees in a single position, or in all positions corresponding to a job or organization, use the List Employees by Position window.

▶ **To view employee names by position:**

1. Select any combination of an organization, job, or position.
2. Choose the Find button.

   The folder displays the positions that match your selection criteria, together with the holder's name and employee number.

   If there is more than one holder for a position, the number of holders is displayed in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

   Note: You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

List Employees by Position Hierarchy Window

To view lists of employees in a number of positions within a hierarchy, use the List Employees by Position Hierarchy window.

▶ **To view lists of positions within a position hierarchy:**

1. Select a position hierarchy and the highest position in the hierarchy for which you want to list employees.
2. Choose the Find button.

   The folder displays all positions below the one you selected in the hierarchy. It also lists the employees who hold these positions.

   If there is more than one holder for a position, the number of holders appears in the Holder Name field. You can view the names of these holders by choosing the List icon from the Toolbar.

   Note: You can enter a query in the folder to reduce further the list of positions displayed. You can remove, rearrange, add, or resize fields in the folder if you have access to the Folder menu.

Listing Employees by Organization

In the List Employees by Organization window, you can view lists of employees within one organization or within all organizations below a specified level in a hierarchy you select.

▶ **To list employees in several organizations:**

- Select an organization hierarchy and select the highest organization in this hierarchy for which you want to list employees. Choose the Find button.

▶ **To list employees in one organization only:**

- Leave the Organization Hierarchy field blank and select an organization. Choose the Find button.

  You can enter a query in the Employees block to further restrict the list of employees to be displayed.

Manager Field

The Manager field identifies any employee for whom the Manager check box is checked in the Miscellaneous region of the Assignment window.

If there is more than one manager in the organization you select, the Manager field displays the number of managers. You can view the names of these managers by choosing the List icon from the Toolbar.

Organization Field

If an employee belongs to more than one organization within the hierarchy you selected, the number of organizations appears in the Organization field. You can view the names of these organizations by choosing the List icon from the Toolbar.

Listing People by Special Information

To view a list of people who match a particular profile for one Special Information Type, use the List People By Special Information window.

> **Note:** The system administrator can create customized versions of the List People By Special Information window so that you use each version for one information type only. For example, one version could be called List People By Technical Skills.

▶ **To list people by special information:**

1. Select a Special Information Type.
2. Click in the Details field. A window opens prompting you for the details you have defined for this information type.
3. Enter values in the fields against which you want to match people, then choose OK. If you leave a field blank, it is not used in the matching process.
4. Choose the Find button.

   Employees and applicants who match your selection criteria are listed in the folder in the lower part of the window. You can enter a query here to further restrict the list of people. If you have access to the Folder menu you can remove, rearrange, or resize the fields displayed.

Running the Terminations Report

This report shows the reasons why employees left your organization within a specified period.

You run reports from the Submit Requests window.

▶ **To run the Terminations Report:**

1. In the Name field, select Terminations.
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 an organization hierarchy name, if you want to see terminations in a number of subordinate organizations. If there are multiple versions, select a version.
5. In the Parent Organization field, select the parent organization within the hierarchy whose subordinate organizations you want to see in the report.

   If you have not selected an organization hierarchy, use the Parent Organization field to enter the name of the organization for which you want to view terminations.
6. Enter the start and end dates defining the period in which you are interested.
7. Select at least one termination reason to include in the report.
8. Choose the Submit button.

CHAPTER

2

Recruitment

Recruitment

Oracle Human Resources gives you flexible control over your entire recruitment cycle, from the stage where a vacancy is first identified, through to the rejection or appointment of an applicant.

How can you advertise your vacancies internally?

Using web–based Oracle Self–Service Human Resources (SSHR), you can give your line managers and employees an at–a–glance view of all vacancies.

How can you manage the interview process?

You can use Oracle HRMS to both schedule your interviews and to update the assignment status of applicants. You can also produce a report on applicants and their interview schedules.

How can you match applicants to vacancies?

Oracle HRMS enables you to record both the competencies required for a position and those held by an applicant. Using the web–based Suitability Matching tool, you can then identify which applicants are most suited to the position by making a comparison between the competencies required and the competencies held by each applicant.

Can you use standard letters to help manage your recruitment cycle?

You can create standard letters and link them to assignment statuses. For example, you can set up a standard letter that is triggered when an applicant's assignment status changes to "Rejected".

Does Oracle HRMS support the internal approval process for job offers?

Yes, using Candidate Offers (part of SSHR), you can compose a job offer on the web and route it to the appropriate managers for approval. If approval is given, you can generate an offer letter and track the candidate's response.

How can you manage the hiring process?

Using Oracle HRMS, you can convert your applicants or ex–employees to new employees with the minimum of effort.

In addition, the hiring process supports a wide range of other business needs, such as back–to–back employment. It also provides you with validation. For example, you cannot rehire an ex–employee if the final process date for the previous employment is still blank. This validation ensures that the information held in the database is always correct and datetracked.

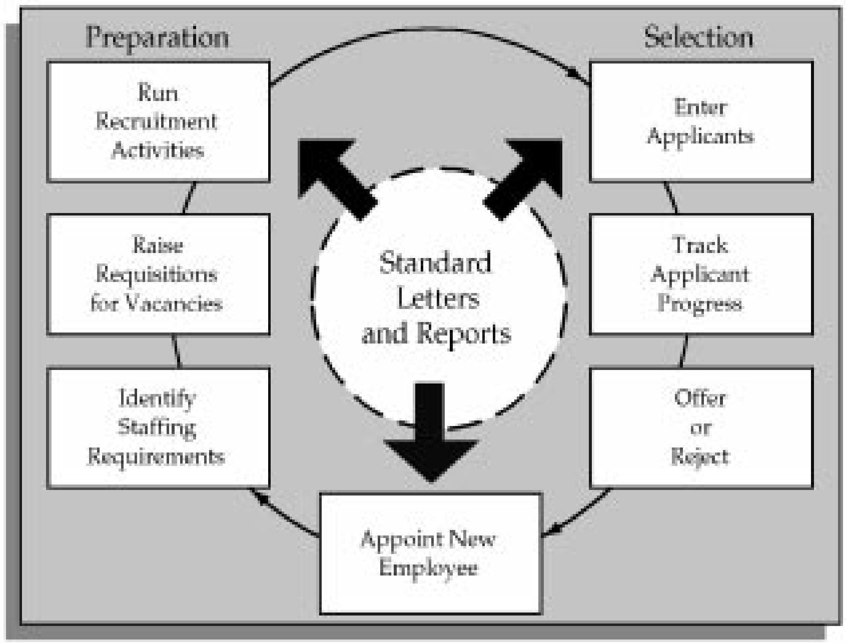
Recruitment Overview

Using Oracle HRMS, you can set up your recruitment procedures exactly as your enterprise requires.

Oracle HRMS and the Recruitment Cycle

Within any recruitment function, there is a common cycle of tasks:

Figure 2 – 1 The Recruitment Cycle



An analysis of your own detailed working practices will help you to decide whether to use Oracle Human Resources at a basic or an advanced level within each area of the recruitment cycle. At the same time, you should identify the sequence of tasks performed by your users, from which you can derive one or more Recruitment task flows.

Using Oracle HRMS, you can manage the three key areas of the recruitment cycle:

- **Recruitment Preparation**. Preparation is concerned with the identification of a vacancy, the authorization to take some action, and running recruitment activities.
- **Selection Process**. Selection begins with the receipt of applications and ends with the issue of offer or rejection letters.

You define your own stages of the selection process and track applicants' progress.

- **Appointment**. Appointment takes the applicant from the recruitment process to employee administration, where the initial tasks include entering terms and conditions and payroll information.

Each task in the recruitment cycle is supported by automation of the standard paperwork that accompanies any recruitment process.

Key Concepts

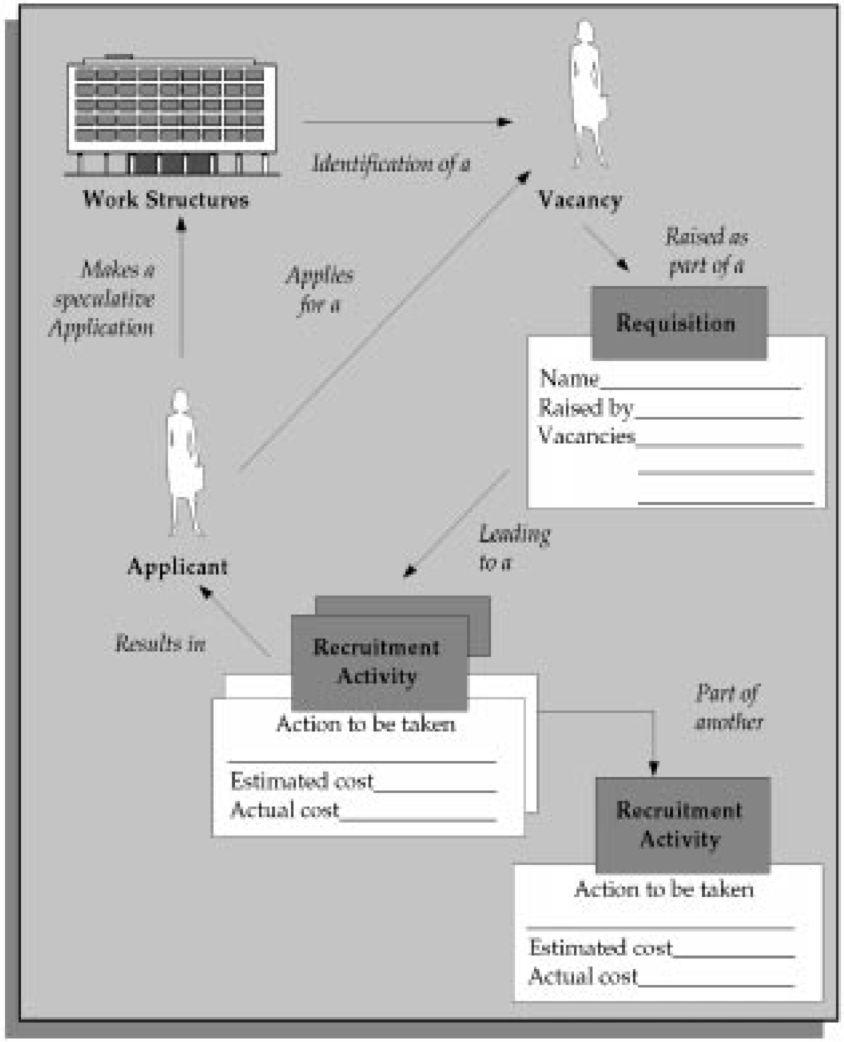
To enable you to get the most of of your recruitment functionality using Oracle HRMS, you need to understand the following key concepts:

- Applications: page 2 – 10
- Applicant Assignments: page 2 – 10
- Applicant Assignment Statuses: page 2 – 12

Recruitment Preparation

Selecting applicants for recruitment is an extended process. You have to plan and coordinate a series of steps from identifying vacancies to organizing recruitment events.

Figure 2 – 2 Recruitment Preparation



Identification of Staff Requirements

Using Oracle HRMS you can define budgets to reveal the headcount requirements within your enterprise, and then raise requisitions for the vacancies you require. You might have prior authorization to maintain your headcount or you might need to get authorization when you identify the vacancy.

Vacancy Requisitions

Oracle Human Resources lets you record and use the information you need to raise a requisition at the time you need it. This can be particularly useful where an applicant takes the initiative by making a speculative approach. Your authorized vacancy list is clear and up to date at all times.

You can view lists of vacancies of a particular status, or a selected organization, location, job, position, grade, group, recruiter, or recruitment activity using the Requisition and Vacancy window.

Oracle SSHR and Vacancy Advertisements

You can now advertise vacancies internally using Oracle Self–Service Human Resources (SSHR). This self–service approach enables employees and line managers to view vacancies at–a–glance and to apply for them on the web

To enable you to advertise vacancies using self–service access, you define vacancy categories (Lookup Type VACANCY_CATEGORY), then select the appropriate category while completing the Requisition and Vacancy window.

Recruitment Activities

The authorization to recruit normally results in a specific recruitment activity, such as an advertisement. This might be part of some shared recruitment activity, such as an advertisement for more than one vacancy. The shared activity, in turn, might be part of another recruitment activity, such as a Graduate Recruitment Campaign.

Oracle Human Resources enables you to define and manage your recruitment activities.

Figure 2 – 3 Recruitment Activities

Selection Processing

The selection process begins with the receipt of applications and ends with the termination of an application or an offer letter.

The tasks involved in selection processing include:

- Recording job offers with web based questionnaires and routing them for approval, using Oracle SSHR's Candidate Offers functionality.
- Entering applicants' details
- Scheduling interviews and other recruitment events
- Matching applicants' details to vacancies using Suitability Matching
- Terminating applications

The progress of applicants as they move through each stage of the process is monitored, controlled, and documented as required.

Applications and Assignments

Oracle Human Resources lets you record addresses, personal details, application information, competencies, qualifications, school and college attendances, and work choices for all applicants. You track an application as one or more assignments for the applicant, similar to employee assignments. This has several advantages:

- It speeds up hiring the successful applicant since most of the important information is already on the system.
- It makes it easy to track several applications from one applicant as separate assignments.
- It enables you to enter an application from an existing employee: you update the Person Type to *Employee and Applicant* (or your user name equivalent) and enter the application as an applicant assignment.

Additional Application Information

If you want to hold further details of the applicant's skills, experience, or current situation, you can choose how to do this when you implement Oracle Human Resources. For example:

- Enter qualifications, deployment choices, and a personal competence profile for applicants. You can then perform suitability matches on these people using the Oracle Self–Service Human Resources (SSHR) Suitability Match option.

  See: Employee Development: page 1 – 8
- Use attachments to hold free text information.
- Set up segments of the Additional Application Details descriptive flexfield to hold the information you require.

  See: User Definable Descriptive Flexfields, *Customizing, Reporting and System Administration in Oracle HRMS*
- Set up Special Information Types to hold skills information to use for skills matching.

  See: Special Information Types: page 1 – 30

Application Entry Methods

Oracle HRMS gives you the flexibility to enter an applicant's details in one of two ways:

- Quick entry using the Applicant Entry window. This enables you to enter basic person information and a single assignment for an applicant. To make this window quick and easy to use, you can only enter one address and one assignment for the applicant.

- Detailed entry using the People window and the Application window. This enables you to enter an application if you need to record multiple assignments for an applicant, enter Government Extra Information, record more than one address for an applicant, or update applicant information.

Suitability Matching

If you want to match applicants with skill requirements during the selection process, you can enter competence requirements for jobs, positions and organizations. You can then use the web–based suitability search tool to compare the competence profiles of your applicants against the requirements of the vacancy.

See: Person Search, *Implementing Oracle Self–Service Human Resources (SSHR)*

You can also enter work choices (such as relocation and willingness to travel) against jobs and positions. In the same way, you can record the work choices of your applicants.

You can hold a person specification or a job description on the system as attachments or using user–defined fields (called *descriptive flexfield segments*). As with requirements, these can be held at both job and position level.

Applicant Assignment Group Updates

The Mass Update of Applicants window contains a folder in which you can view all applicants and their assignment components and status. You can query groups of applicant assignments and update them as a group. You can perform two types of mass update:

- You can refer a group of applicants from one recruiter to another. The recruiter is the person responsible for handling the application.
- You can change the status of the applicant assignments.

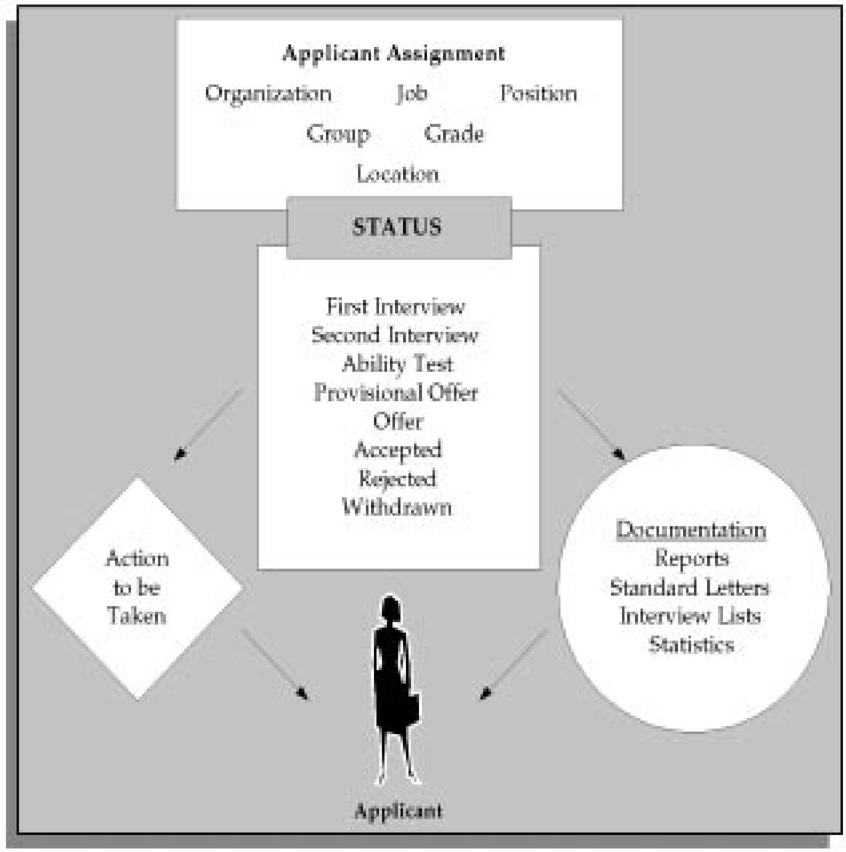
Full Applicant Details Report

The Full Applicant Details report enables you to get a comprehensive report about an applicant.

Applicant Assignment Statuses

The progress of all applicants through the selection process is controlled by *applicant assignment statuses*. Each stage of the selection process is identified by a single assignment status. It is by changing the status that you can record the progress of any applicant assignment.

Figure 2 – 4 The Applicant Assignment and its Status



As with employee assignment statuses, there is a set of system statuses that are used in various internal processes:

- *Active Application*: This is the normal status of an application as it progresses through the selection stages.
- *Offer*: Use this status for your preferred candidate when an offer has been made.
- *Accepted*: Update the preferred candidate's assignment to Accepted status when you are ready to hire him or her in the People window.

- *First Interview*: Use this to indicate a candidate has reached the first interview.
- *Second Interview*: Use this to indicate a candidate has reached the second interview.
- *Terminate Application*. Use this status to end an applicant's assignment. You can only do this if the applicant has one or more other assignments in progress.

  Note: The Terminate Application status is not recorded on the applicant assignment; it causes the assignment to end.

On your system, you can give these statuses different names (called User Statuses), appropriate to your enterprise. You can define user statuses such as Applicant Received, Applicant Acknowledged for the system status Active Application.

See: Defining Assignment Statuses: page 1 – 33

Primary Applicant Assignment Statuses

Primary statuses determine how the assignment is processed and handled by the system. An assignment must have one, and only one, primary status.

You can update an applicant assignment status in the following windows:

- Application
- Applicant Interview
- Terminate Applicant

When you change the status, you can enter a reason for the change. Define valid reasons as values for the Lookup Type APL_ASSIGN_REASON.

You can also change the status of a group of applicants in the Mass Update of Applicants window. For example, if you want to call 20 applicants to a selection test and to reject all other applicants for the vacancy, you can do this in the Mass Update of Applicants window.

Changing a primary applicant assignment status can trigger the generation of a standard letter.

Secondary Applicant Assignment Statuses

There may also be *Secondary* statuses set up on your system. You can use secondary statuses for analysis and reporting, but they are not used for processing.

See: Defining Secondary Statuses: page 1 – 33

You can give an assignment multiple secondary statuses. You enter secondary statuses in the Secondary Statuses window.

See: Entering Secondary Assignment Statuses: page 1 – 75

Interviews and Other Recruitment Events

Interviews

Typically, you track applicant progress through a series of interviews and update the status of the application after each interview.

You can schedule these interviews and update the applicant assignment status using the Applicant Interview window.

See: Scheduling an Interview: page 2 – 25

Recruitment Events

You can also manage events attended by multiple applicants, such as tests or presentations. You define types of applicant event as values for the Lookup Type APL_EVENT_TYPE. You create the events and book applicants onto them using the Event Bookings window.

See: Event and Attendance Administration: page 3 – 43

You can view all the events an applicant has attended or is scheduled to attend by querying the applicant in the People window and opening the Book Events window. You can also enter new bookings here.

Applicant and Interview Reports

The Requisition Summary Report enables you to see lists of applicants and their interview schedules.

See: Running the Requisition Summary Report: page 2 – 32

Application Termination

If you have rejected an applicant assignment, you can simply update its status to Terminate Application. However, an applicant must be left with one active assignment. To reject an applicant's last assignment, you must terminate the applicant. This updates their person type to Ex–applicant.

Appointments and the Hiring Process

The appointment process takes the applicant from the recruitment process to employee administration where the initial tasks include entering terms and conditions and payroll information. If you are an OFHR user, you use the Request for Personnel Action (RPA) to do this.

If you are using Oracle SSHR, you can use the Candidate Offers functionality to generate offer letters.

Hire Date Rules for Applicants and Ex–Employees

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

The following general rules. apply to the **earliest hire date** for Applicants and Ex–Employees:

Hiring an Applicant

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

Rehiring an Ex–Employee

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

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

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

Hire Dates and Future–Dated Changes

Oracle HRMS enables you to make future–dated changes to a person's details.

If you make future–dated changes to an applicant's details, such as changing their name, and you subsequently hire the person, the earliest hire date you can enter is the day following the date of the last change. The hire date can, of course, be any date into the future (providing it is after the date of the last change plus an additional day). For example, if you received an application on January 10th and you changed the applicant's details using future–dates, say on January 22nd and February 10th and you subsequently hire the applicant, the earliest hire date you can enter is February 11th (the date of the **last** change plus one day).

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

Rehire of Ex–Employees

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

Back–to–Back Employment

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

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

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

Raising a Requisition for a Vacancy

Use the Requisition and Vacancy window to record requisitions, vacancies, and openings within your enterprise. A requisition can be for one or more vacancies, and a vacancy can have one or more openings.

Before you can perform this task, the stages through which vacancies pass must be defined using the Lookup Type VACANCY_STATUS. Examples might be Authorized, Advertised, and Shortlisted.

To advertise vacancies using Oracle Self–Service Human Resources (SSHR), the Lookup Type VACANCY_CATEGORY is used to define the vacancy categories under which vacancies are automatically advertised.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ To raise a requisition for a vacancy:

1. Enter the requisition and save it before beginning to define the vacancy.
2. Enter a name and number of openings for the vacancy.
3. If you advertise vacancies using SSHR, enter the vacancy category. The vacancy is automatically advertised under this category.
4. Optionally enter a description and select a status.
5. You can select one or more assignment components to define the vacancy.
6. Optionally enter the name of the recruiter.
7. Optionally enter the budget measurement unit and value for the vacancy. The value you enter is for all the openings for that vacancy. For example, your vacancy could have the budget measurement unit of Headcount and a value of 2. If the number of openings for the vacancy is 4, each opening effectively has a Headcount of 0.5.

   Note: You need to set up the budget measurement information if you want to use the OBIS Recruitment Analysis report and related OBIS PMFs and workbooks.

Defining a Recruitment Activity

Use the Recruitment Activity window to define either single recruitment activities or groups of activities. You can associate a recruitment activity with an organization and with one or more vacancies. You can record and monitor the cost effectiveness of any activity, or group of activities.

Before you can define recruitment activities, recruitment activity types must be defined as values for the Lookup Type REC_TYPE.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ To define recruitment activities:

1. Enter the details of the recruitment activity.

   You can enter the name of a 'parent' recruitment activity in the Within Recruitment Activity region, if the activity you are defining is part of a campaign.

2. Choose the Recruiting For button to select one or more vacancies to associate with the activity.

Viewing Vacancies

Use the View Vacancies window to see lists of vacancies for an organization, location, job, position, grade, group, recruiter, or recruitment activity. You can also see all vacancies of a particular status.

▶ **To view vacancies:**

1. Enter selection criteria in any of the fields in the top half of the window.

   Leave all these fields blank to see all vacancies in your Business Group.

2. Choose the Find button to see the vacancies that correspond to the criteria you have entered.

   In the folder you can enter a query to further restrict the vacancies displayed. If you have access to the Folder menu, you can also rename, resize, and reorder the fields displayed.

Recording an Application Quickly

Use the Applicant Entry window to enter basic personal information and one assignment for an application.

If you need to update this information or add further information, use the People and Application windows.

▶ **To record an application quickly:**

1. Enter the applicant's name and an identifying number recognized by the system.

   Note: If your Business Group uses automatic number generation, the applicant number automatically displays when you save your entries in this window.

2. Select a status for the application. By default a new application has the status Active Application (or an equivalent user status defined on your system). All other fields are optional.

3. Enter information in the Further Information field if it has been set up by your Oracle localization team.

   If you are in the US, you can select Ethnic Origin and may also want to enter Visa Type (for non–citizens eligible for employment in the US), I–9 information and Veteran Status.

   If you are in the UK or Canada, you can select Ethnic Origin and enter a work permit number, if appropriate.

4. To enter an address, select a national address style.

   A window opens with the address format for the country you select. Enter the address lines and choose OK.

5. The Date Received defaults to your effective date, but you can change it. This is the date the applicant's record will begin.

6. You can enter the name of the applicant's current employer.

7. You can select a recruitment activity. If there is only one vacancy for the activity, the vacancy details appear automatically.

8. If you select a vacancy, applicant assignment information is displayed from the vacancy record. You can add to this information or change it. However, if you change it, the vacancy field clears.

9. If you do not select a vacancy, you can enter assignment information in the Vacancy Applied For region. If you do not enter an organization, it defaults to the Business Group.

Entering Full Application Information

Use the People window and the Application window to enter detailed applicant information.

For other applications, you can use the Applicant Entry window.

If you want to use your own status names to record the stages of your selection process, user statuses must have been previously entered for the predefined applicant assignment statuses.

See: Applicant Assignment Statuses: page 2 – 12

If you want to record reasons for giving a status to an applicant assignment, valid reasons must be defined as values for the Lookup Type APL_ASSIGN_REASON.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ To enter an application in full:

1. Set your effective date to the date you want the applicant assignment to begin, such as the closing date for applications.
2. Enter personal information for the applicant in the People window.

   See: Entering a New Person: page 1 – 38
3. Open the Application window. If you change the Date Received, this changes the effective start date for the applicant. You can enter the date you expect to hire the new recruit.

   You cannot enter a Termination date in this window. You must use the Terminate Applicant window.
4. You can enter the name of the applicant’s current employer.
5. If the application is for a specific vacancy, select the recruitment activity and vacancy. Assignment information from the vacancy is displayed. You can add more assignment details.
6. Select an applicant assignment status and the reason for giving this status. The applicant assignment status is the key to processing the application.
7. Optionally you can enter information, in the tabbed regions, about the following:
   - The recruiter who is responsible for handling the application
   - The supervisor of the assignment
   - The standard conditions and probation period for the assignment

- The source of the application, such as the type of recruitment activity, or the organization that recommended the applicant, or the employee who referred the application
- The employment terms under which the applicant would be hired, such as the contract or collective agreement that would be applicable

Scheduling an Interview

Follow this procedure to schedule an interview for an applicant and to update the applicant assignment status.

You perform this task using the Applicant Interview window.

Before you can schedule interviews, interview types, such as First Interview, or Selection Test, must be defined as values for the Lookup Type APL_INTERVIEW_TYPE.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ **To schedule applicant interviews:**

1. Select an interview type, and enter the date of the interview in the Start Date field.

   You can also select a location and enter times and an end date.

2. If you want to associate an applicant assignment status change with the interview, enter it in the New Status field. This creates a datetracked update to the applicant assignment.

   You cannot enter a status when:

   - There are future changes to the assignment
   - The interview date is the date when the active application status began
   - You are updating an existing interview record

Updating Applicant Assignments by Group

You query and update groups of applicant assignments using the Mass Update of Applicants window.

▶ **To update a group of applicant assignments:**

1. Select Find from the Query menu to open the Find Applications window. Enter selection criteria for the group of applicants you want to update and choose the Find button.
2. Do one of the following:
   - If you want to update all or most of these applicant assignments, choose the Select All button. Then uncheck the Mark check box for any assignments that you do not want to update.
   - If you want to update less than half of this group of assignments, check the Mark check box for each assignment you want to update.
3. Choose the Update button.
4. In the Update window:
   - If you want to update the status of the selected assignments, select the new status.
   - If you want to refer these applicants to a new recruiter, select the name of the Recruiter.
5. Choose OK to effect the update.

Rejecting an Application

If you have rejected an applicant assignment, you can update its status to Terminate Application. However, an applicant must be left with one active assignment.

To reject an applicant's last assignment, you must terminate the applicant. This updates their person type to Ex–applicant. You terminate an applicant using the Terminate Application window

If you want to hold reasons for rejecting applicants, valid reasons must be defined as values for the Lookup Type TERM_APL_REASON.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

▶ **To terminate an applicant:**

1. Enter the termination date.
2. Enter the status Terminate Application, or your User Status equivalent.

   This is not required, but you might use it to trigger generation of a rejection letter.

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

   Note: This status is not recorded on the applicant assignment, so it is not displayed if you re–query the termination.
3. If you want to record the reasons for rejecting applicants, select a reason.
4. Choose the Terminate button.

Canceling a Termination

If you have terminated an applicant in error, you can cancel the termination in the Terminate Applicant window. Simply choose the Reverse Termination button.

> **Note:** You cannot cancel a termination if there are any future changes to the applicant's personal record. You must delete these changes first.

Changing the Hire Date

This procedure enables you to alter the effective date in the Hire Date field of the Application Window.

▶ **To change the hire date:**

1. Query the applicant if it does not already appear there.
2. Change the hire date.
   - It must be within the active period of service.
   - There must be no actual termination date or final payment date for the person.
   - It must be sometime between the last change (person type or attribute change) plus a day, and any future–dated changes (person type or attribute change) minus a day.
   - The change must not break any of the hire or rehire rules.

   See: Appointments and the Hiring Process: page 2 – 17
3. Save your changes.

Hiring an Applicant

Follow the procedure described below to enter a hiring date for an applicant and to change the applicant's person type to Employee.

▶ **To hire an applicant:**

1. Update the applicant assignment status to Accepted in the Application window and save the change.
2. Set your effective date to the applicant's hire date.

   Note: If future–dated changes exist, the hire date is the date of the last change plus at least one day. If no future–dated changes exist, the minimum hire date is the accepted date, plus one day.
3. Query the applicant in the People window.
4. Select Employee in the Type field.
   - The Latest Hire Date field displays your effective date.
   - For employees who have previously worked for your enterprise, the Date First Hired field displays the start date of your employee's earliest, previous period of service. This date must be on or before the start date of the earliest period of service.
5. Save your work.

   Note: If you are an OFHR user, the Person Type automatically updates when the RPA updates the HR records and produces the Notification of Personnel Action.

Rehiring an Ex–Employee

This task shows you how to enter a hire date for an ex–employee. You can rehire an employee whose previous contract ended one day before the new contract begins (known as a *back–to–back contract*).

> **Note:** You cannot rehire an ex–employee if the final process date for the previous employment is still blank. Check that the final process date (on the Terminate window) is entered before you rehire.

You use the People window to enter a hire date.

▶ To rehire an ex–employee:

1. Set your effective date to the new hire date. For back–to–back contacts, the hire date must be the final process date (and actual termination date) plus one day.
2. Query the ex–employee in the People window.
3. In the Type field, select Employee. The Hire Date field displays your effective date.
4. Save your work.

Cancelling a Hire

Follow this procedure to remove the date entered into the Hire Date field and to change the person type back to Applicant. You cancel a hire using the People window.

Note: You cannot cancel a hire if:

– Oracle Payroll has processed the employee in a payroll run.

– The person's type has changed since the hire date.

– New assignments have been created for the person after the hire date.

– The person was initially entered on the system as an employee and therefore has no previous history as an applicant or contact. In this case you must delete the person's records from the system using the Delete Person window.

See: Deleting a Person from the System: page 1 – 47

▶ **To cancel a hire:**

1. Query the employee in the People window and clear the Hire Date field.
2. Save your work.

   The application warns you that any changes made to the person's records after their hire date will be lost. If you continue, all employee records are deleted, and the person type changes to Applicant. The applicant data history is retained.

Running the Requisition Summary Report

The Requisition Summary Report enables you to see lists of applicants and their interview schedules for:

- All vacancies in a requisition
- All vacancies associated with a recruitment activity
- Vacancies in a particular organization, location, job, position, grade, and/or group, and vacancies of a selected status

Each page of the report lists the applicants for one vacancy. This is defined as a unique combination of assignment components (organization, location, job, position, grade, and group). The vacancy has a name if you have set up vacancies on the system using the Requisition and Vacancy window, but this is not essential for running the report.

You run reports from the Submit Requests window.

▶ **To run the Requisition Summary Report:**

1. In the Name field, select Requisition Summary.
2. Enter the Parameters field to open the Parameters window.
3. Restrict the applicants to appear in the report by selecting:
   - A requisition
   - A recruitment activity
   - A particular organization, location, job, position, grade, and/or group
4. Specify the start and end dates for the applicant assignments to further restrict the applicants listed in the report.
5. Select an applicant assignment status, if required.
6. Choose the Submit button.

CHAPTER

3

Career and Succession Management

Career and Succession Management

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.

What are the advantages of the common competence approach?

Performance management and the competence approach enable you to use a single, unified model and language for traditionally different activities, such as appraisals, competence evaluation and recording accomplishments. A common framework enables you to:

- Identify and measure consistently the knowledge, skills and behavior displayed by your employees across the enterprise.
- Speed the deployment process within your enterprise and reduce recruitment costs. You can identify and select employees and applicants on a common basis and match them with opportunities that arise across the whole enterprise. This ensures that an able candidate is not rejected because of a mismatch for one vacancy when other suitable vacancies exist.
- Ensure your enterprise meets its business goals. You do this by linking the competencies held by your employees into the competencies required to meet the business goals of your enterprise.
- Answer complex questions. For example:
  - Has the gap between required competencies and accomplishments changed in salespeople, and has the change affected revenue?
  - How much did we spend per head on training, and how does this relate to improved performance?

Can you perform competence evaluation and appraisals?

Yes. Oracle HRMS' highly configurable web interface enables you to design and perform competence–based evaluation as part of the appraisal process. You create your own appraisal templates, which you can tailor for different parts of your enterprise to ensure that job– or position–specific competencies are assessed, as well as core competencies.

When performing competence–based evaluation, managers and employees can measure and record a score of how an employee has performed against each competence. This provides clear and accessible measures, for example:

- Is the person demonstrating the specified behavior at the level defined?
- Does the person have the knowledge or skills required to operate effectively?

Is it mandatory to implement the competence approach?

No. Oracle recommends that you implement competence–based career and succession management so that you can take full advantage of the functionality in Oracle Human Resources. This approach also enables you to use the HRMS Intelligence employee development reports and workbooks. However, if your enterprise is still using Special Information Types (SITs) to record skills information, you can continue to use those instead.

How do you define career paths within your enterprise?

Oracle HRMS enables you to define career paths in your enterprise, based on job progression or position progression. You use the model that best reflects the structure of your enterprise.

Can you use the Web to access career and succession information?

Yes. Using Oracle Self–Service Human Resources (SSHR), a web browser and your Intranet, you can:

- Enter, review and update qualifications, licenses and awards
- Create and perform appraisals
- Update competence profiles
- Perform suitability matching
- Enter succession plan options

Line manager and employee access to web–based information is determined by user privileges.

What are the advantages of SSHR and web–based HR management?

SSHR gives HR departments, line managers and employees direct and secure access to up–to–date HR information using an enterprise's Intranet. Benefits include:

- Easy updating of employee information by the employees themselves, reducing the delay in performing the task and freeing up the time of the HR department.
- Secure access to determine which information employees can view and change. User–definable approval processes mean that you can specify which employee changes require approval before they can be implemented.
- Ability to easily create and re–engineer HR processes using SSHR's built–in workflow functionality. This helps you manage the efficient transfer of information between HR professionals, line managers, employees and applicants.

By decentralizing responsibility from an HR department to employees themselves, you can reduce administrative costs and delays and also encourage both managers and employees to take an active role in the HR process.

How can I use Oracle Training Administration (OTA) to help with career management?

OTA enables you to record the competencies that a training course is expected to deliver. You can then use this information to update the competence profiles of the students who attended the course.

☞ **Attention:** This software should not be used as the sole method of assessment for making judgements about hiring, performance or deployment. Your company may be held liable if you rely on incorrect computer data or computerized rules to make such judgements.

It is the customer's responsibility to take all appropriate measures to comply with the Data Protection and Privacy laws of the countries in which they operate.

All personal information that you store or use with this software must be up to date, accurate and relevant. You should confirm the details of the restrictions that apply to the computerized storage and use of personal information with your own legal department or representative.

Can I use HRMS Intelligence to investigate and monitor career management?

Yes. There are HRMS Intelligence Reports, Discoverer Workbooks and Performance Measures which are designed to help you investigate the competencies, proficiencies and training within your enterprise. You can use HRMS Intelligence to answer business questions such as:

- How many people, and which ones, have the required skills and competencies for the job?

- How quickly can I improve the skills of a group of people, and at what cost?
- How does a person compare with the skills and competencies needed for the job?
- Do my employees need more training?

Career and Succession Management Overview

There are two different ways of managing careers and succession using Oracle HRMS:

- Competence management
- Special Information Types

Competence Management

Competence management is an HR management approach that is linked to the business needs of an enterprise. It enables you to define the work that needs to be done within the enterprise and the competencies needed to do the work well. It ensures the enterprise meets its business goals.

Using a structured approach to competence management, you can measure and assess the competencies across your enterprise in a consistent, but flexible, manner. You use a common language to describe the knowledge, experience and skills of your employees, making it easier and fairer to assess and deploy them within the enterprise. The highly configurable Oracle HRMS competence repository enables you to store the competencies and methods of measurement that best suit your enterprise.

We call the Oracle HRMS approach ”end–to–end competence management”, because once you have defined the competencies required for a Business Group, organization, job, position, or vacancy, you can use the same information to:

- Profile internal or external job applicants and decide who is most suitable for a job or position
- Search for employees who could be deployed into a new post, because they have the appropriate competencies
- Graphically show a person’s competencies compared with those required for a job and identify training requirements
- Graphically compare a group of people with each other and with the needs of a job, so that you can rank the candidates and identify group training requirements
- Continually assess the competencies held by your employees, using methods such as 360 degree appraisals
- Identify training requirements and create training that delivers new or more advanced competencies
- Enable employees to apply for job openings based on the competencies they hold or that are required by the job or position

- Enable employees to apply for training courses based on their assessment of their competence gap and the competencies delivered by the course
- Develop competence–based pay programs
- Develop career plans based on competence profiles and future opportunities to use those competencies

Competence Management Key Concepts

To enable you to set up and use competence management functionality to the full, you need to understand the following key concepts.

- Competencies

  Competencies enable you to identify and measure the skills, ability, knowledge, and experience held by employees in your enterprise. You can also use competencies to define the requirements of a job or position and to match people to jobs or positions.

- Proficiency levels (and behavioral indicators)

  You use proficiency levels and behavioral indicators to measure how a competence is displayed.

- Rating Scales

  Rating scales are used to describe competencies in a general way. This means that you can use the same rating scale for different competencies. Instead of holding the proficiency level at the competence level, you use a general rating scale and text to describe the competence.

- Competence Measurement

  Setting up a consistent method of measurement enables you to quantify the competencies held across your entire enterprise. You can structure your competencies using general rating scales, proficiency levels, or a mixture of the two.

- Competence Types

  You use competence types to group competencies together, so that you can create competencies which display complex behaviors.

- Competence Requirements

  Competence requirements enable the enterprise to meet its business goals. You can define the competencies required by everyone in the enterprise (core competencies), and define the competencies required by a job or position.

- Qualification Types

  You can enter the qualification types (and the establishments that deliver these qualifications) that are recognized by your enterprise.

- Appraisals

  You can create the types of appraisals you require to meet the needs of your enterprise. For example, you can create different types of appraisals, you can include a questionnaire to gather additional information, and so on.

- Career paths and succession plans

  A career path shows a possible progression to one job or position from any number of other jobs or positions. Succession plans enable you to identify the employees best suited to a job or position and help you identify training needs or scarce competencies.

Special Information Types

If you are using the skills–matching approach to career and succession management, you need to understand the concept of Special Information Types: page 3 – 40.

You use the skills–matching approach to:

- Record skill or experience for a person
- Hold skills requirements for a job or position
- Match employees' skills to the skills required by a job or position

Which Approach? Competence Management or Special Information Types?

Competence management is now the recommended approach to career and succession planning. However, if your enterprise is still using Special Information Types you can continue to use them, but you will not be able to use the competence–based features of Oracle HRMS, or access web–based information using Oracle Self–Service Human Resources (SSHR).

Other Areas of Career and Succession Management

There are other aspects of career and succession management that are not specific to either the competence–based or special information type approach:

- You can set up events (for example, training events) and to track employee attendance at these events. You only need this functionality if you are not using Oracle Training Administration.
- You can record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

See: Event and Attendance Administration: page 3 – 43

Competencies

Oracle Human Resources defines the term *competence* as measurable behavior, specifically ”any measurable behavior required by an organization, job or position that a person may demonstrate in the work context”. So, a competence can be a:

- Piece of knowledge (such as the names of all the rivers in China)
- Skill (such as an interpersonal skill, soldering a joint)
- Attitude (such as a proactive approach to work)
- Attribute (such as absence of color blindness or perfect pitch)

By defining measurable behavior, you can indicate what a person (for example, an employee, contractor, applicant) within an enterprise can *do*. Identifying how a competence is exhibited in the work context ensures your approach is objective rather than subjective, adding to employee understanding of what is expected of them. It also ensures fairness and equality of employment. Competencies clarify what is needed from both teams and individuals.

Competence Measurement

Examples of competencies exhibited in the work context might be ’communication skills’, ’erecting and dismantling scaffolding’ or ’typing’. On their own though, these competencies do not give you the full picture. For example, a person may be able to demonstrate the competence erecting and dismantling scaffolding, but that does not tell you how proficient a person is in that competence. For example, do they erect and dismantle scaffolding as a beginner, or as an expert?

Other areas of ambiguity might include exactly which behavior is being measured. For example, the competence communication skills might mean that a person has technical, oral and written skills, or that they have the ability to communicate well.

Competencies are quantified and measured using:

- Proficiency levels: page 3 – 12 and behavioral indicators
- Rating scales: page 3 – 14

Competence Profiles

A competence profile is the list of competencies held by a person and the level of proficiency they display in these competencies. It is the basis for all analysis of competence information, including suitability matching and succession planning.

You can create and update competence profiles using either Oracle SSHR or the Forms interface.

Competence Delivery with Oracle Training Administration (OTA)

You can deliver competencies at a specific proficiency level through training activities your enterprise (or an outside supplier) provides. *Training activity* refers to any planned undertaking that improves a student's competencies (qualifications, experience, and so on).

> **Note:** You must purchase Oracle Training Administration separately to use this functionality.

Competence Validation and Driving Alerts

Use Oracle Alert's automatic mail notification to keep you informed when an employee's competencies need certification and renewal. This frees your time for more essential tasks. For example, use the competence Renewal Period to drive Oracle Alert—it compares the renewal period date with the date on the person's competence profile, or the last training class delivering the skill.

Proficiency Levels

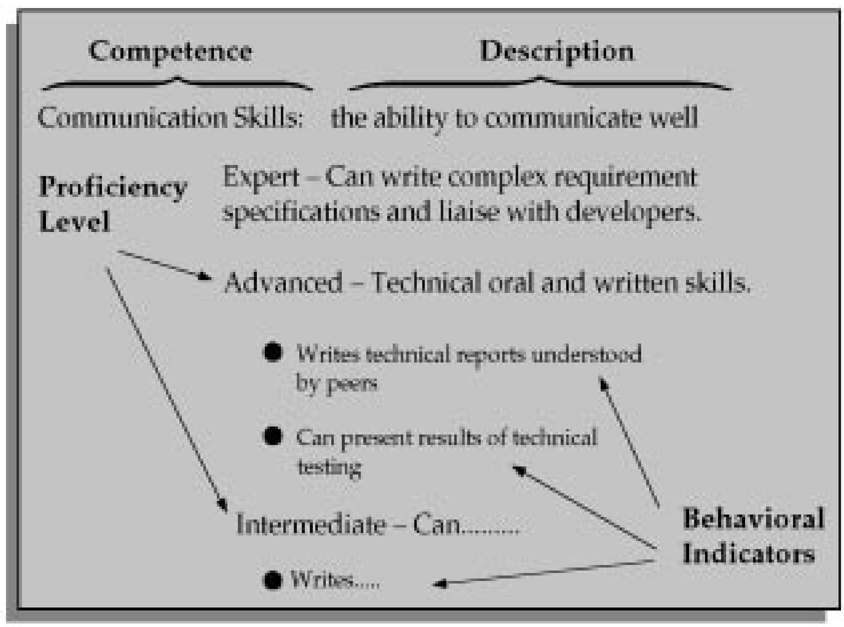
To enable you to fully express how a competence is exhibited, Oracle Human Resources enables you to identify the proficiency at which a competence is performed.

Behavioral Indicators

You can also associate behavioral characteristics displayed (known as *behavioral indicators)* with a competence. You can use behavioral indicators for any description that tells you or other managers what to look for in the work context. The text description can include what tests to use, what behaviors to detect, what questions to ask (for example, in a critical incident interview), when to review, and so on.

The figure shown here illustrates the descriptions, proficiency level and behavioral indicators for the competence Communication Skills.

Figure 3 – 1 Competencies, Levels and Indicators



Retrieval of Proficiency Levels

Once you set up proficiency levels for a competence, Oracle Human Resources retrieves the correct proficiency levels for you when you (or other users) perform any of the following tasks:

- Set up competence requirements
- Create or update a competence profile
- Perform an evaluation as part of the appraisal process

This not only saves you time, but also ensures that you always select the correct proficiency level for the task you are performing.

Rating Scales

Rating scales are used to describe competencies in a general way. Instead of defining proficiency levels for individual competencies, you use a general rating scale and text for measuring several competencies.

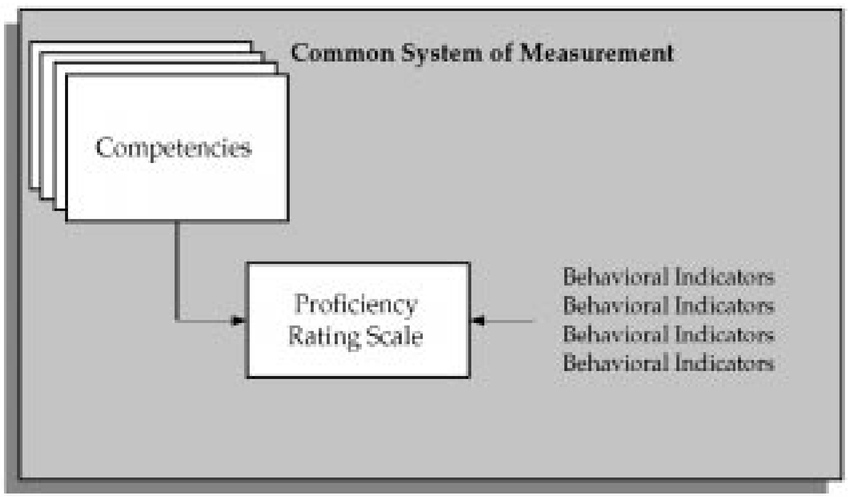
You can create general rating scales to determine:

- Proficiency. Identifies how a person exhibits a competence. For example, a scaffolder might be proficient at using a drill, or a person is proficient at drilling a hole.
- Performance. Identifies whether the person has achieved the proficiency, for example, can they drill well or not.
- Weighting. Identifies the level of importance of a competence.

A Common System of Measurement

The figure below illustrates the relationship between competencies and a general proficiency rating scale in a common system of measurement.

Figure 3 – 2 Common System of Measurement



If you decide to use the common system of measurement in your enterprise, we suggest that you use the same rating scale measurements throughout. For example, if you use rating levels of 1 to 3 for one rating scale, stick to this scale if you set up many scales with different proficiency levels.

Default Rating Scales

You can make one rating scale the default if you are going to link this rating scale to many competencies.

Rating Scale Attachments

You can add attachments to the rating scales, if required. For example, you can attach a competence description or a video of the skill.

Competence Measurement

Developing competencies as part of your performance management system enables you to design methods of measurement that match the culture and needs of your enterprise, without different parts of the enterprise expending time and effort in evolving similar definitions.

Oracle Human Resources enables you to structure your competencies in two ways:

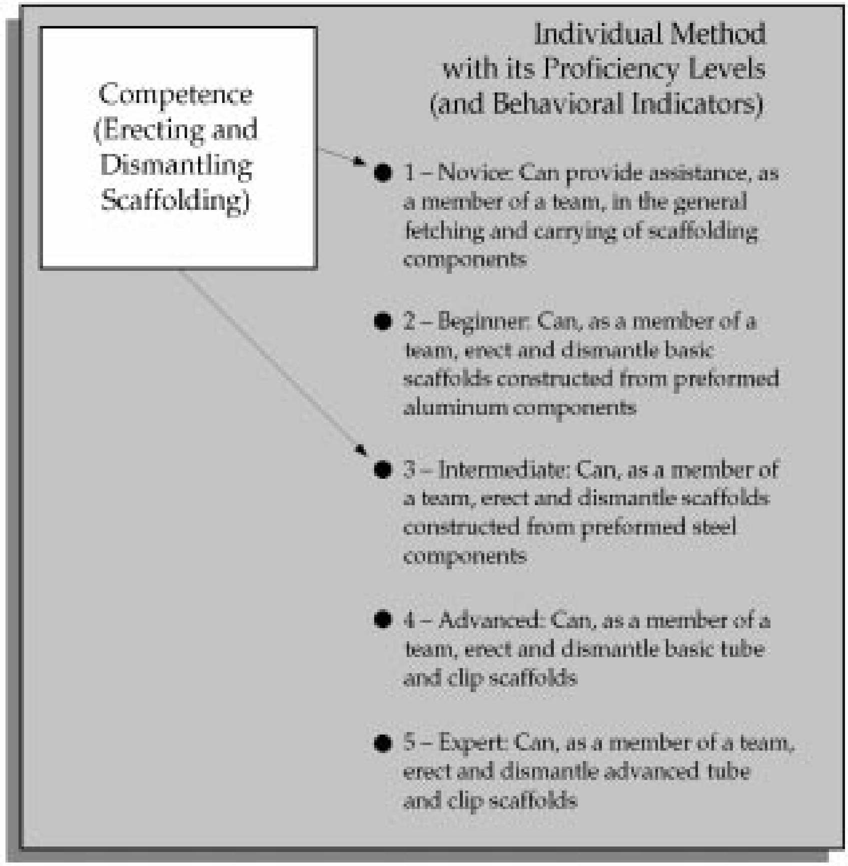
- Individual Method – Proficiency Levels: page 3 – 16. You attach proficiency levels to specific competencies.
- General Method – Rating Scales: page 3 – 17. You use a rating scale and enter text to describe the competence in a general way.

Individual Method – Proficiency Levels

If most of the competencies within your enterprise are comprised of proficiency levels unique to individual competencies, you might want to create competencies with their unique proficiency levels. You would therefore have a number of equivalent systems for measuring performance.

The following figure illustrates the competence Erecting and Dismantling Scaffolding using the individual method to structure your competencies. Notice the proficiency levels and behavioral indicators.

Figure 3 – 3 Individual Method

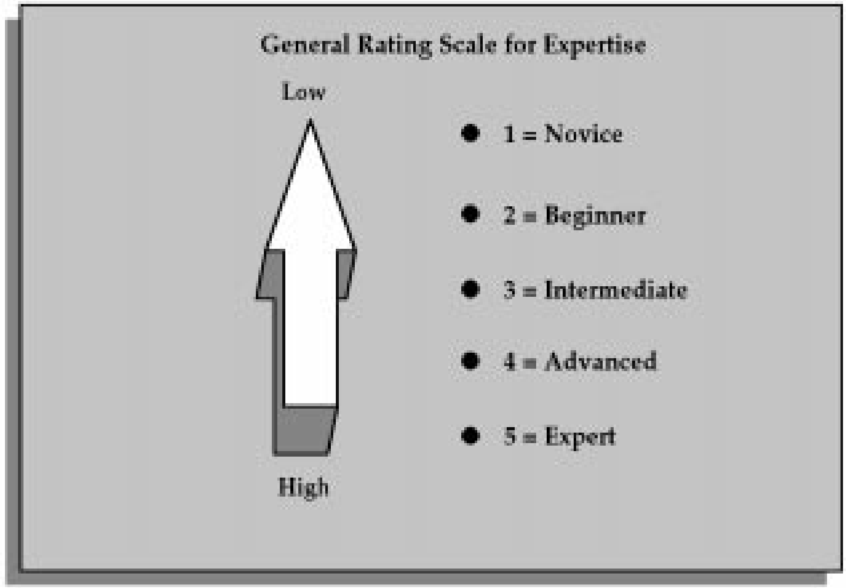


General Method – Rating Scales

Alternatively you can use the general method of measurement to structure your competencies. For example, you might decide to use a general method of measuring ’expertise‘, such as Expert, Intermediate and Novice. To do this, you could create a general rating scale, called Expertise, and hold the generic proficiency levels here.

The following figure illustrates a general rating scale with generic proficiency levels defined.

Figure 3 – 4 General Method



Which Method of Measurement Should You Use?

We suggest you employ the following strategy:

- Use the individual method if most of the competencies within your enterprise comprise proficiency levels unique to individual competencies. Then, you can create competencies with their unique proficiency levels, providing your enterprise with a number of equivalent systems for measuring performance.
- Use a general rating scale if a number of competencies within your enterprise have a common set of proficiency levels. You can then ensure consistency between measurements.

You can, of course, use a mixture of both, but whatever method you use, ensure that you give high numbers to high ratings (and low numbers to low ratings). You need to do this, for example, to ensure any bar charts you produce while performing competence gap analysis are useful.

Oracle gives you the flexibility of being able to use a general method to measure your core competencies, for example, and an individual method to measure specific job and position competencies throughout your global enterprise.

Competence Types

Because you might want to group related competencies together (for example, all your core competencies), Oracle Human Resources enables you to create competence types. This flexibility enables you to create competencies displaying complex behaviors, for example, management skills, or you can split management skills into several competencies, such as communication skills, presentation skills and oral skills. The degree to which competencies are grouped in this way is up to you!

> **Note:** If you do not group competencies into types, Oracle Human Resources groups them under the type of Others for you.

If you have used a competence type, for example, in an evaluation as part of an appraisal, you can query back and view it, but you cannot delete or add competencies to that type. This prevents you from accidentally deleting or adding competencies to groups in use.

Advantages of Grouping Competencies

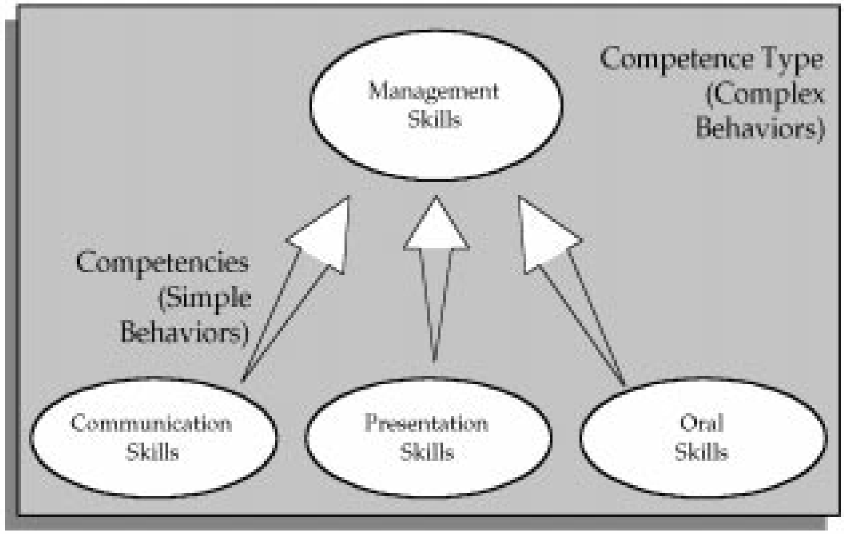
Grouping competencies is useful, for:

- Indicating which competence types and related competencies to include in an appraisal
- Advertising a vacancy and you want to include all 'hireable' competencies on a job advertisement
- Competencies for a team
- Reporting purposes
- Enabling easier access to particular competencies

You measure and evaluate behavior that a person demonstrates at the competence level, and not at the competence type level.

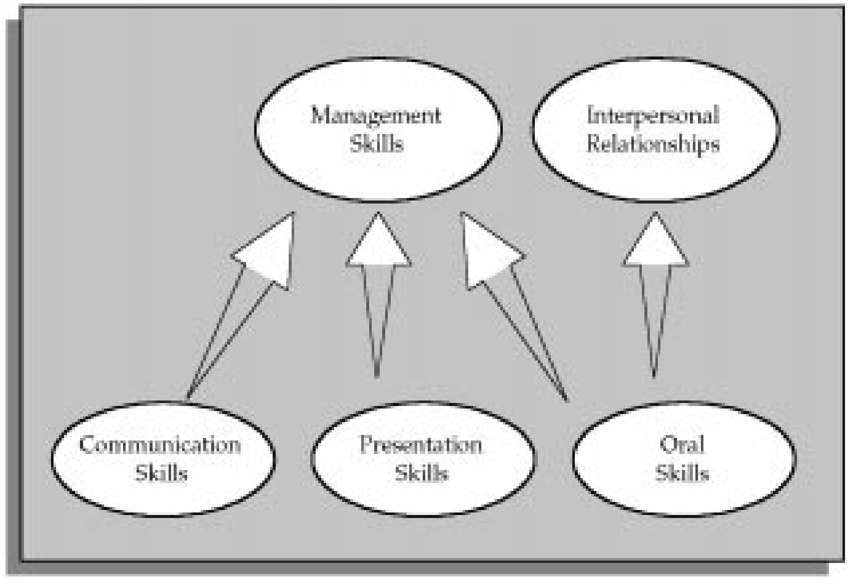
The following figure illustrates related competencies grouped by type Management Skills.

Figure 3 – 5 Grouping Competencies into Types



You can also group a competence into more than one competence type. For example, the competence Oral Skills can be grouped into both the Management Skills and the Interpersonal Relationships competence type.

Figure 3 – 6 Competencies Belonging to More Than One Type



Competence Requirements

To ensure your enterprise meets its current and future goals, you need to identify your competence requirements. For example, if your enterprise's goal is '*to gain greater penetration in the applications market*', you need to identify the competencies that employees need to possess and exhibit for the enterprise to meet that goal.

You can define your enterprise's competence requirements at the following levels:

- Business Group
- Organization
- Job
- Position
- One–time profiles (for suitability matching).

Defining your competence requirements enables you to devise an appropriate evaluation procedure as part of your appraisal process, and evaluate individuals against the competencies for selection, qualification or training and development purposes. You need to do this as comparison is the main driver for most HR activities, whether deployment, reward, incentives, succession planning, and so on.

Core Competencies

Defining your *core* (or *management* or *leadership*) competencies might be the first stage in developing a competence approach. Core competencies are the competencies that are required by every person to enable your enterprise to meet its goals. For example, the core competencies required to meet the goal *greater penetration in the applications market*, might include strategic thinking, quality orientation and customer awareness. You define core competencies at Business Group or organization level.

Business Group and Organization Competencies

Competencies held at Business Group or organization level only need to be defined once, then they are automatically displayed each time you select a specific organization or job, saving you from having to select them each time. It's easy to maintain high–level competencies, too.

Job and Position Competencies

Once you have identified your enterprise's core competencies, you might want to define individual job and position competencies later, for example, C++ programming, SQL*Plus, and such.

If you are holding competencies at position level and within the context of an organization or job, when you later select a position, the relevant competencies for the organization, job and position are inherited and displayed. Alternatively, you can hold competencies at position level and not within the context of an organization or job.

> **Note:** Whether to hold competencies at organization or job level, or to repeat them at position level, is an important implementation decision.

Competence Copying

You can copy core competencies and proficiency levels to the organization, job or position, saving you time. You can then make changes to the competencies, if required, for example, change the proficiency levels, enter a grade, or change the dates between which the competence is valid.

You can also copy competencies and proficiency levels from organizations, jobs or positions to other organizations, jobs or positions. This enables you to quickly and easily define your enterprise's competence requirements.

Essential Competencies and Suitability Matching

You can identify whether a competence is essential to an organization, job or position, or whether it is optional. If you indicate that a competence is essential, suitability matching will only retrieve the people who possess the competence at the specified proficiency level.

Grades and Competencies

You can identify different competencies for different grades, each with their accompanying proficiency levels. This enables you to keep a history of the competencies for an organization, job, position or grade over time.

You don't have to define requirements for each grade; if you leave the grade blank, it will apply across all levels.

Qualification Types

Competencies can have identified qualification methods, such as a license or a test, for example, a life–saving qualification or a degree. Oracle HRMS enables you to determine the qualifications recognized by your enterprise, including:

- All educational qualifications
- Licenses
- Awards
- Honors

Not only can you enter different types of qualifications, but you can also rank them, if required. For example, you could rank a Masters degree as 1, a degree as 2, school leavers' qualifications as 3, and so on.

You can also rank equivalent qualifications at the same level. This enables you to do ad hoc queries. For example, you can rank a degree and a vocational qualification as level 2. This is useful, for example, if you later want to find all people within the category of Education, with a qualification of 2 or above.

Schools and Colleges

You need to identify the schools and colleges that deliver the qualifications your enterprise recognizes. You can then record where a person gained the qualification. If you have not automatically loaded these schools and colleges into Oracle Human Resources, you can enter them manually.

You can also record the different sites or locations that comprise an establishment. This is useful, for example, where an establishment has several sites, colleges, campuses or locations.

> **Note:** As schools and colleges you enter are available to all Business Groups you create, you only have to load or enter them once.

Appraisals

Appraisal is usually part of the performance management process for gathering career information. An appraisal is where you set out, with an employee, information about themselves or about the business, or from one person about another. It sets objectives for a person and defines improvement actions to meet objectives or long–term goals, such as promotions.

An appraisal normally contains a set of objectives, success criteria, an assessment of an employee's competencies, strong and weak points in the workplace and an action plan.

You might use appraisals for:

- Benchmarking employee capabilities at the start of an implementation as a one–time exercise
- Traditional annual or periodic reviews in many formats
- Evaluation after an event such as a retraining exercise, to test the effectiveness of training
- Maintaining a career plan
- One–time data gathering such as training re–design
- Assessing employees at the end of a new hire or new job probationary period
- Gathering exit information
- Project or engagement based appraisals
- Assessing business wide values
- Conducting position or project specific tests, such as product knowledge

Appraisal Templates

You create an appraisal template to name, hold and configure an appraisal. You do this using HRMS applications forms.

You include some or all of the following components in the template:

- Instructions on how to complete an appraisal.
- A questionnaire. Typically used to record supplementary information in a 360 Degree appraisal or as a method to conduct employee surveys.
- A rating scale.

- An assessment template.

Depending on how you configure the appraisal template you can control precisely how the appraisal is used.

Appraisal Types

The different types of appraisals in SSHR are Manager–Employee, 360 Degree (Self initiated or Manager–Employee initiated) and Self–Appraisal (Employee initiated).

Manager Employee Appraisals

The Manager–Employee appraisal is designed for a manager to appraise the performance of an employee. You can also use Manager–Employee appraisals whenever you need to perform a one–to–one appraisal.

A one–to–one appraisal is useful when a manager performs an annual review of an employee's performance, for example. For this type of appraisal, a manager initiates a new appraisal by selecting a person from the People List. The appraiser can then create a list of reviewers to whom copies of the appraisal can be sent. Reviewers are sent a workflow notification of their participation. The notified reviewer (often a manager) can review and add review comments to the appraisal.

The appraisee cannot view any part of the appraisal until the manager publishes it. Once published, the entire appraisal, except reviewer comments (but including the list of reviewers), is visible to the appraisee.

> **Note:** The reviewer does not have to be a manager. Anyone in your organization can perform appraisals.

360 Degree Appraisal (Manager–Employee)

A 360 degree appraisal is an appraisal with multiple participants and is sometimes known as a group appraisal. This type of appraisal can include other managers in the appraisal process, as well as appraisal reviewers, for example colleagues or customers.

> **Note:** 360 Degree appraisals are the only type of appraisal that use Questionnaires as only 360 Degree Appraisals have many participants.

A 360 Degree Manager–Employee appraisal is initiated by a manager. The initiator of this type of appraisal can assign appraising managers and appraisal reviewers to the appraisal.

Participating managers are notified of their participation. Each manager completes their own version of any questionnaire and submits it to the Appraising Manager who has access to all the completed questionnaires.

Participating reviewers and appraisers are notified of their participation. Reviewers can only add review comments to the appraisal. Appraisers can only answer a questionnaire.

The Appraising Manager can always view the appraisal questionnaires and reviewer comments. A key component of all 360 degree appraisals however, is the confidentiality of all appraisal contents, an appraisee never sees the contents of an individual participants completed questionnaire.

360 Degree (Self Appraisal)

A 360 degree self appraisal is a 360 degree appraisal initiated by an employee. The employee can select managers and reviewers to take part in the appraisal.

> **Note:** You can set a workflow attribute to make the employee selection of appraisers subject to an approvals process. You can also set a profile option so that an employee's immediate supervisor, and anyone with secure access to an employee's record's, can view all unpublished employee 360 Degree Self Appraisals. This profile option only applies to 360 Degree Self Appraisals, not Manager–Employee Appraisals.

In a 360 Degree Self Appraisal the employee (self appraiser and initiator) can access and update the Competence Evaluation region. This enables the employee to enter their own subjective scores for their own competencies. An employee has no access to the Overall Performance Rating Region in a 360 Degree Self Appraisal.

> **Note:** The Overall Performance Rating Region is used to score the overall performance rating.

Self Appraisal

Self–appraisals are initiated by employees who want to rate their performance and is private until published by the employee. The self–appraisal function is started either by clicking the Self Appraisal link under the Employee responsibility or by selecting one's own name from the People List (i.e. under a manager responsibility). A self–appraisal is visible only to the appraisee until published. When an employee selects Publish, from the drop down list in the appraisal overview page, their manager can view the completed appraisal as can any manager who can select the employee from the People list.

In a Self Appraisal the self appraiser can access and update the Competence Evaluation region. This enables the appraiser to enter their own scores for their own competencies. A self appraiser has no access to the Overall Performance Rating region.

> **Note:** The Overall Performance Rating Region is used to score the overall performance rating.

Configuring the reviewer notification process

The Appraisal Notify Reviewer workflow process send notifications to reviewers and to 360 degree appraisal participants.

What Else Can You Include in an Appraisal?

You can include an assessment (also known as competence evaluation) as part of your appraisal process. An assessment enables you to measure and record a score of how a person has performed against a given set of competencies. This provides clear and accessible measures, for example,"Is the person demonstrating the specified behavior at the level defined? ".

Some assessments simply ask one or more people to rate a person according to some agreed scale. In others, questionnaires may be devised that ask about different aspects of the person's work.

To enable you and other users to perform an assessment as part of an appraisal, you can create assessment templates for all the different evaluations your enterprise performs. You do this using HRMS applications forms.

Proficiency v Performance

Using the assessment template, you can identify the pre–defined set of competencies to be assessed for proficiency or performance. You then include the assessment template in the appraisal template.

A proficiency–based appraisal measures the expectation of the level to which a person exhibits a competence. For example, in an Engineering Grade 1 appraisal you might evaluate that a person is proficient at using a drill, or that a person is proficient at drilling a hole. You also set future expectations, for example, that within the next 6 months, they will have achieved proficiency in milling.

A performance assessment measures whether the person has achieved the proficiency, for example, can they drill well or not. You can also rank performance, for example, on a scale 1–5.

Rating Methods and Assessment Scores

The methods available for rating a person in an assessment are:

- Proficiency
- Performance
- Proficiency and Performance

When you perform an assessment for a person, you record a score against each competence (within the framework of a job or position). Oracle Human Resources gives you the freedom to calculate the scores in a variety of ways to fully meet the needs of your enterprise. For example, you might want to calculate the scores just by taking performance against the competencies into consideration, or you might want to calculate the scores by taking performance, proficiency and weighting into consideration, and to apply the weighting to proficiency. You can only apply weighting to performance or proficiency, not to both.

To make it easier for you, we provide several assessment types for you to choose from. These are:

Assessment Type:	**Calculates Score By:**
Performance	Performance
Proficiency	Proficiency
Proficiency and Performance	Proficiency x Performance
Proficiency and Performance, with Weighting applied to performance	Performance x Weighting
Proficiency and Performance, with Weighting applied to proficiency	Proficiency x Weighting
Performance with Weighting applied to performance	Performance x Weighting
Proficiency with Weighting applied to proficiency	Proficiency x Weighting

You can automate scoring, if you want. You can create an overall total, an average total, or a weighted total or average for both performance and proficiency.

Using Forms and SSHR to Create and Perform Appraisals

You create and perform appraisals using a mixture of Oracle HRMS forms and Oracle Self–Service Human Resources (SSHR) web pages. This mixture provides you with both the ’professional’ forms interface as well as the full configurabilty of SSHR to enable you to design appraisal pages to meet the needs of your enterprise.

When you design your appraisal, you include header details, such as the appraisal date, the type of appraisal.

Component:	Create this using the:	Required
A set of user instructions to provide guidance on how to conduct the appraisal and complete the sections, particularly the questionnaire.	Appraisal Template (HRMS)	Y
A performance rating and comments on performance	Assessment Template (HRMS)	N
A set of objectives for the employee and success criteria, which can be monitored and assessed	Create an Appraisal (SSHR)	N
A predefined set of competencies to be assessed for proficiency or performance by one of a number of different evaluation methods	Assessment Template (HRMS)	N
A questionnaire web page containing fields that can be configured by the user to hold the answers to any number of questions, such as listing strengths and weaknesses, career plans or questions about training	HTML editor (SSHR)	N
A print page that summarizes all appraisal information at a glance for quick review and printing	View / Print Appraisal (SSHR)	Y

Note: You create questionnaire web pages using an HTML editor, then use SSHR to upload the questionnaire for subsequent use in appraisals. You can include multimedia images in the questionnaire, but you must upload these images into the central server.

The originator of the appraisal can also specify the people to whom the appraisal is to be routed when it is ready for other contributor input, to change reviewers and to end further input.

What Happens to the Information Collected During an Appraisal?

During an appraisal, Oracle HRMS enables you to measure how an employee has performed against each competence, and at what level.

You are then ready to record the employee's accomplishments in the competence profile. (You could also use APIs to automate the process.) You can keep the competence profile up–to–date by entering results when an employee first joins the enterprise, and then after each appraisal. Through the web and workflow–based access, employees are involved in the process of planning, managing and reviewing their own progress.

Once an appraisal is complete and published, managers and employees (with secure access) have available to them a full history online.

See: Person Search, *Implementing Oracle Self–Service Human Resources*

Suitability Matching

Once your employee competencies and proficiency levels are held in competence profiles (and job requirements in their own profile), you can use Oracle SSHR to compare a person's competence profile with the requirements of a "work opportunity".

People and work needs can be compared in many different ways:

Work–Centric

- Take a selected group of people and rank them against the requirements of a selected organization, job or position, whether vacant or currently occupied
- Take a selected vacancy and compare applicants for that vacancy with the needs of the job and position
- Take a position and compare successors for that position
- Take an organization, job or position and compare current occupants with the needs of the role

Person–Centric

- Take a person and compare vacancies that person has applied for
- Take a person and compare succession options for that person
- Take a person and compare their current assignments

You can then identify areas where you need to recruit or train employees. You can also affect motivation by various types of incentive, whether monetary– or opportunity–based.

Refining a Suitability Search

You can refine a suitability search by specifying that you want to search for people with a proficiency level in a specific competence, at a required level and above (or below).

To restrict your search further, you can determine the match type by identifying required and optional competencies and work choices.

Succession Planning

You can nominate many successors for a position over different periods of time. Conversely, you can identify many different succession options for one person.

You can select potential candidates for a key position. To do this, select a group of people and compare their competencies graphically against the competence requirements of the position. You can then create a short list of people, add them to your 'working list' and compare them against current successors if you want.

Assessment Scores and Recruitment

You can use assessment for suitability searches to fill a job or position. This can be performed during recruitment, succession planning, and so on. You can search by:

- People
- Jobs or positions

See: Suitability Matching: page 3 – 31

Reporting and Analysis

Even though much of the information is configurable, each user defined field is identified uniquely in the database, and so can be used for reporting and analysis.

Career and Succession Planning

Having identified an employee's aspirations during their appraisal, you will want to prepare them for their next position within a career plan and keep them motivated by linking their own career aspirations to enterprise aspirations. By planning careers and succession, you enable employees to see their future role within the enterprise, keeping them motivated, and prevent you from lengthy and costly recruitment.

A succession plan can help you identify training and development needs for an employee. This means you can train a potential successor to have exactly the right skills on their succession to a position.

Career and succession planning also enables you to highlight scarce competencies within your enterprise. Once you have identified these competencies, you can develop them and replace current employees as required.

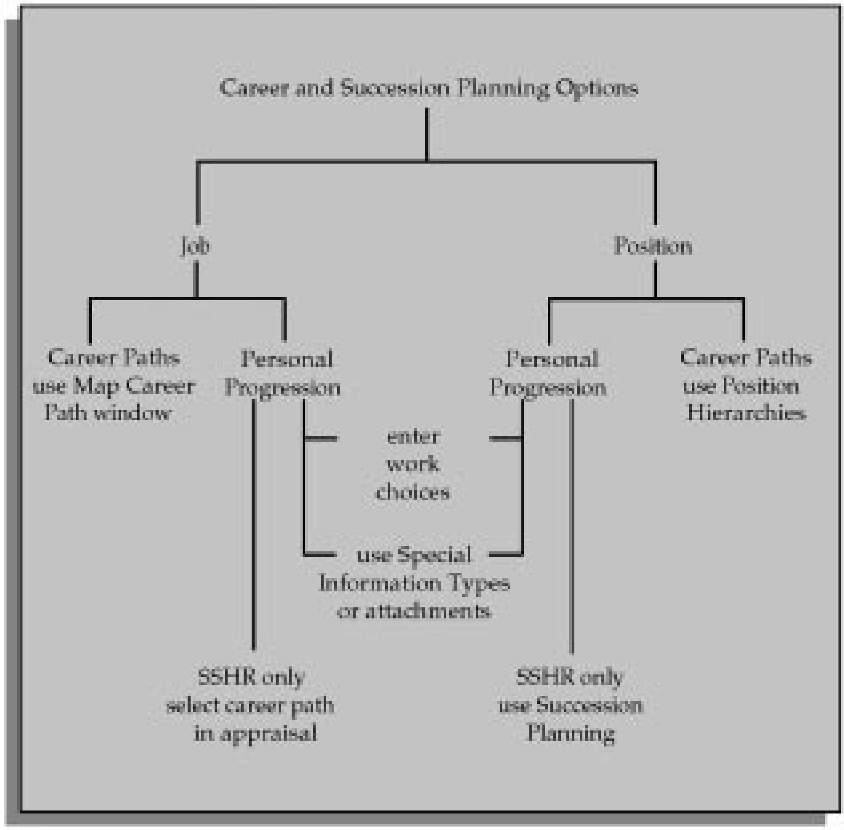
With suitability matching you can rank an employee's competencies. Search tools, in SSHR, enable you to rank by organization, job or position. You can also identify suitable work for a person.

See: Person Search, *Implementing Oracle Self–Service Human Resources*

You can model careers and succession plans based on either jobs or positions.

The figure illustrates the different models you can select from.

Figure 3 – 7 Career and Succession Planning Options



Work Choices

Using work choices (also known as work preferences), you can track the capacity of an employee, applicant, contractor or ex–employee to be deployed within the enterprise.

You can record a person's work choices, such as their willingness to travel or relocate, their preferred working hours and work schedule, and the length of time they would like to stay in their next post. You can then compare these choices with the work requirements of jobs or positions when you are planning redeployment.

Succession Planning and SSHR

If you are using the Line Manager responsibility in Oracle Self–Service Human Resources (SSHR), you can use additional features for holding succession plan information. You can:

- Identify many potential successors for a position. You do this by comparing the competencies of a group of people with the competence requirements of the position.
- Identify many different succession options for one person.

Once you have a short–list of successors to a position, you can perform a graphical suitability match to show training needs or to rank potential successors.

You will find the SSHR Suitability Matching tool useful when succession planning. The suitability matching function compares and ranks a person's competencies. Search tools enable you to find the best person for a job or position. You can also compare and rank a person's ability in current organizations, jobs or positions and identify suitable work for a person.

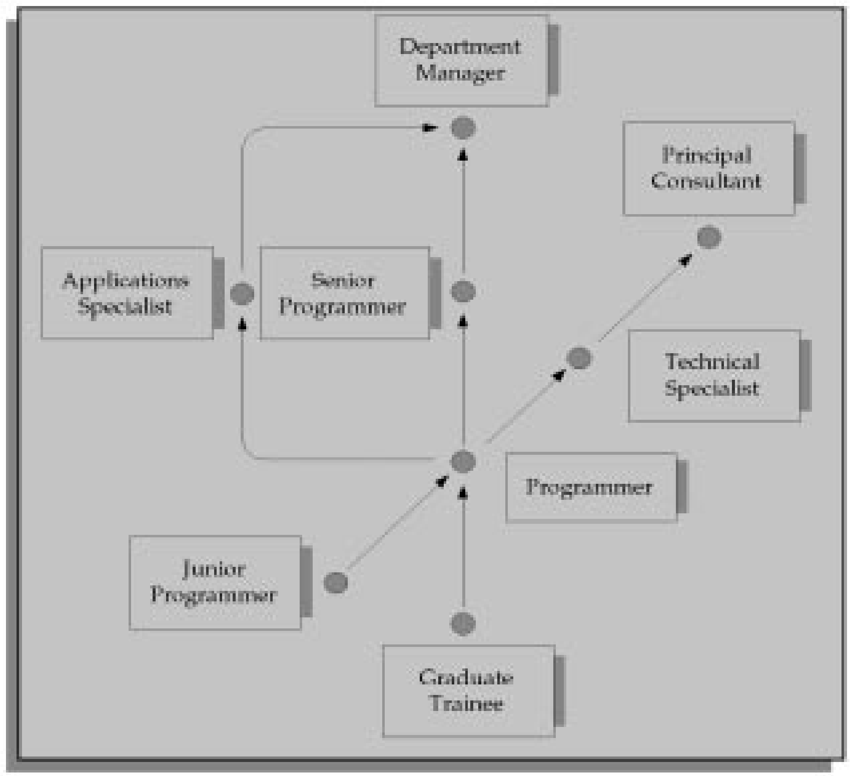
You will often use the Suitability Matching and Succession Planning functions together. You may for example use Suitability Matching to rank a person's competencies and then use Succession Planning to find a position this person can fill or can be trained to fill.

Career Paths

A career path shows a possible progression to one job or position from any number of other jobs or positions. Career paths must be based on either job progression or position progression. You cannot mix the two. Career paths are based on the structures of your enterprise rather than the people you employ.

You can define as many career paths as you require, perhaps reflecting an individual's career priorities (such as a Management Path and a Technical Path). You build career paths from the top down. You can only enter a job or position once in any career path.

Figure 3 – 8 Career Paths



Career paths based on job progression are built using the Map Career Path window.

See: Defining Career Paths: page 3 – 62

Career paths based on position progression are built using position hierarchies.

See: Creating a Position Hierarchy, *Using Oracle HRMS – The Fundamentals*

Lines of Progression for AAP Reporting (US Only)

If you are in the US, Oracle HR includes a special use of career paths based on jobs. For the AAP–Workforce Analysis report, you build career paths for jobs to constitute the *lines of progression* this report requires. You define these career paths just as you would any others based on jobs.

Career and Succession Plan Modeling Based on Jobs

If your enterprise's career and succession planning is based upon jobs, you can use career paths to show possible progressions to one job from any number of other jobs.

Appraisals on the Web

If you are using Oracle Self–Service Human Resources (SSHR) you can, with a Line Manager responsibility, select a career path for a person as part of the appraisal process. When you create the appraisal questionnaire, you create a list of values that contains the alternative career paths that can be selected for a person during an appraisal.

Special Information or Attachments

If you are not using SSHR with a Line Manager responsibility, there are other ways to hold information about successor jobs against a person. For example:

- You can define a special information type to hold time intervals (such as immediate, three years, five years) and job names. You can also use the Job Requirements window to record people's names against each job for each time interval.
- An alternative approach is simply to record this information as text in comments or a word processed document attached to each employee's record.

Career and Succession Plan Modeling Based on Positions

If your enterprise's career and succession planning is based upon positions, you can create additional position hierarchies to show any type of progression. These might represent existing line management structures, or even cut across departmental or job–type boundaries.

Succession Planning on the Web

If you are using Oracle Self–Service Human Resources (SSHR), with a Line Manager responsibility, you can use the Succession Planning option. You can select a person's next position(s), or view their current position and see who is to succeed to that position.

Special Information Types or Attachments

If you are not using SSHR and Line Manager responsibility, there are other ways to hold information about successor positions against a person. For example:

- You can define a special information type to hold time intervals (such as immediate, three years, five years) and position names against an employee. You can also use the Position Requirements window to record people's names against each position for each time interval.
- An alternative approach is simply to record this information as text in comments or a word processed document attached to each employee's record.

The Special Information Approach to Skills Matching

From Release 11 onwards, the recommended approach to holding and matching skills information is to define a framework of competencies. These provide the common language for a wide range of human resource activities including assessments, appraisals, employee profiling, career development, and recruitment. You can build up a wealth of skills information that can be maintained and used by employees and line managers themselves, using the web Direct Access interface.

However, Oracle HRMS continues to support the earlier approach to handling skills information, using Special Information Types. This is an alternative to the competence approach.

What are Special Information Types (SITs)?

Special Information Types are a flexible way to hold additional information you require about people and, if necessary, to compare this information with the requirements of jobs or positions. For each Special Information Type you can define up to thirty fields to hold details of competences, professional qualifications, education, and valid experience. For each person, job, or position, you can make multiple entries for each Special Information Type.

For example, suppose you want to store details of technical skills. You could set up the following fields:

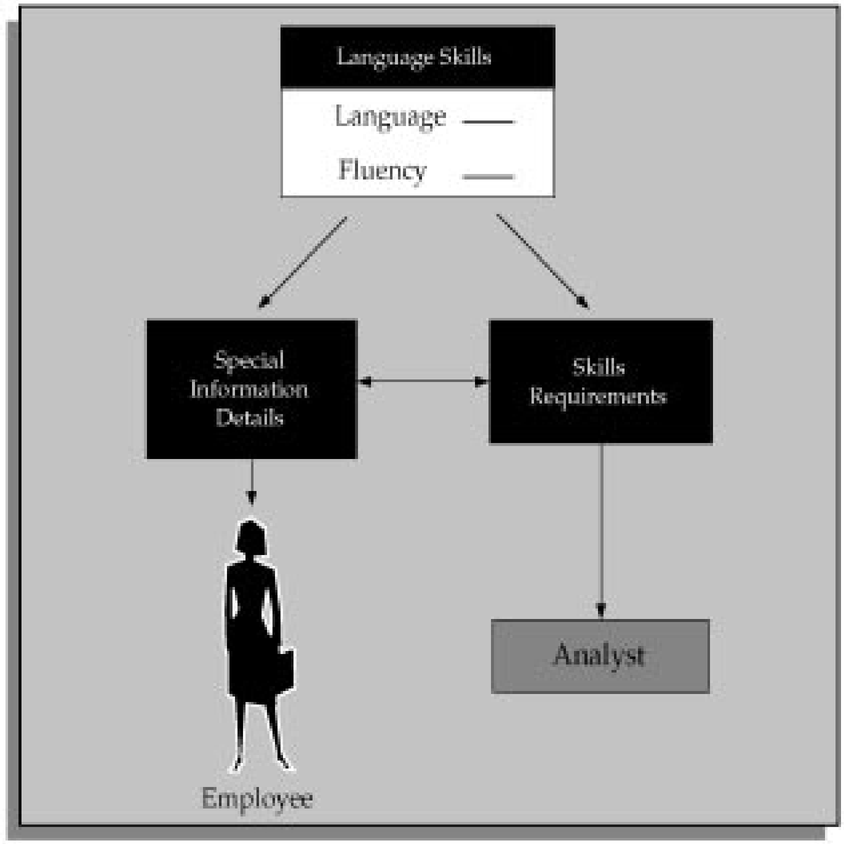
- Skills – with a list of valid values to control the vocabulary used to describe the skills
- Years Experience – to hold the number of years of experience in using the skills

You can display the fields you define in one or more of the following windows:

- Special Information, to record skills or experience for an employee or applicant
- Job Requirements, to hold skill requirements for a job
- Position Requirements, to hold skill requirements for a position
- Skill Provisions, to record the skills or qualifications provided by training activities in Oracle Training Administration

Using views and reports, you can then match people to posts, according to their skills or other attributes.

Figure 3 – 9 Matching Skills Requirements to Special Information



Tips for Defining Special Information Types to Hold Skills Information

- If you want to give different sets of people access to different categories of skills information, define each category as a separate Special Information Type. You can customize the Special Information window to display just one Special Information Type.
- If you want to match on a *range* of skills levels, it is easier to use numeric values. Use a description field to provide the meaning for each level. The description appears automatically when the number is chosen.
- You can use cross–validation to ensure that users enter correct combinations of segments. For example, you could ensure that when a language skill is entered, a fluency level is also selected.

- You can speed up data entry and minimize errors by defining an ’Alias’ for common combinations of segment values. For example, completion of a course may always result in a specific certificate from a particular licensing body. A user could enter all of these values with a single Alias.
- If you want users to enter the precise title of a qualification (perhaps read from a resume), you cannot supply a list of values. However, consider providing additional fields with lists of values using broad terms such as ’degree–level’ or ’science’ to help users searching for information.

Unstructured Information

You may want to hold some skills information, such as resumes, as unstructured, free text information. You can store this information as attachments to the People and Special Information windows.

Skills Matching Report

The standard Skills Matching Report matches people against all the requirements you have entered for one job or position (held in Special Information Types).

The List People By Special Information window displays a list of people who match a particular profile for one Special Information Type.

Event and Attendance Administration

You can use the events and attendance administration features in Oracle Human Resources to:

- Set up events
- Book employees and applicants onto events
- Record information about employee interviews, such as disciplinary hearings and performance reviews

  Note: The system administrator can create customized versions of the Event Bookings window so that you use one version for employees and another version for applicants.

Event Bookings and Attendance

You can view all the events a person has attended or is scheduled to attend in the Book Events window. You can also enter new bookings here.

Employee Reviews

You can use the Employee Review window to record information about any employee interview, such as a performance review, disciplinary hearing, or medical test.

To prepare for a performance review, you can view the employee's:

- Career history, using the Assignment History window

  See: Viewing Assignment History: page 1 – 85

- Likely career paths or succession plans

  See: Career and Succession Planning: page 3 – 33

If you are using Oracle Self–Service Human Resources (SSHR), you can use web–based access to complete assessment and appraisal templates for your employees.

Events, Reviews and Competence Profiles

If you have adopted the competence approach, you can use events or reviews as an opportunity to update your employees' competence profiles. For example, you may decide that employees' attendance at a team–leading seminar provided them with the Team–Leading competence at level 1. Once you have determined the competencies delivered by the event, you can update the appropriate employees' competence profiles.

Events and Oracle Training Administration (OTA)

Oracle Training Administration (OTA) provides all the power and flexibility you need to schedule, administer and track training events.

See: Event Schedule Overview, *Using Oracle Training Administration*

Creating a Rating Scale

Use the Rating Scales window to create general rating scales.

▶ **To create a rating scale:**

1. Enter a name and description for the rating scale, for example, Expertise.
2. Select the type of rating scale to create, for example, performance, proficiency or weighting.
3. Click the Default Rating Scale box if you want to make this rating scale the default, otherwise leave this box blank.
4. Enter the first level and description for the rating scale. For example, enter **1** in the Level field and **Novice** in the Name field.
5. Enter the behavioral indicator for that level. For example, Meets expectations.

   You can enter up to 2000 characters for each behavioral indicator.
6. You can add attachments to the rating scales, if required. For example, you can attach a competence description or a video of the skill.
7. Continue to enter levels and description for the rating scale then save your changes.

Creating a Competence

Use the Competencies window to create competencies.

▶ **To create a competence:**

1. Select the New button in the Find window.
2. Enter a name and description for the competence.

   Suggestion: We suggest you enter a short description of the competence, for example, ”listening skills”. Then, enter a longer, more detailed description. For example, you could describe how the competence is used in the workplace.

3. Enter the dates between which the competence is valid. You must enter a From date but you can leave the To date blank. If you enter a To date, ensure that the valid period is wide enough to cover any competence elements you may need to create.
4. If you want to use a general rating scale to measure the competence, go to Entering a Rating Scale: page 3 – 46. If you want to measure the competence against specific proficiency levels, go to Entering Proficiency Levels: page 3 – 46.

Entering a Rating Scale

5. Click the Scale radio button to use a rating scale to measure the competence.
6. If you set up a default rating scale, it displays automatically for this competence, otherwise select one from the list. You can delete the defaulted rating scale and select another one, if required.
7. Select the Levels box if you want to check the proficiency levels for that rating scale, otherwise go straight to Entering Competence Details: page 3 – 47.

Entering Proficiency Levels

8. Click the Levels radio button to enter proficiency levels and behavioral indicators for the competence.
9. Select the Levels button and enter the first proficiency level and description. For example, enter **0** in the Level field and **No Skill** in the Name field.
10. Enter the behavioral indicator for that level, for example, ’**No knowledge/expertise of scaffolding**’. You can enter up to 2000 characters for each behavioral indicator.
11. Continue to enter proficiency levels and behavioral indicators, then go to Entering Competence Details: page 3 – 47.

Entering Competence Details

12. Select the main method of evaluating the competence, for example, written examination or observation.

13. Enter a number and select a length of time to identify how often you need to evaluate the competence. For example, enter 5 and select Year if you have to evaluate the competence every 5 years.

14. Click the Certification Required box if you need a certificate to confirm possession of the competence. For example, you may need proof of a driving license.

    If you click this box, when you or another user later indicates that a person possesses this competence (using the Competence Profile), you must enter the certification method and date.

15. Save your changes.

Querying a Competence

When you navigate to the Competencies window, the Find Competencies window automatically displays in front of it.

▶ **To query a competence using the Find Competencies window:**

1. Do one or both of the following:
   - Enter a full or partial query on the competence name.
   - If relevant, enter a query on the organization, job or position.
2. Choose the Find button.

   Oracle Human Resources displays the competence for you to check.

Grouping Competencies into Types

Use the Competence Types window to perform this task.

In order to perform this task, competence types must have been defined using the Lookup type COMPETENCE_TYPE.

▶ **To group competencies into types:**

1. Query the competence type under which you want to group competencies.
2. Select the first competence to group within the competence type.
3. Continue to enter competencies to group within the competence type, then save your work.

Defining Competence Requirements – Core or Generic Competencies

Use the Competence Requirements window to define your competence requirements with core or generic competencies.

▶ **To define competence requirements (with core or generic competencies):**

1. Select the Business Group for which you want to create competence requirements.
2. Choose the Find button. Oracle Human Resources retrieves competencies if you have previously defined them as required for the Business Group, otherwise it retrieves nothing.
3. Choose Clear Record after you have looked at the existing competencies.
4. You can now do the following:
   - Create Competence Requirements for the Business Group: page 3 – 50
   - Copy Existing Core Competencies to an Organization, Job or Position: page 3 – 50

Create Competence Requirements for the Business Group

1. Select the first competence.
2. Select the highest and lowest proficiency levels at which the competence is acceptable, if required.

   If you are going to copy these requirements to an organization, job or position, you can choose not to copy these proficiency levels over.
3. Check the Essential check box if the competence is essential for this Business Group, otherwise, leave the box unchecked.

   > **Note:** Only enter a grade if you are creating competence requirements for a job or position.
4. Enter the dates between which the competence is valid for this Business Group. You must enter a From date but you can leave the To date blank.
5. Continue to enter competencies for the Business Group, then save your changes.

Copy Existing Core Competencies to an Organization, Job or Position

1. Clear the details from the Business Group before you copy the competencies.

2. Select the organization, job or position to which you want to copy the core competencies and choose the Find button.

3. Choose the Copy Competencies button. A Copy Competencies window appears.

4. Leave the Core Competencies box checked.

5. If you want to copy the proficiency levels, leave the Copy Levels box checked, and enter the dates between which the competence is valid (you must enter a From date but you can leave the To date blank). If you do not want to copy the proficiency levels, uncheck the box.

6. Choose the Copy button, and Oracle Human Resources copies the competencies to the organization, job or position.

7. If required, make changes to the competencies you have copied. These can include the following:

   - Deleting any of the core competencies that are not required by the organization, job or position
   - Changing the proficiency levels
   - Checking or unchecking the Required check box
   - Entering a grade (for a job or position only)
   - Changing the dates between which the competence is valid

8. Save your changes.

Defining Competence Requirements – No Core Competencies

Use the Competence Requirements window to define your competence requirements with no core or generic competencies.

▶ **To define competence requirements (no core competencies):**

1. Select the organization or job for which you want to create competence requirements. If you are creating competence requirements for a position, you must also select the organization and job to which the position belongs.
2. Choose the Find button.

   Oracle Human Resources retrieves competencies if you have previously identified them as required, otherwise it retrieves nothing.
3. Select the first competence.
4. Select the highest and lowest proficiency levels at which the competence is acceptable, if required.

   If you are going to copy these requirements to other organizations, jobs or positions, you can choose not to copy these proficiency levels over.
5. Check the Essential check box if the competence is essential, otherwise, leave the box unchecked.
6. Select the grade (for a job or position only), if required.
7. Enter the dates between which the competence is valid. You must enter a From date but you can leave the To date blank.
8. Continue to add further competencies for the organization, job or position, if required.

Copying Competencies

You use the Competence Requirements window to copy competencies from an organization, job or position.

▶ Copying the competencies from an organization, job or position

1. Select the organization, job, or position to which you want to copy the competencies.
2. Choose the Find button.

   Oracle Human Resources retrieves any competence requirements previously created.
3. Choose the Copy Competencies button. A Copy Competencies window appears.
4. Uncheck the Core Competencies box. The organization, job and position fields are now active.
5. Select the organization, job or position from which you want to copy the competencies.
6. If you want to copy the proficiency levels, leave the Copy Levels box checked, and enter the dates between which the competencies are valid. You must enter a From date but you can leave the To date blank. If you do not want to copy the proficiency levels, uncheck the box.
7. Choose the Copy button, and Oracle Human Resources copies the competencies.
8. You can make changes to the competencies copied over, such as:
   - Deleting any of the core competencies that are not required by the organization, job or position
   - Changing the proficiency levels
   - Checking or unchecking the Required check box
   - Entering a grade (for a job or position only)
   - Changing the dates between which the competence is valid
9. Save your changes.

Viewing Competence Requirements at Organization, Job or Position Level

Use the Competence Requirements window to view competencies required at organization, job or position level.

▶ **To view competencies required at organization, job or position level:**

1. Select the Business Group, organization, job or position for which you want to view competencies,.
2. Choose the Find button.

Creating Qualification Types

Use the Qualification Types window to create the qualifications that are recognized by your enterprise.

Before you start this task, you must define generic qualification types as values for the Lookup Type PER_CATEGORIES.

▶ **To create qualification types:**

1. Enter the name of the qualification, for example, a Masters degree.
2. Select the type of qualification, for example, educational, honorary.
3. If required, rank the qualification, for example, 1 for a Masters degree.
4. Continue to enter and rank qualifications, then save your changes.

Creating Schools and Colleges

Use the Schools and Colleges window to enter the establishments that deliver the qualifications recognized by your enterprise.

▶ **To create establishments:**

1. Enter the name of the establishment.
2. Enter the name of the location.
3. Continue to enter establishments, then save your changes.

Creating an Assessment Template

You can tailor the actual layout of the evaluation page to meet the needs of your enterprise. For example, you can identify:

- The type of evaluation you are performing, for example, performance or proficiency.
- The competence types and competencies against which to evaluate, and the sequence in which you want them to appear.
- The instructions to be displayed to the evaluator(s) or approver(s).
- How you want to calculate the total scores. For example, you may wish to calculate a total score or an average score.

When you are setting up templates for any type of proficiency–based evaluation, you have previously identified the proficiency levels or a rating scale with which to measure competencies. Performance scales are therefore remembered by Oracle HRMS. If you are setting up templates for any type of performance–based assessment, you need to indicate the performance scale to use in the assessment.

Use the Assessment Template window to create templates for use in competence–based appraisals.

▶ To create an assessment template:

1. Enter a name and description for the assessment you are setting up. You can enter up to 85 characters for the name.
2. Enter the instructions to be displayed to the assessor(s) or approver(s). For example, "Complete all parts of the assessment before passing it on to the next person in the chain". You can enter up to 2000 characters for each assessment type.

   Suggestion: You can enter the text directly, or if you want it formatted, write it using an HTML editor and then paste it here. Then, the text appears exactly as you want it.

3. Enter the dates between which the assessment template is valid. You must enter a From date but you can leave the Until date blank.
4. Select the type of assessment template you are creating, for example, proficiency with weighting applied.

   If you are setting up proficiency–based assessment templates, Oracle HRMS recognizes that you previously identified proficiency levels or a rating scale, and the Performance Scale fields are grayed out.

If you are setting up performance–based assessment templates, you need to indicate the performance scale to use in the assessment.

5. For any type of performance–based assessment, select the performance scale for use in the assessment.

   Choose the Performance Scale button to see the proficiency levels for that scale, if required.

6. Enter comments in the Comments field, as required.
7. For all types of assessment, select the weighting scale for use in the assessment, if required.

   Choose the Weighting Scale button to see the level of importance, if required.

8. Enter comments in the Comments field, as required.
9. Select the method for calculating the total score, by sum or average total.
10. Save your changes.
11. You can now select your competence types and competencies.

Selecting Your Competence Types and Competencies

1. Click the Competencies button to select the competence types and competencies to include in the assessment.

   Query all competence types and competencies for you to select from.

2. With the first competence type displayed in the Competence Type field, scroll through them until the first competence type you want to include appears, then click the Used box.
3. You can also indicate the sequence in which you want the competence type to appear on the assessment in the Sequence field. (If you do not sequence the competence types, they appear on the assessment Web page in the order they appear here).
4. Continue to scroll through the competence types, indicating the sequence in which you want the competence type to appear until you have selected all the ones you want to include.

   Suggestion: Select all the competence types you want to include first, before you select the competencies.

5. Check the Saved Competence Types Only box to retrieve in future only the competence types you are using.
6. Save your changes, and re–query the competence types you have selected. Only the competence types you have selected are now displayed.

7. With the first competence type and competencies for that type displayed, click the Used box for each competence you want to include in the assessment.
8. You can also indicate the sequence in which you want the competencies to appear on the assessment in the Sequence field. (If you do not sequence the competencies, they appear on the assessment Web page in the order they appear here).
9. Save your changes.
10. Continue to scroll through the competence types, selecting and saving competencies, and indicating the sequence, until you have selected them all.
11. Check the Saved Competencies Only box to display only the competencies you have selected in future

Deleting or Changing an Assessment Template

If a template is not yet in use, you can delete it, or you can make any changes to it that you require. For example, you might want to change the dates, or to include more competence types and competencies.

Oracle Human Resources prevents you from deleting templates that are in use, or from making changes to important information. This provides a safeguard against accidental deletion or change. However, you can enter an end date to terminate an assessment template, if needed, or you can change unimportant details. The Used by Assessment checkbox is automatically checked when a template is in use.

Use the Assessment Template window to perform this task.

▶ To delete or change an assessment template:

1. Query the assessment template in the Name field.

   If the Used by Assessment checkbox is unchecked, you can delete the template or change any fields. If it is checked, you can only change:

   - The name of the template and description
   - Any instructions
   - The end date to terminate an assessment template

2. Save your changes.

Creating or Changing an Appraisal Template

You can enter the following Lookups for appraisals:

- Define appraisal statuses as values for the Lookup Type APPRAISAL_ASSESSMENT_STATUS.
- Define appraisal types as values for the Lookup Type APPRAISAL_TYPE.

If you do not want to use appraisal statuses or types in the appraisal, do not enter values for these Lookups. Users can ignore these fields on the appraisal web page.

See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

Use the Appraisal Template window to create or change an appraisal template.

▶ To create an appraisal template:

1. Enter a name and description for the appraisal you are setting up. You can enter up to 85 characters for the name.
2. Enter the dates between which the appraisal template is valid. You must enter a From date but you can leave the To date blank.
3. Enter the instructions to be displayed to the appraiser(s) or reviewers(s). For example, ”Complete all parts”. These instructions are displayed when a user first creates an appraisal using SSHR.

   You can configure how instructions are displayed to the user by formatting the text with HTML tags.

   You can enter up to 2000 characters for each appraisal type.
4. Select the questionnaire you previously created.

   Note: You create questionnaires using an HTML Editor. See: Creating Questionnaires (SSHR), *Implementing Oracle Self–Service Human Resources (SSHR)*
5. Select a performance rating scale if you want to include performance ratings as part of the appraisal. Otherwise, leave this field blank. See: Creating a Rating Scale: page 3 – 45
6. Select an assessment template if you want to include assessments as part of the appraisal. Otherwise, leave this field blank. See: Creating an Assessment Template: page 3 – 57
7. Save your changes.

Defining Career Paths

You define career paths to show the possible progression to one job or position from any number of other jobs or positions.

You define career paths for positions using position hierarchies.

See: Position Hierarchies, *Using Oracle HRMS – The Fundamentals*

Job career paths are defined using the Career Path Names window and the Map Career Path window.

▶ To define a career path based on job progression:

1. Enter the names of the career paths you want to define in the Career Path Names window. Save the names.
2. Open the Map Career Path window. In the Name field, select the top job in the career path you are mapping.
3. Select the name of the career path in the Career Path Name field.
4. In the Job Progression From block, select all the jobs that are one level down from the top job in this career path.
5. To extend the career path from any one of these jobs, check the corresponding Down check box.

   The window is redisplayed with your selected job now showing in the Name field.

   You can move back up the career path by checking the Up check box.
6. Save your work.

Modeling Career and Succession Plans Based on Jobs

Follow the procedure described below to show the possible career progression to one job from any number of other jobs.

▶ **To model career and succession planning based on jobs:**

1. Create the career paths and map career paths.

   See: Defining Career Paths: page 3 – 62

   Once you have created your career paths, you can derive personal progression from the person's assignment to a job, and the job's place within career paths.

2. Optionally, enter work requirements against jobs and enter personal work choices for your employees.

   See: Entering Work Choices for a Job or Position, *Using Oracle HRMS – The Fundamentals*

   See: Entering Work Choices for a Person: page 3 – 65

3. Create your appraisal questionnaire and perform appraisals for employees. You create appraisals using Oracle Self–Service Human Resources' (SSHR) Line Manager responsibility.

   See: Setting up Appraisals and Questionnaires, *Implementing Oracle Self–Service Human Resources (SSHR)*

   Suggestion: If you are not creating an appraisal using SSHR , consider holding succession plan information against people as attachments or using a special information type.

   See: Special Information Types: page 1 – 30

Modeling Career and Succession Plans Based on Positions

Follow the procedure described below to create additional position hierarchies to show any type of progression within an enterprise.

▶ **To model career and succession planning based on positions:**

1. Optionally, create position hierarchies to show career paths.

   You would do this to show typical career progression.

   See: Creating a Position Hierarchy, *Using Oracle HRMS – The Fundamentals*

   Once you have created the hierarchies, you can derive personal progression from the person's assignment to a position, and the position's place within the hierarchies.

2. Optionally, enter work choices against positions and enter personal work choices for your employees.

   See: Entering Work Choices for a Person: page 3 – 65

   See: Entering Work Choices for a Job or Position, *Using Oracle HRMS – The Fundamentals*

3. If you use Oracle SSHR, use the Succession Planning option to record one or more next positions for each employee.

   See: Setting up Succession Planning, *Using Oracle Self–Service Human Resources (SSHR)*

   Note: This option does not require you to have set up career paths using position hierarchies.

   Suggestion: If you are not recording succession planning options using Oracle SSHR, consider holding succession plan information against people as attachments or using a special information type.

   See: Special Information Types: page 1 – 30

Entering Work Choices for a Person

In Oracle HRMS you can enter a person's work choices, such as their willingness to travel or relocate, their preferred working hours and work schedule, and the length of time they would like to stay in their next post. You can then compare these choices with the work requirements of jobs or positions when you are planning redeployment.

You enter personal deployment choices in the Work Choices window, accessed from the People window.

▶ **To enter work choices for a person:**

1. Check the relevant work capabilities boxes if the person is:
   - Willing to work in all locations
   - Willing to relocate
   - Willing to travel
   - Prepared to work in their current location only
   - Willing to visit internationally
2. Select the length of time the person wants to stay in a role, for example, indefinite or two years.
3. Select the person's preferred working hours (for example, 9.00 to 5.30), work schedule (the working days in the week or pattern of shifts), the proportion of full time hours available and any relocation preferences (for example, with family).
4. Check the relevant international deployment boxes if the person is willing to:
   - Work in all countries
   - Relocate
5. Select the countries in which the person prefers to work, and any countries in which they are not prepared to work.
6. Save your work.

Listing People by Special Information

To view a list of people who match a particular profile for one Special Information Type, use the List People By Special Information window.

> **Note:** The system administrator can create customized versions of the List People By Special Information window so that you use each version for one information type only. For example, one version could be called List People By Technical Skills.

▶ **To list people by special information:**

1. Select a Special Information Type.
2. Click in the Details field. A window opens prompting you for the details you have defined for this information type.
3. Enter values in the fields against which you want to match people, then choose OK. If you leave a field blank, it is not used in the matching process.
4. Choose the Find button.

   Employees and applicants who match your selection criteria are listed in the folder in the lower part of the window. You can enter a query here to further restrict the list of people. If you have access to the Folder menu you can remove, rearrange, or resize the fields displayed.

Running the Skills Matching Report

This report matches employees, applicants, or both against the requirements of one job or position (held in Special Information Types). You can select the closeness of the match you require.

You run reports in the Submit Requests window.

▶ **To run the Skills Matching Report:**

1. In the Name field, select Job and Position Skills Matching Report.
2. Enter the Parameters field to open the Parameters window.
3. Select the Job or Position to which you want to match people.
4. Select the person type, or types, you require.
5. Select the closeness of match you require from one of the following levels:
   - One or more essential skills
   - All essential skills
   - All essential and one or more desirable skills
6. Choose the Submit button.

Entering Performance Ratings

You carry forward details from the Employee Review window to the Performance window (which opens from the Salary Administration window). In this window, you can enter performance ratings for an employee at any time. You can also schedule the next performance review, and, optionally, associate a salary change with a performance review.

> **Note:** You cannot use a performance review entered through Oracle Self–Service Human Resources (SSHR).

In order to perform this task, performance rating values for the Lookup Type PERFORMANCE_RATING must have been defined.

▶ To enter a performance rating for an existing review:

1. Select an existing review by one or all of the following:
   - Date
   - Location
   - Type
2. Select a performance rating.
3. Enter the next performance review date, if required. (If you entered a time period for regular performance reviews in the Salary Information region of the Assignment window, the date of the next review appears automatically).

▶ To enter a new review and performance rating:

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

Entering an Employee Review

You can record details of a review event using the Employee Review window.

Before you can enter employee reviews, different types of employee interview must have been defined as values for the Lookup Type EMP_INTERVIEW_TYPE. These interview types could include disciplinary hearings and performance reviews,

▶ **To enter a review for an employee:**

1. Select an interview type, and enter a start date. The other fields are optional.
2. Save the review.
3. You can select reviewers by name or employee number. Save your work.

   If you want to enter a performance rating for the employee associated with this review, navigate to the Assignment or Salary Administration window.

   See: Entering Performance Ratings: page 3 – 68

Creating an Event

You use the Event Bookings window to create training events.

Suggestion: You could set up the Additional Event Details descriptive flexfield to record booking statuses (such as Wait Listed, Confirmed, and Attended). This descriptive flexfield displays on the Event Bookings window, the Employee Review window, and the Applicant Interview window.

Before you can create events, event types, such as departmental meeting or marketing presentation, must be defined as values for the Lookup Types EMP_EVENT_TYPE and APL_EVENT_TYPE.

▶ To create an event:

1. Select the type of event then enter the date, time, supplying organization, location, and contact name.
2. Save the event.
3. You can select attendees by name or number in the Bookings block of this window.

CHAPTER

4 Budgeting

Budgeting

Oracle HRMS enables you to manage all your human resource budgets. These do not have to be monetary, you can also set up budgets for headcount or full time equivalent.

Can you manage budgets for all different areas of your enterprise?

Oracle HRMS enables you to define budgets against organizations, jobs, grades, positions, or any combination of these.

Can you manage salary budgets using HRMS?

Yes. Oracle HRMS enables you to add salary estimates to your non–monetary budget. Oracle HRMS provides you with all the key information you require to define your salary budgets.

Budgeting Overview

Oracle HRMS enables you to manage all your human resource budgets. To help you to do this there are two key concepts:

- Human Resource Budgets
- Salary Budgets

Human Resource Budgets

In Oracle Human Resources, you can define non–monetary budgets, such as headcount or full–time equivalents, that are based on your work structures. You can define budgets against an organization, job, grade, position, or any combination of these.

Monitoring Actual Values

You can monitor the budgets by comparing the budget values with actual values derived from employee assignments. For example, you might define a headcount budget of two for the position Marketing Manager. The variance of the actual value from the budget value depends on the number of employees assigned to that position at any time. A *negative* variance indicates a vacancy.

In the calculation of actual values, an employee and their work assignment does not always count as one. For example, if an assignment is part–time, it should count as less than one for a Full Time Equivalent type of budget.

Default Assignment Budget Values

At the Business Group level, you can enter the default value of an assignment for each budget type. For example, if most of your employee assignments are full time, you would enter 1 as the default value for a FTE budget. You can override the default for particular employee assignments (such as part–time assignments) in the Assignment Budget Values window.

You can update an assignment budget value at any point in the budget period. Oracle HRMS now keeps a continuous record of any changes using DateTrack. Using the Date Track History facility, you can view all the changes made to the budget values.

HRMS Intelligence and Budget Values

Many of the HRMS Intelligence reports, Discoverer workbooks and Performance Measures display information about manpower within your enterprise. This is calculated using the budget values you set up.

If you are only using the budget values for reporting on manpower in HRMS Intelligence you can choose not to set up any budget values, HRMS Intelligence then uses Oracle FastFormula to calculate the manpower.

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

Salary Budgeting

Using Oracle Human Resources, you can set up human resource budgets for headcounts and full time equivalents at various levels of the organization.

Most enterprises need to add salary estimates to these headcount budgets to provide salary budgets. Oracle Human Resources provides you with the key information you require to define your salary budgets:

- Headcount or FTE budget for a defined period of time
- Valid grades for jobs and positions
- Grade rates or pay scale rates to show salary values

  Note: The calculation of actual salary values happens during the payroll run. To help you compare planned versus actual spending, Oracle Payroll provides the following information:

  – Actual pay values for each assignment in the payroll run

  – Balances to show to date totals

  – Costs accumulated to the cost centers and project codes you set up in the Cost Allocation Flexfield

The detailed process of salary budgeting varies from one enterprise to another according to the enterprise size, type, and culture. To help you understand how to manage your budgeting, we discuss three types of enterprise and suggest different ways in which you could use the information held in Oracle Human Resources to derive your salary budgets.

Budgeting Approach in a Government Agency

A typical government agency has a rule–based structure based on organizations, positions, and grading structures. In this type of enterprise, salary budgets are usually set for each position, then rolled up to the organization level.

Starting from the position definition, you can extract the list of valid grades and the grade rate values for each of these grades. If you use grade scales, you can use the midpoint value from the range defined for each grade.

To calculate the salary budget for each position, you multiply the position headcount by one of the values for the grade. Typically you would use the value for the middle grade. However, you might choose the lowest grade if you are making entry–level assignments to new positions.

When you have established the relationship between these various items in the database, you can automate the budgeting through the creation of a standard reporting view, using SQL*Plus.

Budgeting Approach in a Centralized Management Company

The company with a centralized management structure has a more flexible approach to roles, frequently using jobs rather than positions. There is more emphasis on recruiting the 'right people' and on individual responsibility and initiative. Reward systems are usually performance related.

Salary budgets are typically set for each organization, based on a headcount budget for jobs and organizations. The budget for each organization is calculated from the midpoint grade rate value for the valid grades for each job multiplied by the planned headcount for each organization and job combination.

Budgeting Approach in a Devolved Management Company

In this type of enterprise, local managers are expected to decide on the composition of their own workforce in response to market requirements, and to set their staff's compensation levels, within an overall budget. Control is exercised through the allocation of a budget, but administration of the budget is left to the discretion of the local manager.

Current expenditure in each organization is used as the starting point for budgeting. This cost is projected on the basis of plans for expansion or reduction, with some inflationary factor added.

One approach to budgeting in this environment is to download current salary values from HRMS to a spreadsheet using Oracle Application Data Exchange (ADE). The spreadsheet facilities are well suited to the application of various percentages to try out salary and headcount change proposals.

For further details about spreadsheets, see Using Oracle HRMS with Spreadsheets, *Customizing, Reporting and System Administration in Oracle HRMS*

Setting Up Budgets

Use the Budgeting windows to set up and maintain your non–monetary budgets, such as headcount or full time equivalent.

▶ **To set up budgets:**

1. Add lookup types and values.

   You can set up values for BUDGET_MEASUREMENT_TYPE in the Lookups window.

   See: Adding Lookup Types and Values, *Customizing, Reporting and System Administration in Oracle HRMS*

2. Rename period types, if necessary.

   See: Rename Period Types: page 4 – 8,

3. Define calendars to determine the start date and period type of your budgets.

   See: Define Budgetary Calendars: page 4 – 9

4. Define your human resource budgets in the Budget window.

   See: Defining Human Resources Budgets: page 4 – 10

5. Set a default budget value for all assignments in the Business Group, if required.

   See: Enter Budget Value Defaults for the Business Group, *Using Oracle HRMS – The Fundamentals*

6. Enter assignment budget values.

   Override the default values for an assignment, or enter new values if defaults have not been set, as required.

   See: Entering Assignment Budget Values: page 4 – 7

Entering Assignment Budget Values

At the Business Groups level, you can enter the default value of an assignment for each type of budget you have defined. For particular assignments, you override this default value in the Assignment Budget Values window.

If you have not entered a default value at the Business Group level, you must be careful to enter a value for every assignment. If there is no value entered in the Assignment Budget Values window, that assignment is not counted when calculating actual values for the budget.

> **Note:** If you are using Oracle HRMS Intelligence, assignments without budget values can be included when calculating actual values for the budget.
>
> See: Oracle HRMS Intelligence, *BIS 11i User Guide Online Help*

▶ To enter an assignment budget value:

1. If necessary, use the DateTrack facility to set the effective date for the assignment budget values. You must re–query the assignment budget values into the window if you change the effective date.
2. Select a budget type in the Units field and enter the value of the assignment for this budget in the Value field. Oracle HRMS displays the effective dates of the assignment budget value in the Effective Dates From and To fields.

Renaming Period Types

Budgetary calendars and payroll calendars are based on a period, such as a Quarter or a Year. Standard period types are predefined with the system. If you want to use a different name for a period type, enter the name in the Period Types window.

You cannot remove the names that are already defined, but you can insert a new record and select the appropriate Number Per Year.

▶ **To rename a period type:**

1. Insert a new record.
2. Enter the new name for the period type.
3. Enter the number of time periods to occur per year.
4. Save your new period type.

Defining Budgetary Calendars

You can define calendars for human resource budgets in the Budgetary Calendar window.

Once you define the calendar you cannot:

- Change the start date. Set the start date to let you enter any budget history information you want to enter.
- Define years with an earlier start date than the start of the calendar.

In each calendar you define as many years as you require. You do not create a new calendar for each year. You just add new periods to the calendar.

▶ **To define a budgetary calendar:**

1. Enter the name, and start date for your calendar.

   Check that the start date year is early enough to cope with your historic data. Once you define the calendar, you cannot change the start date.

2. Select a period type. If you select Semi–monthly, enter a value between 1 and 28 in the Midpoint Offset field to determine the start date of the second time period each month. For example, if you enter the value 15, the second time period each month begins on the 16th.

3. Save the calendar.

   The system automatically creates the time period details. You can alter the default names for each time period.

4. If you want to add years to, or delete years from, the end of the calendar, choose the Change Calendar button.

5. When you have defined your calendars, you are ready to define your budgets.

Defining Human Resource Budgets

You define human resource budgets in the Budget window.

During the time period of the budget, it may be necessary to adjust the budget values as a result of organizational or financial change. You can create multiple versions of a single budget for comparison purposes.

You can do the following:

- Define a budget for any combination of organization, job, position or grade.

  Note: If you are using HRMS Intelligence to investigate budgets within your enterprise you should not set up 'rollup' budgets as these can distort your results.

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

- Enter a budget value for every time period in your calendar.

  Actual values for each budget type for an assignment are entered in the Assignment Budget Values window.

Suggestion: Consider setting default assignment budget values for the Business Group. If you want accurate values you must make sure that assignments have budget values entered.

▶ To define a budget:

1. Enter the name of the budget, and select a measurement type and calendar. Save the budget.
2. Enter a version number and start date for this budget version. Save the new version.
3. Select the components for which you want to produce budget element information, and save your work.

   You can enter any combination of organization, job, position, and grade. You must select a value for at least one of the fields.

   Note: If you are using the HRMS Intelligence reports to investigate budgets you should enter an organization element. Only budgets which have an organization set up against them are included in the reports.
4. In the Budget Values block, select a specific time period from your calendar. Enter a numeric budget value for your selected budget element for that period.

   The system automatically gets the actual values and calculates the Variance as an absolute value and a percentage value.

5. Select other time periods for this budget element, as you require, and enter your budget values. Save your values.
6. Repeat steps 3 and 4 as necessary for other budget elements. Save your work.

Viewing and Reporting Budget Variances

You can view the variance for any budgets in the Budget window. If you are using positions, you can view the variance between your budget and the actual values for positions using two other windows:

- List Position Budget Variance
- List Budget Variance by Organization.

You can report on variances using the Staffing Budget Details report.

Listing Position Budget Variance

▶ **To view position variances within a hierarchy:**

1. In the List Position Budget Variance window, select a position hierarchy and a position from the hierarchy.

   The inquiry will return the budget variance for this position and its subordinates in the hierarchy.

2. Select a budget and the budget period for which you want to view variances. Choose the Find button.

   The folder displays the actual number of holders at the start and end of the period, the number of new starters and leavers during the period, and the variance between the budget value and the actual value at the period end.

For more information about how to use folders, see Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide.*

Listing Budget Variance by Organization

▶ **To view position variances within an organization:**

1. In the List Budget Variance by Organization window, do one of the following:
   - Select an organization hierarchy and an organization from the hierarchy. The inquiry returns the budget variance for all positions within this organization and its subordinates in the hierarchy.
   - Select an organization. The inquiry returns the budget variance for all positions within this organization.
2. Select a budget and the budget period for which you want to view variances. Choose the Find button.

   The folder displays the actual number of holders at the start and end of the period, the number of new starters and leavers during the period, and the variance between the budget value and the actual value at the period end.

For more information about how to use folders, see Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide.*

Running the Staffing Budget Details Report

You can use the standard Staffing Budget Details report to compare your actual staffing levels with budgeted levels for a specified range of periods.

You run reports in the Submit Requests window.

▶ **To run the Staffing Budget Details report:**

1. In the Name field, select Staffing Budget Details report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Select the budget and version.
5. Select the start and end periods to include in the report.
6. Choose the Submit button.

Running the Salary Review Report

Use this report to see current and past salaries, and salary proposals, for some or all of your employees. You can restrict the employees to those assigned to a selected organization, job, position, or grade. You can also restrict the report to showing only employees receiving the maximum salary for their grade (defined by the grade rate). You can use the report to show all salaries (approved and proposed) or to show unapproved salary proposals only.

You run reports from the Submit Requests window.

▶ **To run the Salary Review Report:**

1. In the Name field, select Salary Review Report.
2. Enter the Parameters field to open the Parameters window.
3. Enter the effective date for which you want to see the report.
4. Optionally select an organization, job, position, and/or grade to restrict the scope of the report to employees assigned to these components.
5. If you want to restrict the report to showing salary proposals, select Yes in the Unapproved Proposals Only field.
6. If you want to restrict the report to showing employees receiving the maximum salary for their grade (defined by the grade rate), or a higher salary, select Yes in the Grade Rate Maximum Only field.
7. 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.

Actvity 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.

Comminication 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. Chose 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 Infomation 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 then 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 Ministere du Revenu du Quebec, 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 Ministere du Revenu du Quebec.

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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