Implementing Oracle® Self–Service Human Resources 4.0

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Implementing Oracle Self–Service Human Resources 4.0, Release 11*i*

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Contents

Preface **Preface ..... ix**
Audience for This Guide x
How To Use This Guide x
Do Not Use Database Tools to Modify Oracle Applications Data xix
About Oracle xx
Your Feedback xx

Chapter 1 **Overview of Self–Service Human Resources ..... 1 – 1**
Overview ..... 1 – 2
Key Concepts in Self–Service Human Resources (SSHR) ..... 1 – 5
Definitions ..... 1 – 5
Self–Service Modules ..... 1 – 7
SSHR Licences ..... 1 – 18
Predefined Self–Service Responsibilities and User Menus ..... 1 – 19

Chapter 2 **Getting Started with SSHR ..... 2 – 1**
Overview ..... 2 – 2
Minimum Requirements for an SSHR System ..... 2 – 3

Chapter 3 **Understanding How SSHR Functions Work ..... 3 – 1**
Understanding a Typical SSHR Function ..... 3 – 2
How an SSHR Function Works in SSHR 4.0 ..... 3 – 3

A Typical SSHR Web Page . . . . . 3 – 7
Managing Dates in SSHR . . . . . 3 – 8
Effective Dates . . . . . 3 – 8
Future–Dated Changes . . . . . 3 – 8
Save For Later . . . . . 3 – 10

Chapter 4 **Configuring SSHR . . . . . 4 – 1**
Configuration Overview . . . . . 4 – 2
Guidelines for Configuring SSHR Functions . . . . . 4 – 2

Chapter 5 **Managing User Access . . . . . 5 – 1**
User Access and Security . . . . . 5 – 2
Self–Service Menus and User Access . . . . . 5 – 9
Defining Menus for SSHR . . . . . 5 – 12
Defining User Access to Self–Service Functions . . . . . 5 – 13
Defining Functions for SSHR . . . . . 5 – 15
Batch Creation of User Accounts . . . . . 5 – 18
Creating Batch User Accounts with Concurrent Programs . 5 – 20
Writing User Hooks for the Batch Creation of User Accounts . . . . . 5 – 25

Chapter 6 **Configuring Process Flows . . . . . 6 – 1**
Self–Service Workflows . . . . . 6 – 2
Workflow Objects and Item Types . . . . . 6 – 3
Configuring Workflow Objects . . . . . 6 – 5
Configuring Workflow Attribute Values . . . . . 6 – 7
Configuring Workflow Error Processes . . . . . 6 – 8
Defining Your Enterprise's Email Addresses . . . . . 6 – 9

Chapter 7 **Configuring Page Layouts . . . . . 7 – 1**
The Configuration Framework . . . . . 7 – 2
Configuration Framework Hierarchy . . . . . 7 – 2
Configuring Web Pages . . . . . 7 – 4
Configuring Flexfields . . . . . 7 – 5
Configuring Tabbed Regions . . . . . 7 – 6
Adding Instructions to Web Pages . . . . . 7 – 9
Configuring the Global Button Bar . . . . . 7 – 11
Replacing the Default Oracle Logo . . . . . 7 – 12

Chapter 8 **Approvals ..... 8 – 1**
Overview of Approvals ..... 8 – 2
Configuring Approvals in the Workflow Builder ..... 8 – 7
Customizing Approvals Using PL/SQL ..... 8 – 8

Chapter 9 **Common SSHR Functions ..... 9 – 1**
Overview of Common SSHR Modules ..... 9 – 2
Person Tree ..... 9 – 3
Actions Page ..... 9 – 8
Release Employee Information ..... 9 – 11
Review and Confirm ..... 9 – 14
New User Registration ..... 9 – 19
Setting Up a Generic User ID For New User Registration .. 9 – 21
Configuring the New Employee and Non–Employee Registration Processes ..... 9 – 27
Configuring the Create User Name Process ..... 9 – 32
Generating Self–Service User Names and Passwords ..... 9 – 35
New Employee Registration and Non–employee Registration ..... 9 – 36
Create User Name ..... 9 – 41

Chapter 10 **Employee Demographics ..... 10 – 1**
Personal Information Modules ..... 10 – 2
Basic Details ..... 10 – 6
Main Address ..... 10 – 9
Secondary Address ..... 10 – 11
Phone Numbers ..... 10 – 14
Dependents and Beneficiaries ..... 10 – 16
Emergency Contacts ..... 10 – 18
Professional Details Modules ..... 10 – 21
Education and Qualifications ..... 10 – 22
Other Professional Awards ..... 10 – 25
Competence Profile ..... 10 – 28
Work Preferences ..... 10 – 32
Resume ..... 10 – 34
Tenure Tracking (US) ..... 10 – 36
Academic Rank (US) ..... 10 – 38

Chapter 11 **Manage Employee Events Functions ..... 11 – 1**
MEE Functions and Workflow ..... 11 – 2

Assignment ..... 11 – 4
Termination ..... 11 – 8
Work Schedule ..... 11 – 11
Change Location ..... 11 – 13
Special Information Types (SITs) ..... 11 – 16
Other Employment Information ..... 11 – 19
Pay Rate ..... 11 – 21
Change Manager ..... 11 – 23

Chapter 12 **HR Views ..... 12 – 1**
Overview ..... 12 – 2
Personal Information View ..... 12 – 3
Assignment Details View ..... 12 – 5
Compensation Activity View ..... 12 – 8
Termination History View ..... 12 – 11
Search Functions for HR Views ..... 12 – 14

Chapter 13 **Benefits and Individual Compensation Distributions ..... 13 – 1**
Self–Service Benefits Enrollments ..... 13 – 2
Setting Up Self–Service Benefits Enrollments ..... 13 – 8
Setting Up Self–Service Benefits Web Pages ..... 13 – 10
Setting Up User Access to Self–Service Benefits ..... 13 – 13
Benefits Enrollments ..... 13 – 15
Setting the Effective Date of a Scheduled Enrollment in Self–Service Benefits ..... 13 – 27
Removing the Benefits Enrollment Overview Web Page (Standard Benefits) ..... 13 – 29
Maintaining Primary Care Providers for a Plan ..... 13 – 30
Configuring the Primary Care Provider Search Facility .... 13 – 33
Defining Communication Types ..... 13 – 36
Defining When to Use a Benefits Communication ..... 13 – 38
Defining Additional Enrollment Action Types (Advanced Benefits) ..... 13 – 39
Self–Service Individual Compensation Distributions (ICD) . 13 – 40
Individual Compensation Distributions (ICD) ..... 13 – 50

Chapter 14 **Self–Service Payroll ..... 14 – 1**
Overview of Payroll Functions ..... 14 – 2
Payment Methods ..... 14 – 3

Online Payslip ..... 14 – 10
Online Tax Form ..... 14 – 13

Appendix A **Implementation Steps ..... A – 1**
Implementation Steps for Self–Service HR (SSHR) ..... A – 2
User Hooks To Generate User Names For New User Registration ..... A – 9

Glossary

Index

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Preface

Audience for This Guide

This Implementation Guide has been written to help implementation teams set up and configure Oracle Self–Service Human Resources (SSHR.).

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

- The principles and customary practices of your business area.
- Oracle Human Resources Management Systems
- Oracle Workflow
- Oracle Self–Service Web Applications
- Oracle HRMS System Administration
- Oracle HRMS Applications

If you have not yet been introduced to these applications, we suggest you attend one of the training classes available through Oracle University.

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 SSHR.

- Chapter 1 introduces SSHR and its features
- Chapter 2 outlines the minimum steps you need to carry out to be able to run SSHR in a test environment.
- Chapter 3 illustrates how a typical SSHR function works using the Personal Information functions as an example.

The next five chapters explain the tools and general techniques you use to configure SSHR.

- Chapter 4 introduces the configuration tools used to configure SSHR and provides a generic configuration procedure.
- Chapter 5 looks at user access and security.
- Chapter 6 looks at configuring process flows using the Workflow Builder.

- Chapter 7 looks at configuring page layouts using the OA Configuration Framework.
- Chapter 8 looks at configuring approvals using the Workflow Builder and PL/SQL.

The remaining chapters conver in detail the specific configuration options available in each functional area.

- Chapter 9 covers common SSHR functions.
- Chapter 10 covers Employee Demographics functions.
- Chapter 11 covers Manage Employee Events (MEE) functions
- Chapter 12 covers the Views functions
- Chapter 13 covers Benefits and Individual Compensation Distributions (ICD)
- Chapter 14 covers the Payroll functions

- Appendix A is a checklist of the implementation and configuration steps for SSHR.
- Appendix B gives a sample of the user hook code for the New User Registration function.

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

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF).

- **Online Help** – The new features section in the HTML help describes new features in 11i. This information is updated for each new release of Oracle HRMS. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini–pack as an upgrade, this document describes the new features. Online help patches are available on Metalink.
- **11i Features Matrix** – This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on Metalink.
- **Readme File**– Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User's Guides

Oracle Human Resources Management Systems shares business and setup information with other Oracle Applications products. Therefore,

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You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle HRMS (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting started with Oracle Applications" from any Oracle Applications help file.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

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 for Forms–Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms–Based Products

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.

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.

Guides Related to This Product

Using Oracle HRMS – The Fundamentals

Use this guide to learn about representing your enterprise on your application. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining a payroll, and also how to manage your costs.

Managing Your Workforce Using Oracle HRMS

Use this guide to learn about all aspects of managing your workforce. This includes how to represent your workforce on your application, recruiting new employees and developing their careers, and also defining and managing budgets.

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 Total Compensation Using Oracle HRMS

Use this guide to learn about setting up the application to store and process information on your total compensation package, including salary administration, other earnings, deductions, benefits, absence management and PTO accrual plans.

Configuring, Reporting and System Administration in Oracle HRMS

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

Implementing Oracle HRMS

This guide explains the setup procedures you need to carry out 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 information and career management functionality.

Oracle Self–service Web Applications

This guide provides information on self–service applications in general.

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 Application Data Exchange

This guide provides information about using Application Data Exchange to view HRMS data with desktop tools, and upload revised data to your application.

Oracle Business Intelligence System Implementation Guide

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

BIS User Guide 11*i*

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.

Installation and System Administration

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 Applications–wide features such as Business Intelligence (BIS), languages and character sets, and Self–Service Web 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 Rapid Install, which minimizes the time to install Oracle Applications and the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's 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 and lists database and product–specific upgrade tasks. You must be either at 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.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how–to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the applications file system and database.

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

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Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference 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 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle HRMS. This manual details additional steps and setup considerations for implementing Oracle HRMS with this feature.

Multiple Organizations in Oracle Applications

If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Oracle HRMS installation, this guide describes all you need to know about setting up and using Oracle HRMS with this feature.

Oracle Applications Flexfields Guide

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

Oracle Technical Reference Manuals

The technical reference guides are now available in electronic format only. You can now access technical reference manuals for any Oracle Applications product you have licensed.

Oracle Manufacturing and Distribution Open Interfaces Manual

This manual contains up–to–date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD–ROM for Release 11i.

Using Oracle FastFormula

This guide provides information about writing, editing, and using formulas to configure 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 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.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle HRMS and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network, Oracle University's online education utility. In addition, Oracle Training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure,

terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on–site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Human Resources Management Systems 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 Oracle8*i* server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

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, you may 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 to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. 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.

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CHAPTER

1 Overview of Self–Service Human Resources

Overview

Oracle Self–Service Human Resources (SSHR) extends the functionality of standard Oracle HRMS by enabling both employees and managers to participate in Human Resources management via a web browser. SSHR 4.0 offers secure self–service business transactions and easy–to–use functionality driven by Oracle's proven web and workflow technologies. These technologies enable the data, views, stored procedures, validation routines, and APIs used in the standard Oracle Applications to be shared, thus providing seamless integration between Oracle HRMS and Self–Service HRMS.

What is SSHR 4.0?

The following sections answer common questions on SSHR and give an overview of the functionality.

What does self–service mean?

Self–service means that the originator of a task is also the person responsible for that task. Using a standard web browser, the user accesses HR data and performs a specific task, for example, registering a change of address. By transferring the responsibility for the task to the originator of the task, data accuracy is increased and administration costs are reduced.

How do self–service applications differ from traditional HR systems?

The key elements that distinguish self–service applications from other systems are:

- easy–to–use user interfaces
- easy access to functions via web browsers
- complex processes reduced to simple steps
- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrollment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure SSHR web pages to suit user requirements.

What are the advantages to the HR Department?

Potential self–service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to

more complex tasks, such as informing employees of their current vacation allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

Another key advantage to the HR department is the accuracy of employee–maintained information. Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay check is mailed to the correct address. Accurate and timely data is also vital for HR reports. For example, you could use data on the skills of your employees to create a report showing how these skills could be better deployed throughout the enterprise.

Non–HR managers often have direct contact with employees and customers and can make informed, expert, and quick decisions. Using SSHR, a manager can now make HR decisions even quicker. This can help reduce the number of rejected offers caused by delays in the recruitment process, and minimize the number of unfilled, non–productive vacancies. Managers can also search for people with the right skills if they have an unfilled vacancy, or find new work for an employee.

SSHR enables HR managers to publish information on job opportunities, company policies, and legislation advice to all employees. A new dialog can be created between management and employees which results in increased employee applications for jobs or training and increased accuracy of personal information stored on employees. HR management can now be so easily accessible that a virtual HR manager is always at hand.

How can the HR Department control the self–service activities available to each user?

The security controls – responsibilities, menus, and security profiles – used in standard Oracle applications also apply to self–service users. The seeded SSHR menus (Employee Self–Service and Manager Self–Service V4.0) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self–service user's record; the manager functions allow the user to select an employee from a list of available employees and carry out the required function.

The seeded SSHR responsibilities corresponding to each of these menus are useful for exploring the functionality delivered with the product, although they are not intended for production use. Instead, customers can configure their own variations of these menus and responsibilities, combined with appropriate security profiles, to restrict different groups of users to specific functions and employee groups.

The Configuration Framework and Workflow Builder tools offer considerable flexibility in controlling the user's access to specific functions and require that users' transactions are approved before they are committed to the database. You can also control the user's access by configuring the base products. For example, Benefits eligibility profiles and enrollment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

How can SSHR meet my enterprise's unique business processes?

SSHR is highly configurable: you can configure web pages and predefined business transactions. You can also create your own business processes. Although SSHR uses the design standards that are common to all Oracle applications, you can change the appearance of the web pages by adding your own logos and by changing field and radio button names. On some pages, you can choose which sections are displayed. If you want to highlight procedures that are specific to your enterprise, you can customize the instructions that provide online help for users.

Key Concepts in Self–Service Human Resources (SSHR)

This section defines some important terms used throughout this Implementation Guide.

Definitions

AOL function

An AOL function is an item that can be added to a menu. The item can call a screen or web page or be a hidden function.

See also: Self–Service Function

AK Dictionary

Alternative name for Web Applications Dictionary.

Business Process

Produces the products and services that are recognized outside the business area. They support the organization's objectives, critical success factors, or business objectives. They can be subdivided into sub–processes, for example, the Change Hours workflow process consists of the Work Schedule and Pay Rate subprocesses.

Configuration Framework

The Configuration Framework allows you to configure the display of Oracle Self–Service Web Applications (OSSWA) without having to make any changes to the underlying code. Your configurations are stored in the Web Applications Dictionary and are preserved during upgrades.

See: The Configuration Framework: page 7 – 2

Oracle Applications (OA) Framework

The OA Framework is the technical foundation for the Oracle Self–Service Applications (OSSWA).

Region

A region in the Web Applications Dictionary defines a page, or part of a page, in Oracle Self–Service Web Applications. The region is defined in terms of region items such as fields and buttons.

Self–Service Function

Self–service functions appear as menu options to the SSHR user. The function determines how the self–service modules are called. For

example, the same self–service module is used for Personal Information from both the manager and employee menus but the function determines whether the module is called in Employee or Manager mode.

Self–Service Module

A set of dynamic web pages and related components (for example, workflow process and Web Applications Dictionary definitions, stored procedures). Examples include Personal Information, Competencies, and Assignment.

Transaction

A transaction is a logical unit of work such as a promotion or an assignment change. It may consist of several components, such as changes to salary, locations, and grade, but all the components of a transaction must be handled as a unit to be either approved or rejected.

Web Applications Dictionary

An active data dictionary that stores information on the appearance and behavior of self–service pages. Customers can configure changes to the Web Applications Dictionary using the Configuration Framework.

See: The Configuration Framework: page 7 – 2

Workflow Builder

Oracle Workflow is embedded within SSHR and manages the flow of information between the HR professional, the manager, the employee, and the applicant. You use workflow to control who and how these participants take part in HR processes by modifying the underlying process definitions.

See: Self–Service Workflows: page 6 – 2

Workflow Function

A workflow activity which is defined as a function and which maps to a PL/SQL procedure that is executed by the Workflow Engine when it encounters this activity in the workflow process.

See: Self–Service Workflows: page 6 – 2

Workflow Process

A workflow process is a series of activities linked by transitions. Each activity can be a function, a notification, or a subprocess.

Self–Service Modules

This section provides a brief description of the seeded SSHR modules.

Summary of SSHR Modules

Common Modules

Module Name	Manager/Employee	Workflow chainable/Approvals	Localization
Enter Person Process	Manager	No / No	Global
Manager Actions	Manager	No / No	Global
New User Registration	Both	Yes / Yes	Global
Review and Confirm	N / A	Yes / Yes	Global
Release Employee Information	Both	No / Yes	Global
Personal Actions	Employee	No / No	Global
Save for Later	Both	No / No	Global

Benefits

Module Name	Manager/Employee	Workflow chainable/Approvals	Localization
Benefits Enrollment	Both	No / No	Global
Individual Compensation Distributions	Both	Yes / Yes	Global

Career and Performance Management

Module Name	Manager/Employee	Workflow chainable/Approvals	Localization
Appraisals (3.4)	Both	No / Yes	Global
Apply for a Job (3.4)	Both	No / Yes	Global

Module Name	Manager/Employee	Workflow chainable/Approvals	Localization
Suitability Matching (3.4)	Manager	No / No	Global
Succession Planning (3.4)	Manager	No / No	Global

Manage Employee Events

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Assignment	Manager	Yes / Yes	Global
Change Location	Manager	Yes / Yes	Global
Change Manager	Manager	Yes / Yes	Global
Individual Compensation Distributions	Both	Yes / Yes	Global
Other Employment Information	Manager	Yes / Yes	Global
Pay Rate	Manager	Yes / Yes	Global
Special Information Types (SITs)	Both	Yes / Yes	Global
Termination	Manager	Yes / Yes	Global
Work Schedule	Manager	Yes / Yes	Global

Payroll

Module Name	Manager/Employee	Workflow chainable./Approval	Localization
Online Payslip	Both	No / No	US, UK, Canada
Personal Payment Methods (Direct Deposit)	Both	No / Yes	Global
Online Tax Forms	Both	No / No	US

Personal Information

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Basic Details	Both	Yes / Yes	Global
Main Address	Both	Yes / Yes	Global
Other Address	Both	Yes / Yes	Global
Phone Numbers	Both	Yes / No	Global
Emergency Contacts	Both	Yes / No	Global
Dependents and Beneficiaries	Both	Yes / No	Global

Professional Details

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Academic Rank	Both	No / Yes	US
Competence Profiles	Both	No / Yes	Global
Education and Qualifications	Both	No / Yes	Global
Resume	Both	No / No	Global
Other Professional Awards	Both	No / Yes	Global
Tenure Tracking	Both	No / Yes	US
Work Preferences	Both	No / No	Global

Recruitment

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Candidate Offers (3.4)	Manager	No / Yes	Global

Training

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Enroll in a Class (3.4)	Both	No / Yes	Global
Cancel Enrollment (3.4)	Both	No / Yes	Global

Views

Module Name	Manager/Employee	Workflow chainable/Approval	Localization
Employee / Manager Views (3.4)	Both	No / No	Global
HR Views	HR Professional	No / No	Global

Common Modules

The following generic modules provide common, low–level functionality that is reused in many of the higher–level functions.

Enter Person Process

The Enter Person process enables the user to:

- Select an employee from a searchable list of people
- Select an employee from their supervisor hierarchy
- Add and remove employees from their personal list of employees

A Simple Search enables to search for an employee by name. With an Advanced Search, a manager can search for a person or persons who meet particular criteria. You can search on personal, assignment or skills criteria.

See: User Access to People: page 5 – 2

Manager Actions

The Manager Actions module enables the user to first select a person and then the function, or action, to be performed. When the user selects the person, a context–sensitive list of available actions is displayed and the user can choose the required action from the list.

See: Navigation Paths: page 5 – 5

See: Actions Page: page 9 – 8

New User Registration

New User Registration enables users to register their own details for SSHR and for benefits providers. You set up a generic name and password and you can either enable users to create their own user name or you can use user hooks to create the user name automatically.

See: New User Registration: page 9 – 19

Personal Actions

The Personal Actions module is the employee equivalent of Manager Actions. The employee is presented with a list of actions that they can perform on themselves.

See: Navigation Paths: page 5 – 5

See: Actions Page: page 9 – 8

Release Employee Information

The Release Employee Information module enables an SSHR user to share information about themselves with another employee, often a manager, who would not normally have access to these records. For example, an employee may have requested a transfer to another group and the manager of the group may want to review the employee's employment information before making a decision. An employee can revoke access to their information at any time – unless the application has been configured differently.

See: Release Employee Information: page 9 – 11

Review and Confirm

The Review and Confirm module shows details of transactions that a user has updated or details about pending transactions that require approval. The user can review the information displayed to ensure that all the details are correct before the changes are finally submitted to the database. If necessary, the user can return to the previous screen to change incorrect information.

See: Review and Confirm: page 9 – 14

Save for Later

The Save for Later module enables a user to interrupt a transaction before the data is submitted. The transaction is stored in the Actions Saved for Later table on the Actions page. The functionality also applies in the case of a timeout or system failure.

See: Save for Later: page 3 – 10

Benefits Modules

Benefit Enrollment

Benefit Enrollments enables an employee to:

- Review their current benefit enrollments
- Select benefits
- Add, update, or remove dependents
- Add, update, or remove beneficiaries
- Search for and select primary care providers

See: Self–Service Benefits Enrollments: page 13 – 2

Individual Compensation Distributions (ICD)

ICD enables managers to assign one–time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can combine ICD with the benefits modules if required.

See: Individual Compensation Distributions: page 13 – 40

Career and Performance Management Modules (SSHR 3.4)

For information on configuring the Career and Performance Management functions for SSHR release 3.4, see: *Implementing Oracle Self–Service Human Resources 3.4* (available on Metalink).

Appraisals

The Appraisals module enables a manager and employee to evaluate employee performance and competencies and to set objectives and actions.

Apply for a Job

The Apply for a Job module enables employees to search for and apply for jobs, view job details, manage their resume, and prepare applications.

Suitability Matching

The Suitability Matching module compares and matches a person's competences against a job or position.

Succession Planning

The Succession Planning module enables a manager to prepare an employee for a position and to plan a successor for the position.

Employee Demographics Modules

Personal Information

The Personal Information module enables users to update and maintain their personal records. The Personal Information module covers the following areas:

- Basic employee details

  See: Basic Details: page 10 – 6

- Address

  See: Main Address: page 10 – 9

- Other addresses

  See: Other Address: page 10 – 11

- Phone numbers

  See: Phone Numbers: page 10 – 14

- Employee dependents and beneficiaries

  See: Dependents and Beneficiaries: page 10 – 16

- Emergency contacts

  See: Emergency Contacts: page 10 – 18

The Personal Information module can also be chained with Special Information Types (SITs).

See: Personal Information: page 10 – 2

Professional Details

The Professional Details module enables users to maintain professional details. The Professional Detail functions are used by both employees and their managers. Certain functions can be restricted for manager access only.

The Professional Details menu contains the following functions:

Education, qualifications

The Educations and Qualifications module enables employees and managers to store details on their academic qualifications.

See: Education and Qualifications: page 10 – 22

Other professional awards

The Other Professional Awards module enables employees and managers to store details on professional qualifications.

See: Other Awards: page 10 – 25

Competence profiles

The Competence Profile module enables employees and managers to store information on skills and competences.

See: Competence Profiles: page 10 – 28

Work preferences

The Work Preferences module enables employees and managers to store information such as relocation preferences and travel preferences.

See: Work Preferences: page 10 – 32

Resume

The Resume module enables employees and managers to store a resume.

See: Resume: page 10 – 34

Tenure Tracking (US Public Sector)

The Tenure Tracking module enables managers to store information on an employee's tenure (completion of professional criteria and extended probationary period).

See: Tenure Tracking: page 10 – 36

Academic Rank (US Public Sector)

The Academic Rank module enables managers to store information on the academic rank for employees within Higher Education.

See: Academic Rank: page 10 – 38

HR Modules

Manage Employee Events

The Manage Employee Events (MEE) functionality consists of a set of low–level, workflow–enabled components which can be chained together in various combinations to match your enterprise's business processes. Some chained processes are predefined for you but you can use the Workflow Builder to configure others if you need to. The MEE components are as follows:

Assignment

The Assignment module enables a manager to change an employee's assignment information.

See: Assignment: page 11 – 4

Change Location

The Change Location module enables a manager to change an employee's work location.

See: Location: page 11 – 13

Change Manager

The Change Manager module enables a manager to transfer an employee to another supervisor, move the direct reports of one supervisor to another supervisor and to assemble a new set of direct reports to a new supervisor.

See: Change Manager: page 11 – 23

Individual Compensation Distributions (ICD)

ICD enables managers to assign one–time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can combine ICD with modules from Benefits and Payroll.

See: Individual Compensation Distributions: page 13 – 40

Other Employment Information

The Other Employment Information module enables you to update and retrieve assignment and employment information in assignment descriptive flexfields and localization–enabled flexfields.

See: Other Employment Info: page 11 – 19

Pay Rate

The Pay Rate module enables a manager to change an employee's overall pay rate or update an individual component of the pay rate.

See: Pay Rate: page 11 – 21

Special Information Types (SITs)

Special Information Types enable you to store additional information that is not currently captured by the system. You can store information in the following categories: People, Jobs, Positions, Skills. There are also two US–specific categories: OSHA and ADA.

See: Special Information Types (SITs): page 11 – 16

Termination

The Termination module enables a manager to end an employee's relationship with their employer. You can also use the Change Supervisor workflow process to reassign a terminated supervisor's reports.

Note: You cannot reverse a termination in SSHR.

You can combine the Termination module with the ICD module to create a severance pay process if required.

See: Termination: page 11 – 8

Work Schedule

The Work Schedule module enables a manager to change an employee's work schedule.

See: Work Schedule (Change Conditions and Change Hours): page 11 – 11

Views

Employee/Manager Views (3.4)

The Employee and Manager views offer the user access to specific information, for example, employment history, absence history, and salary history. Employees can view their own personal records and managers can view the records for the people they manage.

For information on configuring the Employee and Manager Views for SSHR release 3.4, see: *Implementing Oracle Self–Service Human Resources 3.4* (available on Metalink).

HR Views

The HR Views module offers a summarized view of specific employee information: Personal Information, Assignment Details, Compensation Activity, and Termination History. This module is used by the HR Professional.

See: HR Views: page 12 – 2

Payroll Modules

Individual Compensation Distributions (ICD)

ICD enables managers to assign one–time or recurring awards, bonuses, and allowances to qualified employees and individuals.

You can combine ICD with Payroll to create processes for employee voluntary deductions.

See: Individual Compensation Distributions (Chapter 13)

Online Payslip

The Online Payslip module enables an employee to view their payslip using a Web browser. The payslip can only be viewed by the specific employee.

See: Online Payslip: page 14 – 10

Online Tax Forms

The Online Tax Forms module enables an employee to submit US Federal W–4 tax forms using a Web browser.

See: Online Tax Forms: page 14 – 13

Personal Payment Methods

The Personal Payment Methods module enables an employee to determine how they are paid. They can also view third–party payments.

See: Personal Payment Methods: page 14 – 3

Recruitment Modules (SSHR 3.4)

For information on configuring the Recruitment functions for SSHR release 3.4, see: *Implementing Oracle Self–Service Human Resources 3.4* (available on Metalink).

Candidate Offers

The Candidate Offers module is used by managers to seek approval for a job offer, send it to an applicant, and track the applicant's response.

Training Modules (SSHR 3.4)

For information on configuring the Training functions for SSHR release 3.4, see: *Implementing Oracle Self–Service Human Resources 3.4* (available on Metalink).

Enroll in a Class

The Enroll in a Class module enables employees to choose to participate in training activities. Managers can also enroll their employees in training activities.

Cancel Enrollment

The Cancel Enrollment module enables employees and managers to cancel enrollment in a class.

SSHR Licences

To enable SSHR, you must first purchase the appropriate licence from Oracle. For information on licences, contact Oracle.

SSHR delivers Self–Service Benefits for program–based enrollments and Individual Compensation Distributions for rewards and voluntary contributions. Both features require the implementation of either the Standard Benefits or Advanced Benefits data model. Life event restrictions in the Advanced Benefits model allow you to use Self–Service Benefits at any time during the year.

> **Note:** For Standard Benefits customers, it is recommended the Benefits Election function be available only during the annual enrollment period. In other words, you should consider taking your enrollment web pages off–line during periods where you do not want benefits participants to make changes to their elections.

Predefined Self–Service Responsibilities and User Menus

SSHR modules are accessible from predefined responsibilities, each with a corresponding top level menu.

In this version of SSHR, the predefined responsibilities are:

- Employee Self–Service V4.0
- Manager Self–Service V4.0
- HR User Self Service
- New User Registration

The predefined responsibility for the HR Foundation application is:

- HR Foundation

The additional responsibilities provided by OSSWA (Oracle Self–Service Web Applications are:

- Workflow User Web Applications
- Preferences

See: Oracle Self–Service Web Applications User Guide

> **Note:** These responsibilities are provided as a starting point only. You should create your own responsibilities and menus using the predefined SSHR responsibilities and menus as examples. Otherwise, your changes may be lost during an upgrade.
>
> See: User Access and Security: page 5 – 2

User Menus

SSHR includes several predefined top–level menus:

- Employee Self–Service 4.0
- Manager Self–Service 4.0
- HR Professional V4.0

The Employee Self–Service menu contains the functions that employees can perform on their own records, for example, the Personal Details function. The Manager Self–Service menu contains the same functions as the employee menu plus additional functions that the manager can carry out for the employees for whom they are responsible.

The HR Professional menu is available for HR professionals who wish to view summarized information on employees.

You can also use the following menu for administration purposes:

- HR Web Administrator

See: Self–Service Menus: page 5 – 9

Navigation Options for Functions

Both employees and managers can access functions in one of two ways. They can either use the above menus and select the function using the corresponding menu option or they can display the Actions page and select the required function from the list of available actions.

Legislation–specific Menus

SSHR provides legislation–specific menus to give users access to the functions that are specific to a country.

See: Self–Service Menus: page 5 – 9

CHAPTER

2 Getting Started with SSHR

Overview

This section gives you a brief overview of the minimum tasks you need to complete to set up SSHR.

See: Minimum Requirements for an SSHR System: page 2 – 3

For a list of all implementation steps, see Implementation Steps for SSHR: page A – 2

Minimum Requirements for an SSHR System

The following procedure gives you the basic implementation steps that are required to enable you to run SSHR in a test environment. For information on running SSHR in a production environment, please see the detailed chapters in this Implementation Guide and also the Appendix, which lists the implementation steps.

To set up an SSHR system:

1. Ensure that Oracle Human Resources 11*i* is installed with the most up–to–date patch according to the readme file for SSHR at the time of installation.
2. Ensure that at least one business group has been set up in Oracle HRMS with at least two employee records (one record should be defined as the supervisor for the other).

   See: Adapting and Creating a New Business Group (*Oracle HRMS Applications User Guide*)
3. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self–Service Web Applications Implementation Manual* (available on Metalink).
4. Apply the patch for SSHR 4.x and make sure that all prerequisites are met, including those for the OSSWA Framework.
5. Complete the install and set–up of the OSSWA Framework.

   See: *Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications* (available on Metalink – technical note number: 139863.1)
6. If you have licensed SSHR, set the following profile option to ”Yes” at the site level.

   - HR: Self Service HR Licensed

   See: User Profiles (*Oracle HRMS Applications User Guide*)

   If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.
7. Add the Manager Self Service and Employee Self Service responsibilities to your users (use either new or existing users).

   See: Self–Service Responsibilities and User Menus: page 1 – 19

   See: Responsibilities (*Oracle HRMS Applications User Guide*)
8. Link the users to (new or existing) employee records in HRMS.

   See: Defining User Access and Menus: page 5 – 12

See: Users Window *(Oracle Applications System Administrator's Guide)*

For information on a typical SSHR function, please see: Understanding a Typical SSHR Function: page 3 – 2

CHAPTER

3 Understanding How SSHR Functions Work

Understanding a Typical SSHR Function

This chapter examines a typical SSHR function, Personal Information, and introduces the underlying concepts.

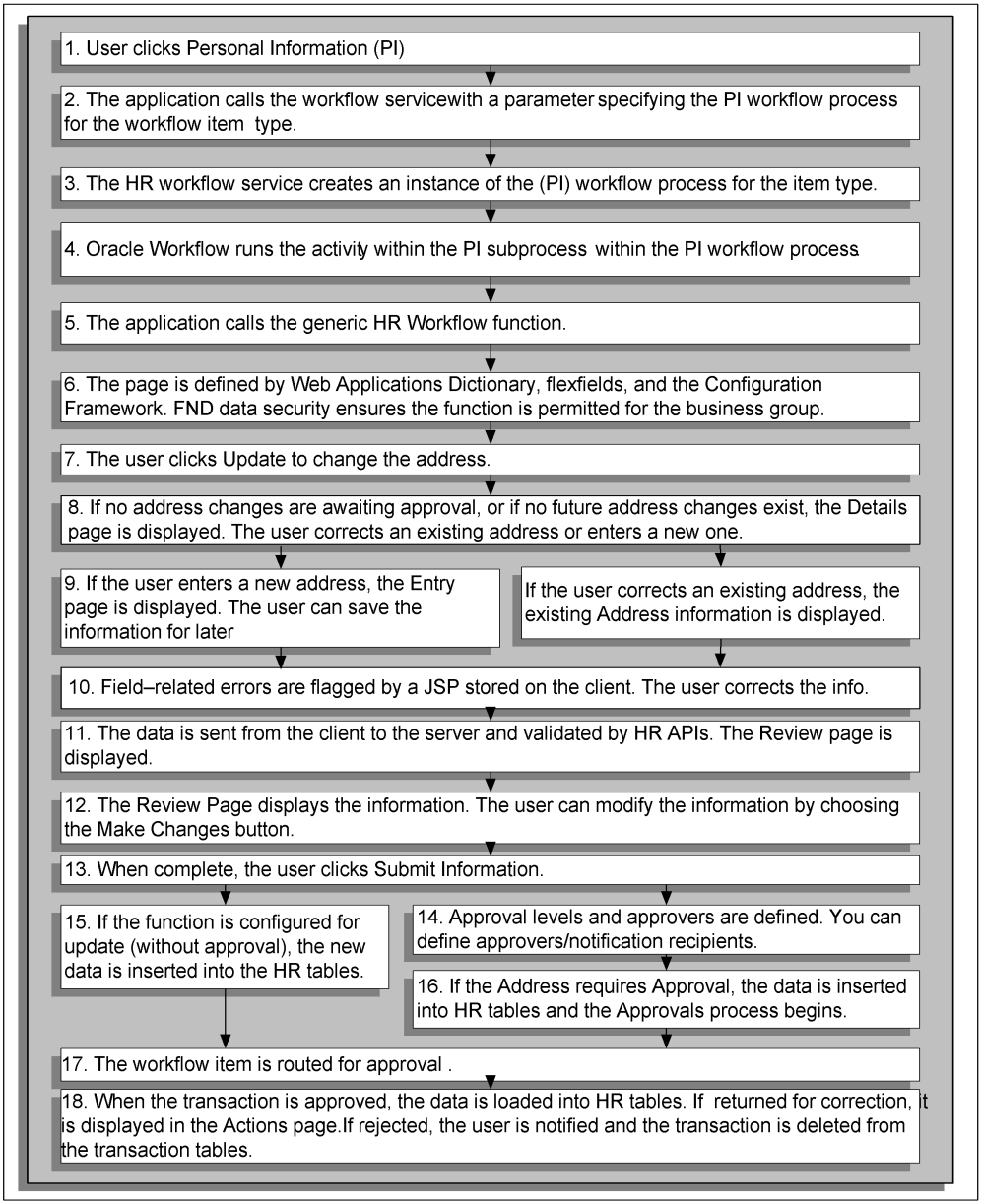
By following the functional flow of the Personal Information function, you should understand how information is passed from the web browser to Oracle Applications, how Workflow is used by SSHR, how the page layout is controlled by the Web Applications Dictionary and the Configuration Framework, and how the approvals process operates. The general principles described here can be applied to any other SSHR function.

The chapter includes an example of a typical SSHR Web page to illustrate the different elements that you can configure.

The configuration steps for SSHR functions and their web pages are discussed in detail in the subsequent chapters of the Implementation Guide.

How an SSHR Function Works in SSHR 4.0

The following flowchart and accompanying text describe the functional flows that occur when a user changes a main address using the Personal Information function.



1. The user chooses the Personal Information function from the user menu.

2. The application calls the HR workflow service (`OA.jspsOA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800`) with a parameter specifying the Personal Information workflow process for the workflow item type (`HR_MAINT_PERSONAL_DETAILS_PRC`).

   See: Self–Service Workflows: page 6 – 2

3. The HR workflow service creates an instance of the Personal Information workflow process for the item type.

   The FND data security is checked to make sure that this function is permitted for the legislation code of the current employee's business group. Personal Information is a global function that is available for all legislation codes.

   See: User Access and Security: page 5 – 2

4. Oracle Workflow runs the Maintain Personal Information activity (`HR_PERINFO_OVERVIEW_JSP_FCT`) within the Personal Information subprocess (`HR_PROCESS_PERINFO_JSP_PRC`) within the Personal Information workflow process (`HR_PERSONAL_INFO_JSP_PRC`).

5. The application calls the generic `HR_WORKFLOW_SERVICE.BLOCK` function. The HR Activity Type Value workflow attribute for this process activity is set to `HR_OVERVIEW_TOP_SS` with the Activity Type as `JSP`.

6. A page is displayed based on the definition of the `HR_OVERVIEW_TOP_SS` region in the Web Applications Dictionary and its nested subregions. The page is influenced by any context–sensitive flexfields and the cumulative effect of any Configuration Framework configurations that relate to these regions.

   See: The Configuration Framework: page 7 – 2

7. If no past address changes are awaiting approval or correction, or if no future–dated address changes exist, the Details page is displayed. The user specifies whether they want to correct an existing address or enter an entirely new one.

   The button displayed to the user will be either Update / View Future Changes or View Pending Approval.

8. If the user chooses to enter a new address, the Entry page is displayed. The user enters the information.

If required, the user can save the information and submit the transaction later. In this case, the changes entered so far are saved to the transaction tables without server–side validation.

See: Save for Later: page 3 – 10

If the user chooses to correct an existing address, the existing Address information is displayed. The user corrects the information.

9. When the user has entered the information (or is ready to complete the transaction), they click the Continue link at the bottom of the page. Any field–related errors (bad formatting, missing fields, and so on) are flagged by a JavaScript procedure stored on the client and the user is asked to correct this information.
10. Web page data is sent from the client to the server and server–side validation is performed by HR Application Programming Interfaces (APIs). If all fields are validated, the Review page is displayed.

    See: Review and Confirm: page 9 – 14
11. The Review page displays the information that the user has entered. If the user now wants to modify the address information, they can choose the Back button to return to the update page to make changes.
12. When the changes are complete, the user returns to the Review page and clicks the Submit Information link to save the changes.
13. The number of approval levels and approvers is determined by the configuration of Dynamic Approvals. If applicable, the user can insert additional approvers and / or notification recipients.

    See: Dynamic Approvals: page 8 – 2
14. If the Main Address part of the Personal Information function is configured for update without requiring approval, the new address data is inserted directly into the HR tables. (This step is the same process as step 18 for changes requiring an approval.)
15. If the Main Address part of the Personal Information function is configured to require approval, the data is inserted into HR transaction tables and the Approvals process begins for that item.
16. The workflow item is routed for approval according to the configuration of the Approvals process.
17. The approver can either approve or reject the transaction or return it to the user for correction.

    If the transaction is returned for correction, it is displayed for the user in the Actions Saved for Later table in the Actions page. The

user can reopen the transaction. The previous values are reloaded from the transaction tables ready for the user to make the required changes and resubmit.

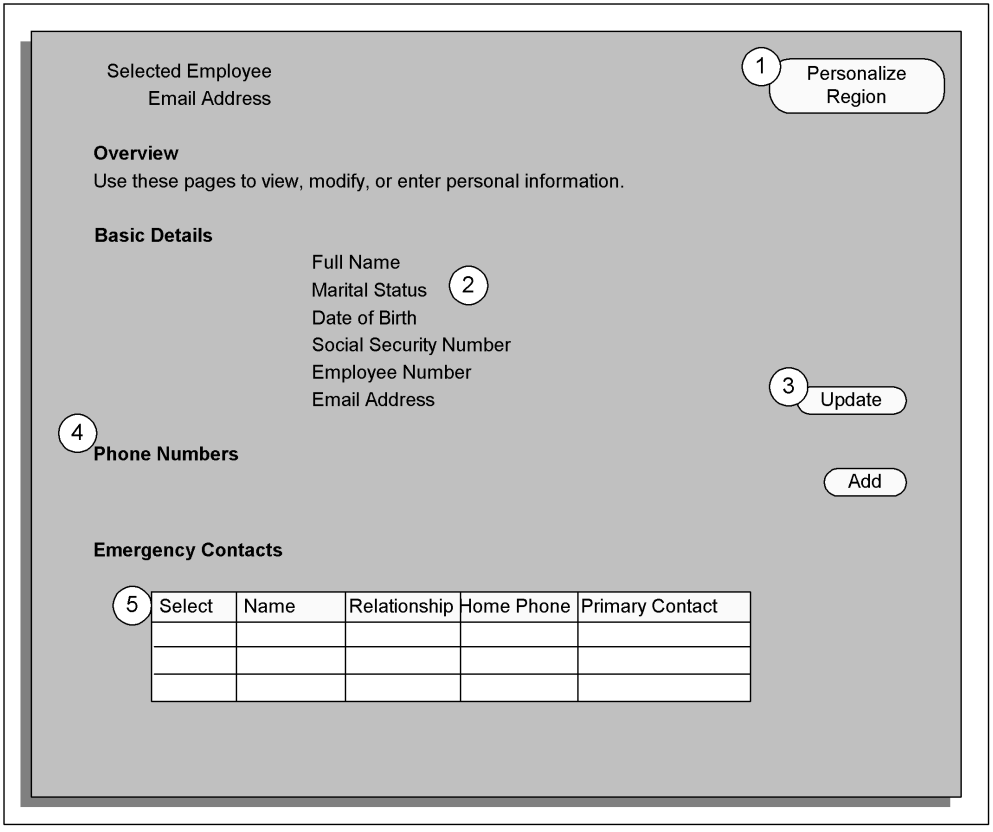
See: Save for Later: page 3 – 10

When the approver approves or rejects the transaction, the user is notified of the transaction status and the transaction details are deleted from the transaction tables. If the transaction is approved, the data is loaded into the HR tables.

A Typical SSHR Web Page

The following diagram shows a sample web page for the Personal Information function. The different elements that you can configure in the Configuration Framework are listed below.

Figure 3 – 1 Sample Web Page



The graphic above shows the following elements which you can configure using the Configuration Framework:

1. Enable configuration
2. Change the sequence of fields
3. Enable the user to update fields
4. Rename region items
5. Configure table views

See: The Configuration Framework: page 7 – 2

Managing Dates in SSHR

Effective Dates

If a user is prompted to enter an effective date, the application validates the entry to make sure the data is correct using specific criteria. The system date is the default date unless a future–dated assignment change has already been entered into the system. If a future–dated change has been entered, the day after the change date is used.

The following checks are then carried out in a chained process:

- hire_date

  Checks if the effective date entered is earlier than the hire date

- termination_date

  Checks if the effective date entered is earlier than the termination date

- future_assignment

  Checks if there are any future assignment changes with respect to the effective date entered

- pending_workflow

  Checks if there are changes pending in the workflow tables for the selected person

- correction_mode

  Issues a warning (alert) only if the latest effective date of the primary assignment is less than the SYSDATE

Future–Dated Changes

It is possible that an SSHR user may try and update information when a future–dated change is pending. This action triggers the following process:

- The application sends the user a message instructing them to contact their support representative
- The user is prevented from making any changes
- The workflow error process sends a message and description to the Sysadmin ID informing them that an attempt was made by a user to update information with a future–dated change pending

You then decide how to manage the update requested by the user. For example, you could cancel the future–dated change, implement the requested change to information, and then implement the future–dated change again. Alternatively, you can send a notification explaining that the update will be made at some point in the future.

> **Note:** A system administrator or other implementor of Self–Service Benefits can access the Change Session Date menu option for testing future dated enrollments. You should remove this menu item in your production environment so that benefits participants do not alter their enrollment date. To remove the Change Session Date item from the menu, query the BEN_SELF_SERVICE_BENEFITS menu option in the Menus window and delete the Change Session Date menu entry.

Save For Later

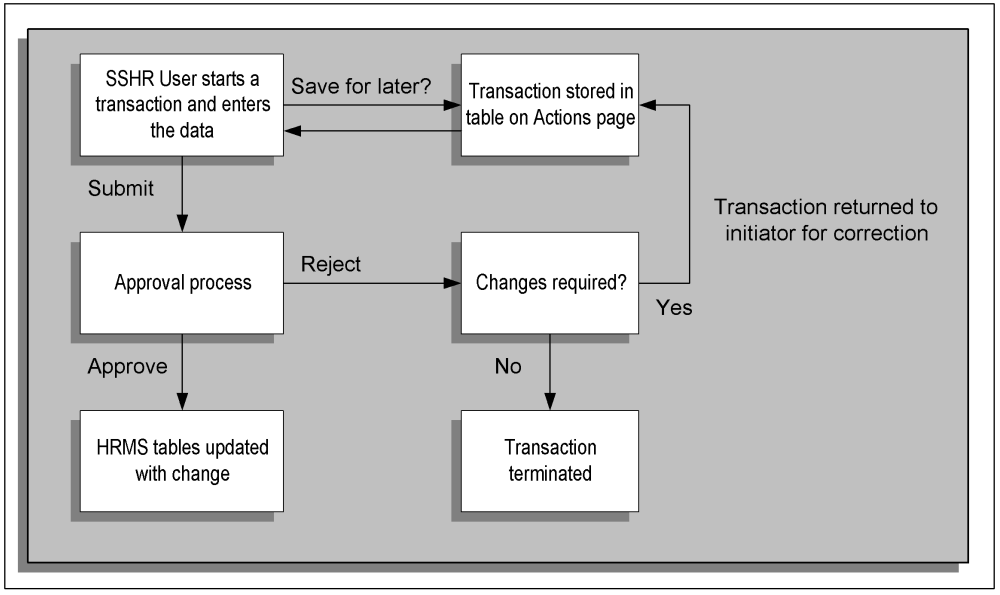
The Save for Later functionality enables a user to interrupt transactions before they are complete and save them so that they can be completed at a later point.

In addition, approvers can return transactions to the initiator for correction. In this case, the initiator can reopen the transaction, correct the information, and resubmit it for approval. The approvers can include informational notes to clarify the reason for returning the transaction.

Both suspended transactions and returned transactions are displayed in the Actions Saved for Later table on the Actions page.

Users can also access their saved functions using the All Actions Saved for Later menu option on the employee and manager menus.

Figure 3 – 2 Save for Later Functionality



The graphic above shows the two different ways in which transactions can be saved for later.

Route 1: When a user initiates a self–service transaction, they can either submit the transaction for approval immediately or save the transaction for subsequent processing. If the user submits the transaction immediately, the transaction is subject to the usual approval processes. If the user chooses to save the transaction for later, it is

suspended and the user can restart it or delete it from the Actions Saved for Later table in the Actions page.

Route 2: When a user has submitted a transaction for approval, the approver can either approve the transaction, reject the transaction, or return it for correction. If the approver returns the transaction for correction, the initiator can subsequently restart or delete it from the Actions Saved for Later table in the Actions page of the initiator.

> **Note:** If a transaction is interrupted due to user inactivity, a timeout, or a system failure, the interrupted transaction is also stored as a suspended transaction.

CHAPTER

4 Configuring SSHR

Configuration Overview

All Oracle Self–Service Applications, including the SSHR modules, are built on the Oracle Applications (OA) Framework to enable maximum flexibility. Although the SSHR modules are delivered with predefined settings which meet the HRMS requirements of the majority of enterprises with little or no configuration, there are many configuration options available to ensure that all your enterprise requirements are met.

This chapter provides an overview of the different configuration steps for SSHR and introduces a common configuration method that you can apply to any SSHR module in conjunction with the function–specific configuration steps. For detailed information on the configuration steps, see the following chapters:

- Managing User Access – Chapter 5
- Configuring Process Flows – Chapter 6
- Configuring Page Layouts – Chapter 7
- Approvals – Chapter 8

Guidelines for Configuring SSHR Functions

The best approach to take when configuring SSHR is to first configure a sample function, test it until you are satisfied with the results, and then repeat the steps for the other functions.

Start your configuration process by configuring a module for a particular group of users. It is important to consider both the module and the intended audience at the same time because, if required, you can configure multiple variations of the same module to suit different groups of users. For example, you might choose to implement one version of the Personal Information module for all employees, another version for one set of managers, and another version for a second set of managers.

User Access

You make your new version of the SSHR module available to your target group of users by creating an AOL function and attaching it to a menu. The menu is attached to a responsibility which you assign to your users.

You specify whether the AOL function is restricted to the employee's own records or whether a manager can use the function to select from a list of employees.

For each responsibility (or combination of responsibility and user), you need to define a security profile to restrict the user to an appropriate business group and, if required, a subset of a business group. A typical subset would be all employees in a specific organization or all employees reporting to the current user.

You also need to consider whether to allow users to access people in other business groups and whether users can access additional people who may grant them access to their records using the Release Employee Information function.

See: User Access and Security: page 5 – 2

Process Flows

If the SSHR modules are workflow–enabled (see: Summary of SSHR Modules table: page 1 – 7), you can choose to modify the predefined process flow if required. For example, you can chain two modules together (where permitted) or introduce additional branching logic.

See: Self–Service Workflows: page 6 – 2

Approvals

You must decide whether changes that users make using your modified function are subject to approval and who the approvers are. You can either use the Workflow Builder or PL/SQL, or both, to control transaction approvals.

See: Approvals: page 8 – 2

Page Layouts

In most cases, the predefined page layouts contain all the fields that users need to perform a transaction. However, you may decide that some changes are required. For example, you could change the field prompts to match terminology used by your enterprise. You can also add more detailed instructions to the web pages, display selected flexfield segments, and hide fields or sections of web pages.

You modify page layouts using the Configuration Framework and, occasionally, the Web Applications Dictionary.

See: The Configuration Framework: page 7 – 2

Module–specific Configuration Options

Detailed information on the configuration options for each module is given in the corresponding sections. Each section contains the following information:

- menu and function names
- workflow process names and attributes
- region, tip, and instruction names
- profile options

CHAPTER

5 Managing User Access

User Access and Security

SSHR uses the same security mechanisms as Oracle HRMS applications. By defining user profiles, security profiles, responsibilities, and menu structures, you can control who uses SSHR, which information they can access, and how they access it.

See: Security Overview (*Oracle HRMS Applications User Guide*)

The purpose of this chapter is to identify the key concepts relating to SSHR user access and security and to provide information on how to apply these concepts to address the needs of your enterprise.

Responsibilities

A responsibility combines low–level elements of user access configuration to control which functions the user can access (User Access to Functions) and on whom they can perform these actions (see User Access to People).

You define responsibilities in the same way as you define responsibilities for Oracle HRMS applications.

> **Note:** When you define your responsibilities, make sure they are available from Oracle Self–Service Web Applications.

See: Responsibilities (*Oracle HRMS Applications User Guide*)

See: Oracle Applications System Administrator's User Guide

User Access to People

The primary users of SSHR can be divided into two main groups: managers and employees (non–managers).

Employees (non–managers)

Employees can only access their own employee records.

Managers

Managers can process the records for other employees after selecting them from the People Search page.

Person Search

The Person Search page contains several tabs which are defined by the Employee's Menu menu.

Hierarchy

This page presents a hierarchical view of the employees reporting to the current user. The view is based on the supervisor hierarchy.

My List

This page contains a user–defined list of people for quick reference.

Search (Basic and Advanced Search)

This page enables a manager to search for any employee within the underlying security profile.

> **Note:** You can extend the security profile for managers by enabling the Release Employee Information function.
>
> See: Release Employee Information: page 9 – 11

The manager can process employees in the list directly or add them to My List for future reference.

Configuration Options

You can control user access to the People Search functions by excluding certain functions if required, for example, you can hide the Person Search function so that managers can only process the records for the employees displayed in their hierarchy.

See: Defining User Access and Menus: page 5 – 12

You can also control how managers search for employees by assigning profile options. For example, you can apply the Cross Business Group profile option to enable managers to search for employees across business groups.

See: User Profiles (*Oracle HRMS Applications User Guide*)

Security Profiles

SSHR uses security profiles to control a user's access to employee records. For example, a security profile can give a manager access to the records for all the employees in the department.

See: Security Profiles (*Oracle HRMS Applications User Guide*)

Employees (non–managers)

You can use the default View All security profile for the corresponding business group for the employee (non–manager) responsibilities because the employee functions restrict the user to accessing only their own record.

Managers

If you allow your managers to access the Search functions, you must create suitable security profiles. For most SSHR managers, the most appropriate security profile is a user–based profile with the Supervisor

Hierarchy check box flagged. This security profile dynamically generates the list of available employees based on the supervisor hierarchy (starting with the current user). Supervisor–based security allows you to set up a single security profile and use it for multiple users. To activate supervisor–based security, flag the Restrict by Supervisor check box in the Security Profile window.

See: Defining a Security Profile (*Oracle HRMS Applications User Guide*)

Alternatively, you can choose to disable the Search functions for an SSHR manager responsibility. In this case, you can assign the View All security profile to the users.

Release Employee Information

You can supplement the list of people who appear in a security profile by enabling the Release Employee Information function. With this function, users can allow other users (who are outside of the security profile) to access their records. Similarly, managers can use the Release Employee Information to allow a second manager (who is outside of the security profile) to access the records for one of their employees.

To illustrate a typical use of this function, imagine that an employee wants to transfer to another organization. The new manager may need to review the employee's absence history before the transfer can take place. However, this manager may be outside the employee's current business group and would therefore, be restricted by HRMS security access. The manager cannot access the employee's data from a Person Search because of the defined security profiles. With the Release Employee Information function, the employee granting access can search for the manager's name across all organizations and business groups and grant access to that person. This enables the manager to view the employee's absence history. However, you must ensure that the manager has a responsibility that satisfies the following conditions:

- includes appropriate manager functions, for example, Manager Views
- is associated with a security profile which has the "Allow Granted Access" check box flagged.

If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the "Allow Granted Access" option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers' capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as

Termination. To do this, disable the "Allow Granted Access" check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

See: Release Employee Information: page 9 – 11

User Access to Functions

You control user access to specific functions using function security. Functions are attached to menus which are then attached to responsibilities.

Navigation paths

The traditional navigation path for SSHR users is to select a function, for example, Personal Information or Change Manager, directly from a user menu. SSHR 4.0 continues to support this approach but also introduces a new navigation path which uses the Actions pages.

Accessing functions from the Actions pages:

Instead of selecting a specific function from the menu, the user selects either the Personal Actions function (for employees) or the Manager Actions function (for managers). SSHR displays a context–sensitive list of available functions.

Personal Actions

The Personal Actions page consists of several tabs which are defined by the Employee Enter Process hidden submenu.

See: SSHR Menus: page 5 – 9

See: Actions Page: page 9 – 8

The My Actions tab displays a list of available functions for the employee. To generate this context–sensitive list, SSHR takes the submenu defined in the HR:Personal Actions Menu profile option and excludes any legislation–specific functions that do match the legislation code of the user's business group.

Manager Actions

The Manager Actions page consists of several tabs which are defined by the Manager Enter Process hidden submenu.

See: SSHR Menus: page 5 – 9

See: Actions Page: page 9 – 8

The Employee Actions tab displays a list of functions available for the employee selected in the Employees tab. SSHR derives the list of

functions by taking the submenu defined in the HR:Manager Actions Menu profile option and excluding any legislation–specific functions that do not match the legislation code of the selected employee's business group.

> **Note:** If the manager first selected their own record, the submenu is derived using the HR:Personal Actions Menu profile option.

Accessing functions directly from a menu:

Managers

When a user selects a manager function directly from the menu, they are first presented with the Person Search page. From this page, they can select an employee for processing. The user is then taken to the corresponding web page for the function.

> **Note:** Data security starts after the user has selected an employee. If the function is specific to a legislation other than the legislation to which the selected employee belongs, an error message is displayed.

Other Employees

When a user selects an employee function directly from the menu, they are taken directly to the corresponding web page for the function.

> **Note:** Data security is checked after the user has selected a function. If the function is specific to a legislation other than the legislation to which the user belongs, an error message is displayed.

Legislation–specific Functions

Most SSHR functions are global and can be used on employees in any legislation. However, some functions are legislation–specific and must be restricted to employees in the corresponding legislation.

SSHR uses FND Data Security to enforce this restriction. A data security object has been defined on the combination of person and legislation and data security menus have been created for predefined functions. There is one data security menu for global functions and one for each legislation code. The predefined functions are associated with either the global data security menu or with one or more of the country–specific data security menus as appropriate.

Data security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each

grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code.

For example, a function on the global data security menu may be used with any employee but a function that is only on the US data security menu may be used only with employees in a US business group.

In addition to the data security menus that are available for predefined functions, there is a similar set of data security menus to which you can attach your custom functions. The data security grants are already in place.

See: Data Security Menus: page 5 – 10

Users and Responsibilities

You define SSHR users in the same way as you define users for Oracle HRMS applications.

See: Users Window (*Oracle Applications System Administration Guide*)

However, the Person field of the Users window is particularly important for SSHR as it acts as the link between the professional forms interface and SSHR. It ensures that the user name is linked to the correct employee records. For example, if you were to create a user and assign an SSHR responsibility to this user, the correct employee records would only be displayed in SSHR if the user's name is entered in the Person field.

See: Responsibilities (*Oracle HRMS Applications User Guide*)

New User Registration

The New User Registration functions enable new users to register their own details and create their own users for SSHR. You can also add a user hook which generates the user name when the user clicks a button on the web page.

You can enable the New User Registration functions for both employees and non–employees. The non–employee registration form is usually used in conjunction with Advanced Benefits.

See: New User Registration: page 9 – 19

User Profiles

You apply user profiles to control how the SSHR application runs. You can set profile options at site level, application level, responsibility level, and user level. The individual profile options are specified in the sections on each module.

See: User Profiles (*Oracle HRMS Applications User Guide*)

User Access to Functions

Manager and Employee Functions

You can control which functions employees and managers can access by adding or removing functions from the user menus. For example, you could restrict employee access to the Termination function by only including it in the Manager menu.

See: Defining User Access and Menus: page 5 – 12

Self–Service Menus and User Access

SSHR uses four types of menu: top–level menus, submenus, hidden submenus, and data security menus. The following section looks at each of these menus in detail.

The predefined menus are overwritten whenever an SSHR patch is applied so any changes you have made to the menus are lost. For this reason, you should create at least one top–level menu for employees and at least one for managers.

> **Note:** You can avoid having to configure several similar menus by adding all employee and manager functions to each of your menus and then defining menu exclusions against the responsibility to excluse specific functions from groups of users.

See: Defining Menus for SSHR: page 5 – 12

Types of Menus

Top–level Menus

The top–level menus define the choices that the user sees on their menu when they log in to SSHR. For example, the top–level menu for the Employee Self–Service responsibility is the Employee Self Service V4.0 menu.

See: Defining User Access and Menus: page 5 – 12

Submenus

Submenus group together functions in a logical group on the top–level menu, for example, the Professional Details functions are grouped together in the Manager Professional Details submenu. The predefined submenus for SSHR include:

- Manager Professional Details
- Benefits Self–Service

Hidden Submenus

By attaching a submenu to the top–level menu without defining a prompt, you can assign functions to the responsibility but hide them from the user. This means that the user cannot select these functions directly. The following hidden submenus are predefined for SSHR:

- Manager Enter Process
- Manager Actions Menu

- Personal Actions Menu

SSHR uses these submenus to determine the availability of functions in other places. For example, the Manager Enter Process submenu controls the tabbed regions appearing on the Manager Enter Proces page. The Manager Actions menu controls which functions are available on the Actions page for a manager to perform on other employees. The Personal Actions menu controls which functions are available to a user on the Personal Actions page. This menu also controls which functions are available from the Actions page when the manager selects their own record.

Data Security Menus

SSHR uses the data security menus to determine which functions are global and which are for specific legislations.

The data security menus for SSHR are:

- HR_GLOBAL_SS_FUNCTIONS_SEED

  Contains all the functions that are accessible across legislations (global functions)

- HR_cc_SS_FUNCTIONS_SEED (where cc is legislation code)

  Contains all the functions that are specific to a legislation

- HR_GLOBAL_SS_FUNCTIONS_CUSTOM

  Contains customer functions that are accessible across legislations

- HR_cc_SS_FUNCTIONS_CUSTOM (where cc is the legislation code)

  Contains customer functions that are specific to a legislation

See: Legislation–specific Functions: page 5 – 6

Menus for Employees (Non–Managers)

If you create a new Employee menu and want to use the Personal Actions functionality, you need to add the following submenus to your new menu:

- Employee Enter Process Menu (or your configured copy of this menu)
- Personal Actions Menu (or your configured copy of this menu)

You must also add the following functions to your new menu:

- Personal Actions V4.0 (or your configured copy of this menu)

- Suspended Actions V4.0

You must also make sure that the value for the HR:Personal Actions Menu profile option for any responsibilities that use the new employee menu to match the names of the personal actions submenus you selected above.

Menus for Managers

If you create a new Manager menu and want to use the Manager Actions functions, you need to add the following submenus to your new menu:

- Manager Enter Process Menu (or your configured copy of this menu)
- Personal Actions Menu (or your configured copy of this menu)
- Manager Actions Menu (or your configured copy of this menu)

You must also add the following functions to your new menu:

- Manager Actions Tree View V4.0 (or your configured copy of the function)
- Suspended Actions Mgr V4.0

You must also make sure that the values for the HR:Manager Actions Menu and HR:Personal Actions Menu profile options for any responsibilities that use the new manager menu to match the names of the manager actions and personal actions submenus you selected above.

Defining Menus for SSHR

The predefined self–service responsibilities are linked to a menu that contains a number of functions. We recommend that you create a menu based on the predefined menus and, if necessary, add or remove functions so that the menus accurately reflect your organization's structures and business processes. You can base your configuration on the sample menus provided although you should not change the predefined menus directly.

You configure menus in the Menus window.

▶ **To set up menus for self–service:**

1. Review the sample functions in the Employee Self–Service User Menu and the Manager Self–Service User Menu. Decide which functions you want to include in your user menus.

   See: Self–Service Responsibilities and User Menus: page 1 – 19

   See: User's Menu (*Oracle Applications System Administrator's Guide*)

2. Create your own menu based on the predefined menus.
3. Make sure that all the functions you require are listed in the Function column of your menu.
4. Make sure the following submenus are attached to your custom menu:
   - Employee Enter Process menu – for employee and manager menus
   - Personal Actions menu – for employee and manager menus
   - Manager Actions menu – for manager menus
5. Make sure that the following functions are attached to your custom menu:
   - Personal Actions V4.0 (or a configured copy) – for employee menus
   - Manager Actions V4.0 (or a configured copy) – for manager menus
   - Suspended Actions – for employee and manager menus
6. Save your work.

Defining User Access to Self–Service Functions

To define user access to self–service functions, you need to define a user, assign a responsibility, assign profile values, and assign a menu to the responsibility. The following process takes you through the separate procedures.

We recommend that you create a different responsibility for each target group of users.

▶ **To define a responsibility for a self–service application:**

1. Follow the standard procedure for creating a responsibility.

   See: Defining a Responsibility (*Oracle Applications System Administration Guide*)

2. Define your responsibilities to be available from Oracle Self–Service Web Applications.
3. Consider whether you should create menu of function exclusions to restrict the employee menus.

▶ **To set your system profiles:**

1. Set the system profiles for security groups.

   If Security Groups are not enabled, use the System Profile Values window to link your responsibility to a security profile in the appropriate Business Group.

   If Security Groups are enabled, you can set the security profile at the user level using the Assign Security Profiles window.

   > **Note: Self–Service Benefits users:** If you do not link your responsibility to your business group using the HR:Security Profile, any benefits participants who attempt to enroll will receive an error message indicating that they cannot enroll.

2. Set any additional required profiles.
   - HR: Security Profile
   - HR:Cross Business Group (if you want users to be able to select employees from different business groups in lists of values)
   - HR:Restrict Transactions across Business Groups in SSHR (if you want to stop your users from performing transactions on employees from different business groups. This profile option works together with the HR:Cross Business Group profile option).
   - HR:Personal Actions Menu (for SSHR)

- HR: Manager Actions Menu (for SSHR)

▶ **To define a user:**

1. Define the people you would like to access Self–Service. There are two ways to do this. You can follow the typical steps for defining a new user and then assign each individual user to a responsibility that enables access to self–service benefits.

   See: Users Window *(Oracle Applications System Administrator's Guide)*

   Alternatively, you can set up concurrent programs to automate this manual process.

   See: Creating Batch User Accounts with Concurrent Programs: page 5 – 20

Defining Functions for SSHR

If required, you can create your own SSHR functions using the predefined functions as a basis.

You can then configure how the function is accessed, for example, whether it is available from the Actions pages or from the People Search pages.

For information on modifying the related workflow processes, see Configuring Workflow Objects: page 6 – 5

You create the function in the Form Functions window using the system administrator responsibility.

▶ **To create a function based on a predefined SSHR function**:

1. Query the function on which you want to base your function, for example, Personal Information V4.0 (HR_PERINFO_SS).
2. Insert a new record beneath it in the table.
3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above.

   Note: The Function Name and User Function Name fields must be unique so insert your standard prefix in front of the value duplicated from the previous record.
4. In the Parameter field, note that the pItemType parameter value is 'HRSSA' (the internal name for the predefined HRMS Self Service workflow item type). Leave this value unchanged but change the pProcessName parameter from HR_PERSONAL_INFO_JSP_PRC to the name of your configured process.

   See: Self–Service Workflows: page 6 – 2
5. Note that the HTML call field is OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_PERINFO_SS. Change the OAFunc parameter to your configured function name.

▶ **To make the function available globally or for specific legislations**:

1. If this function is for a specific legislation, add it to the appropriate HR_cc_SS_FUNCTIONS_CUSTOM data security menu. Otherwise, add it to the HR_GLOBAL_SS_FUNCTIONS_CUSTOM data security menu.

   Note: You do not need to enter a prompt for the function. Also, make sure that the Granted check box is unchecked.

2. Save your work.

▶ **To add the function to an employee menu in the Menus window:**

1. Use the system admininistration responsibility to display the Menus window.
2. Add the function to the top–level menus and / or submenus as appropriate. For example, you may want to add the function to your configured copy of the Employee Self–Service V4.0 menu.

   See: Defining Menus for SSHR: page 5 – 12

▶ **To make a function available from the Actions pages:**

1. If this function is appropriate for employees to perform on themselves, add it to your configured copy of the Personal Actions menu.
2. If this function is appropriate for managers to perform on other employees, add it to your configured copy of the Manager Actions menu.

   Note: You only add the employee version of the function to the Manager Actions menu.

▶ **To make a function available from the Manager menus via the People Search page:**

To make this function available to managers directly from the menu via the People Search page, you need to create a matching function. Model your matching function on the corresponding predefined manager function.

You create your matching function in the Form Functions window.

1. Query the predefined manager function on which you want to base your function, for example, Personal Information Manager V4.0 (HR_PERINFO_MGR_SS).
2. Insert a new record beneath it.
3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above. Insert your standard prefix where required.
4. In the Parameter field, change the pCalledFrom parameter to match the name of your original custom function (as created in the above procedure)

   The HTML call field is
   OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionA

pplicationId=800. This corresponds to the Person Search page. When the user selects a person from this page, SSHR calls the AOL function specified by the pCalledFrom parameter, appending the selected person_id to the pPersonID parameter specified for that function.

5. Save your work.
6. Add the function to the top–level menus and / or submenus as required.

   Note: There is no need to add this type of function to the data security menus or to the actions menus.

Batch Creation of User Accounts

Every Oracle HRMS user needs to be registered with a user name, password and responsibility. The creation or deletion of these user accounts can often be time consuming, particularly if you are restricting a user's access with a responsibility associated with a security profile and a menu.

A set of concurrent programs have been created for Oracle HRMS applications to automate the creation and management of large groups of user accounts. These programs are particularly useful if you have to create a large number of user accounts at initial installation, for managing new hire user accounts, or for managing accounts for terminated employees. The concurrent programs are:

- User Account Employee Extract Process
- Data Pump Engine
- Data Pump Batch Exceptions Report

Before you can use the concurrent programs however, you must write custom logic to reflect your enterprise's unique business rules. A user hook in the hr_user_acct_api is provided for you to do this.

You can find sample user hook code in the following package:

- $PER_TOP / patch / 115 / sql / hrhksmpl.pkb

Features of the Create Batch Users Process

The create batch users process only creates new responsibilities or profile option values for the new responsibility you create in the batch. This is for Oracle HRMS Applications only. The batch process does not create security profiles either. However, if you create a security profile, in Oracle HRMS, you can assign the security profile to a new responsibility that is created for a user in the batch process. The batch process does not create security attributes for a responsibility or a user.

A naming convention you might use is email ID with a responsibility name. For example, email ID JSMITH associated with the Manager Self Service responsibility could be JSMITH_MSS. If you have set up security profiles for managers in Oracle HRMS you can associate the security profile name to a user, a responsibility and a security profile. For example, the SEC_PF security profile could be JSMITH_MSS_SEC_PF.

You can create a template responsibility for the batch process. If you create a template responsibility, or use the predefined Manager Self Service responsibility, you can code a new responsibility created by the

user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibilities attributes, by setting values in the communication area, hr_user_acct_utility, of the API.

Creating Batch User Accounts with Concurrent Programs

To create batches of users you must first write user hooks with your own custom logic.

See: Writing User Hooks to Create Batch User Accounts: page 5 – 25.

When you have created user hooks, you can run a set of concurrent programs to manage the batch creation of users on an ongoing basis.

You run the concurrent programs from the Submit Requests window.

▶ **To create batch user accounts with concurrent programs:**

1. Run the User Account Employee Extract Process

   This program extracts employee records and creates a batch file of user accounts to be created or deactivated.

   See: User Account Employee Extract Process

2. Run Data Pump Engine

   This program uses the batch from the employee extract process and calls the HR API to create or deactivate user accounts.

   See: Data Pump Engine

3. Submit Data Pump Batch Exceptions Report

   This program reports errors in the Data Pump Engine.

   See: Data Pump Batch Exceptions Report

User Account Employee Extract Process

This extract process produces output records which are used by the Data Pump Engine. The Data Pump Engine calls the hr_user_acct_api to create or deactivate user accounts.

The batch name is written to the HR_PUMP_BATCH_HEADERS table. The extracted employee records are written to the HR_PUMP_BATCH_LINES table. The batch line table has defined generic attributes but for each API, the Data Pump generates a view on the HR_PUMP_BATCH_LINES table to reflect the parameters of the API.

The specific views tailored for the hr_user_acct_api are:

- hrdpv_create_user_acct

  Records for creating new user accounts can be mapped to this database view

- hrdpv_update_user_acct

  Records for terminated employees whose user accounts are to be inactivated can be mapped to this database view

  Note: You must use a meaningful batch name. For example, run type and date range or another parameter. The batch name is the only way you can identify which batch to select in the Employee Data Pump process and the Data Pump Batch Exceptions Report processes.

▶ **To run the user account employee extract process:**

1. Access the User Account Employee Extract Process concurrent program.
2. Enter a batch name to identify the batch.
3. Enter the following date input parameters:
   - Start Date

     defaults to SYSDATE. This parameter sets the start date from which employee records are extracted
   - End Date

     defaults to SYSDATE. This parameter is used in conjunction with the start date parameter to set a date range for the extraction of employee records
4. Enter the following organization input parameters:
   - Organization

     this parameter comprises a list of all the business group organizations that the responsibility is associated with. If you select an organization from the list of values, the program only extracts records from the selected organization.

     Note: If you enter values in the Organization parameter, they are superceded by any values you enter in the Organization Hierarchy, Organization Hierarchy Version, and Parent Organization parameters. These parameters always take precedence and replace the values entered in the organization parameter and work together as a set.
   - Organization Hierarchy

     organization hierarchy name for the responsibility's business group. This parameter contains an list of all the organizations hierarchies in the business group.
   - Organization Hierarchy Version

organization hierarchy version for the responsibility's business group. This parameter contains an list of the organization hierarchy versions selected in the organization hierarchy parameter.

- Parent Organization

  parent organization within the hierarchy. Selecting the parent organization will extract records from this organization and any organizations below the parent organization.

See: Concurrent Programs, *(Oracle Application's System Administration Guide)*

5. Enter the Run Type input parameters by selecting a processing option from the list of values. The processing options are:

   - Create User Account for New Hires

     selects all employees hired between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

   - Create User Accounts for All Employees

     selects all employees as of the end date, within the organization or organization hierarchy. The start date parameter will be ignored and employees terminated before the end date will not be selected either. This run type is used on the initial implementation and is usually used once.

   - Inactivate User Account for Terminated Employees

     selects all employees terminated between the start date and end date parameter within the organization or organization hierarchy. Once selected, the terminated employee's user account is end dated. This run type is used on an ongoing basis to end date terminated employee accounts within the date range.

   - Create and Inactivate User Accounts

     runs two queries. The first query selects all employees hired between the start date and end date within the organization or organization hierarchy. The second query selects all employees terminated between the start date and end date within the organization or organization hierarchy. This run type is used on an ongoing basis.

Note: Each employee extracted from the database is recorded in the hr_pump_batch_line table. The hrdpv_create_user_acct view has been defined to map create user accounts to the hr_pump_batch_line table. The hrdpv_update_user_acct view has been defined to map inactivate user accounts to the hr_pump_batch_line table. You can access these views because the API column name is used to identify the record rather than the generic names used in the hr_pump_batch_lines table.

Data Pump Engine

The Data Pump Engine will call the hr_user_acct_api to perform data validation and loading operations. The employee data is recorded in the hr_pump_batch_lines table.

Note: You must run the User Account Employee Extract Process before you run the Data Pump Engine process. The Data Pump Engine depends on the batch id the User Account Employee Extract process creates.

▶ **To run the Data Pump Engine concurrent program:**

1. Access the Data Pump Engine concurrent program.
2. Enter the following parameters:
   - Batch Name

     you must enter the same batch name as you did in the Employee Extract Process. The Batch Name is the only information you have to identify which batch to run
   - Validation Mode

     you can set two values, YES or NO. A YES value enables you to review errors in the batch, or related records in a batch, and change them before any are committed to the database.

     A NO value will commit the data to the database if there are no errors. If there are errors the data will not be committed to the database and you can fix the errors and rerun the batch.

DataPump will set the Line Status to one of the following values:

- E – Error
- C – Completed
- U – Unprocessed
- V – Valid

See: Concurrent Programs, *(Oracle Application's System Administration Guide)*

See: Oracle HRMS Data Pump, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*

Employee Data Pump Exceptions Report

Each employee record is recorded in an individual batch line. The data pump exceptions report will show whether the error is from the batch header or batch line. You can identify which person record is in error from the person id in the exception report.

> **Note:** You must run the User Account Employee Extract Process before you run the Data Pump Engine and Data Pump Batch Exception Report processes. The Data Pump Engine and Data Pump Batch Exception Report processes depend on the batch id the User Account Employee Extract process creates.

▶ **To run the Data Pump Batch Exceptions report:**

1. Access the Data Pump Process Exceptions Report concurrent program.

   > **Note:** You can run the Data Pump Engine and Data Pump Batch Exception Report processes in sequence. See: Running Concurrent Processes, *(System Administrator's Guide*)

   See: Oracle HRMS Data Pump, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*

Writing User Hooks for the Batch Creation of User Accounts

Before you write your user hook, you must review your employee population and create a standard user name format, responsibility, and security profile for your enterprise. When you have defined a standard and created any security profiles or security groups you need, you can begin to write your user hook.

You can create a template responsibility for the batch process. If you create a template responsibility or use the predefined Manager Self–Service responsibility, you can code a new responsibility created by the user hook to inherit the template responsibilities attributes. You can then overwrite the template responsibility's attributes by setting values in the communication area of the API, hr_user_acct_utility.

You can find sample user hook code in the following package:

- $PER_TOP / patch / 115 / sql / hrhksmpl.pkb

▶ **To set up the prerequisites for writing user hooks:**

1. Create a security profile in Oracle HRMS and, using your naming standard, associate the security profile and responsibility to a new user in your user hook code.
2. Implement security groups to manage security profiles with the Enable Security Groups profile option. By implementing security groups, you can associate more than one security profile to a single responsibility.

   Note: Before you write user hooks, run the Security List Maintenance concurrent process. This ensures that the security profiles work.

   Note: If you plan to use security groups in a responsibility defined for use in Oracle Self–Service Web Applications, or plan to create a new responsibility for use in Oracle Self–Service Web Applications, set the Enable Security Groups profile option at the application level: Oracle Self Service Web Applications.
3. Set up a guest user account in Oracle Applications by setting the GUEST USER PASSWORD profile option. This must be in the format <username / password>. You can obtain and verify the guest user account with your Database Administrator.
4. Use the Define System Profile Option Value in System Administrator responsibility to set a security profile at Site or Application level. This is necessary because security profile option values can be set at Responsibility or User level with the batch process.

Note: The sample user hook is called hrhksmpl.pkb and each code block is documented. You can also find a copy of the sample in the following directory $PER_TOP / patch / 115 / sql.

See: API User Hooks, *APIs in Oracle HRMS (Implementing Oracle HRMS)*

See: Sample Code, *Oracle HRMS Data Pump (Implementing Oracle HRMS)*

Tables Updated in the Batch Process

The batch process inserts records into the following FND tables:

- FND_USER
- FND_USER_RESP_GROUPS

  to enable a new user to use a designated responsibility
- FND_RESPONSIBILITY

  if new responsibilities are created in the custom user hook module for the new user
- FND_RESPONSIBILITY_TL

  stores the translated value of responsibility name
- FND_RESP_FUNCTIONS

  if the new responsibility has function exclusion rules
- FND_PROFILE_OPTION_VALUES

  to set profile option values for any newly created responsibility for the user.
- PER_SEC_PROFILE_ASSIGNMENTS

  if security groups are enabled.

The batch process automates the functionality of the Define User Form and inserts records into the following FND tables:

- FND_USER
- FND_RESP_GROUPS

  Note: Security attributes for a user cannot be created in the batch process

The batch process automates the functionality of the Define Responsibility Form and inserts records into the following FND tables:

- FND_USER_RESP_GROUPS

- FND_RESPONSIBILITY_TL

  Note: Security attributes for a responsibility cannot be created in the batch process

The batch process automates the functionality of the Profile Option Value Form and inserts records into the following FND table:

- FND_PROFILE_OPTION_VALUES

▶ **To write batch user hooks with your own custom business logic:**

1. To create batches of users you need to write PL/SQL programs in the user hooks of the following API:

   - hr_user_acct_api

   This API contains two procedures:

   - hr_user_acct_api.create_user_acct

     used to create a new user

   - hr_user_acct_api.update_user_acct

     used to inactivate user accounts, for example on termination of an employee

▶ **To set up the Create User API procedure:**

1. Write a PL/SQL program to communicate to the API the user name, password, responsibility, and profile to use when it creates a new user account for the employee in the process.

   There are two user hook points in the create user procedure:

   - hr_user_acct_bk1.create_user_acct_b

     before–process hook point

   - hr_user_acct_bk1.create_user_acct_a

     after–process hook point

   Use the before–process hook for the PL/SQL program. The program enters these values into the global variables or record structures in hr_user_acct_utility.

   Note: You can supply passwords for the new user account or leave the API to generate a random string. The string will be in an 8 character alphanumeric format.

2. Write a PL/SQL program for the after–process hook if you leave the API to generate a password. The program must save the password of the new user account to a file that can be accessed by a

system administrator. This is necessary because the password created by the API is encrypted when it is saved to the FND_USER table in the database. You must capture the password before it is encrypted so that you can notify employees of their initial password.

Note: If you supply a password, you may not need to write a user hook for this after–process hook point.

▶ **To set up the Update User API procedure:**

The update user API procedure is used to inactivate employees. The API end dates the employees record in the FND_USER and FND_USER_RESP_GROUPS tables and is not meant for general purpose update.

There are two user hook points in the update user procedure:

- hr_user_acct_bk2.update_user_acct_b

  before process hook point

- hr_user_acct_bk2.update_user_acct_a

  after process hook point

  The before process user hook point is used for your extra validation. The API will not pick up any values from your user hook.

  The after process user hook point executes any extra logic after the main API validation and processing logic has successfully completed and the update process is finished.

▶ **To carry out the remaining steps:**

1. Compile the custom package you have created after you have written your user hooks.
2. Register and link your custom package procedures to the appropriate API user hooks when you have compiled the package.

   See: API User Hooks *(Implementing Oracle HRMS)*

   A sample script to register and link your custom package and procedures is provided below.

Sample code

```
DECLARE
 ln_api_hook_call_id NUMBER;
 ln_object_version_number NUMBER;
 ln_api_hook_id NUMBER;
```

```
  BEGIN

 -- get api_hook_id for the seeded before process user hook
package procedure
 SELECT ahk.api_hook_id
 INTO  ln_api_hook_id
 FROM  hr_api_hooks ahk
   ,hr_api_modules ahm
 WHERE ahm.module_name = 'CREATE_USER_ACCT'
 AND ahm.api_module_type = 'BP'
 AND ahk.hook_package = 'HR_USER_ACCT_BK1'
 AND ahk.hook_procedure = 'CREATE_USER_ACCT_B'
 AND ahk.api_hook_type = 'BP'
 AND ahk.api_module_id = ahm.api_module_id;

 -- insert a row into HR_API_HOOK_CALLS for before process user
hook custom package procedure

 hr_api_hook_call_api.create_api_hook_call(
  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),
  p_api_hook_id   => ln_api_hook_id,
  p_api_hook_call_type => 'PP',
  p_sequence   => 1,
  p_enabled_flag  => 'Y',
  p_call_package  => 'MY_USER_ACCT', -- your custom package name
  p_call_procedure => 'CREATE_USER_ACCT_B', -- your custom package
procedure name
  p_api_hook_call_id  => ln_api_hook_call_id,
  p_object_version_number => ln_object_version_number
 );


 -- get api_hook_id for the seeded after process user hook package
procedure
 SELECT ahk.api_hook_id
 INTO  ln_api_hook_id
 FROM  hr_api_hooks ahk
   ,hr_api_modules ahm
 WHERE ahm.module_name = 'CREATE_USER_ACCT'
 AND ahm.api_module_type = 'BP'
 AND ahk.hook_package = 'HR_USER_ACCT_BK1'
 AND ahk.hook_procedure = 'CREATE_USER_ACCT_A'
 AND ahk.api_hook_type = 'AP'
 AND ahk.api_module_id = ahm.api_module_id;


 -- insert a row in HR_API_HOOK_CALLS for after process user hook
custom package procedure
```

```
 hr_api_hook_call_api.create_api_hook_call(
  p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),
  p_api_hook_id   => ln_api_hook_id,
  p_api_hook_call_type => 'PP',
  p_sequence   => 1,
  p_enabled_flag  => 'Y',
  p_call_package  => 'MY_USER_ACCT',
  p_call_procedure => 'CREATE_USER_ACCT_A',
  p_api_hook_call_id  => ln_api_hook_call_id,
  p_object_version_number => ln_object_version_number
 );

  EXCEPTION
 when others then
  dbms_output.put_line('Error in seeding user hook procedures: '
|| sqlerrm);
  END;

  /
  commit;
  exit;
```

Execute User Hook Pre–Processor

When you have registered and linked your custom package procedure to the API you should execute the user hook pre–processor program. Run the hrahkone.sql found in $PER_TOP / patch / 115 / sql directory to do this. However, you'll need to know the internal api_module_id for the HR_USER_ACCT_API before running the script. To find the internal api_module_id you should run the script below:

```
  SELECT api_module_id
  ,api_module_type
  ,module_name
 FROM  hr_api_modules
 WHERE module_package = 'HR_USER_ACCT_API';
```

You should see results similar to those below:

```
API_MODULE_ID API_MODULE_TYPE     MODULE_NAME
-------------------------------------------------------
     383 BP                       CREATE_USER_ACCT
     384 BP                       UPDATE_USER_ACCT
```

Note: Your api_module_id will be different from the one above.

Use your own API module id when executing hrahkone.sql. If you have a customer package for UPDATE_USER_ACCT hook point, you will need to run hrahkone.sql twice. Once for the api_module_id for CREATE_USER_ACCT hook call and second for the UPDATE_USER_ACCT hook call.

3. Enter any new message text for the messages that you issue in your custom package when you have run the pre–processor program. Use an Application Developer responsibility in Oracle Applications to create your message text.

4. Ensure you have set the application level correctly if you use security groups to manage security profiles. For example, in SSHR you must set the application level to Oracle Self Service Web Applications. Set the security profile option to the application level if you need to associate the responsibility with another HRMS application.

   This updates the following tables: per_sec_ profile_ assignments, and fnd_user_resp_groups

5. Make sure that the Enable Security Groups profile option is Yes.

6. Set the Data Pump error parameters. These parameter control aspects of the Data Pump Engine process.

   See: Oracle HRMS Data Pump (*Implementing Oracle HRMS*).

   > **Note:** You must set the MAX_ERRORS_ALLOWED parameter to see all the errors logged during the run. This parameter controls how many errors are issued before the engine stops processing. The default value for the parameter is 20 or the chunk size. If you do not set this parameter value, the engine will stop processing after 20 errors.

7. Test the custom packages by running the following programs:. To test, run the User Account Employee Extract concurrent program to create batches of extracted employees. Run the Data Pump Engine concurrent program to process your batch, and run the Data Pump Batch Exceptions

   - User Account Employee Extract concurrent program – to create batches of extracted employees
   - Data Pump Engine concurrent program – to process your batch
   - Data Pump Batch Exceptions concurrent program – to report any errors.

   If necessary, you can rerun the batch after fixing any errors.

   > **Note:** You can use the Pipemon utility to help you debug your code.

   See: Creating Batches of Users with Concurrent Programs: page 5 – 20

CHAPTER

6 Configuring Process Flows

Self–Service Workflows

Oracle Self–Service Web Applications utilize the capabilities of Oracle Workflow to manage transaction flows. The Workflows are embedded within SSHR and control the flow of information between the HR professional, the manager, the employee, and the applicant.

See: *Oracle Workflow Guide* (available on Metalink)

SSHR uses workflow processes to combine related functions into a single transaction (for example, to add Special Information Types to Change Assignment or to Personal Information). and to control the transaction flow between the initiating user and other users such as a manager, an HR professional, or an applicant.

You use the Workflow Builder to look at the delivered processes which have been designed to support typical business processes. If necessary, you can configure different versions of the workflow processes to suit your business processes. You link a workflow process to one or more functions using the Form Functions window. When you have linked the workflow process to the function, you can include or hide the function in your user menus.

See: Defining Functions for SSHR: page 5 – 15

This chapter describes how to use the Workflow Builder to review the delivered process flows and to configure alternative flows if desired.

Approvals Processes

You also use the Workflow Builder to configure your approvals processes. For more information, see: Approvals: page 8 – 2

Workflow Objects and Item Types

In Oracle Workflow, all processes are associated with an item type. An item type can include one or more processes and related objects, such as item attributes, functions, and messages. Oracle SSHR delivers a number of predefined workflow item types containing workflow processes that you can work with.

- HRMS Self–Service (HRSSA)
- HR Offer Letter (HR_OFFER) (for SSHR 3.4 only)
- HR Standard (HRSTAND) (for SSHR 3.4 only)

Previous versions of this implementation guide advised customers to make their configuration change to a copy of the delivered item type. Workflow processes that have been implemented using this approach will still be supported, however, for new configurations, you should make your changes to the delivered item type using the approach described below. The new approach utilizes Oracle Workflow's access level features for preserving customizations.

You update the workflow item type in the Workflow Builder.

> **Note:** We recommend that you do not change the item type directly in the database. Instead, download the item type to a .wft file which you then source control. Make the changes to this file and then upload it to the server.
>
> See: Opening and Saving Item Types (*Oracle Workflow Guide Release 2.6.1*)

Workflow Access Levels:

The access protection levels ensure that your customizations are preserved during an upgrade. As long as you set your own access level to 100 or (higher) while working on changes, the access protection ensures that when an upgrade takes place, the "read–only" objects are updated and that customizations made to the "customizable" objects are preserved.

You can change objects if your access level is less than or equal to the object's protection level and greater than or equal to the object's customization level.

> **Note:** If you copy workflow objects and change the access level to 100, the copied objects are displayed without a red tag on the icon. The original objects have a red tag. The absence of the red tag indicates that you can customize the objects.

The following table shows typical settings for workflow objects within the HRSSA item type. The customization level of a customizable object

is set to the user's access level at the time when the user customized the object.

	Most Objects (Default)	Customizable Objects (as delivered)	Customizable Objects (after changes)
Protection level	20	1000	1000
Lock at this level	Yes	No	No
Customization level	20	20	100
Preserve customizations	No	Yes	Yes

See: Overview of Workflow Access Protection (*Oracle Applications Workflow Guide*)

Configuring Workflow Objects

▶ **Before you make changes to workflow objects:**

1. Open WorkFlow Builder.
2. On the File Menu select Help / About Workflow Builder.
3. Ensure that you are using a version of Workflow Builder that is compatible with the version of Oracle Workflow installed on your server.
4. Set the Access Level to 100.

   See: Workflow Objects and Item Types: page 6 – 3
5. Deselect the Allow Modifications of Customized Objects check box.
6. Select and display the Human Resources Self–Service Applications item type. Save it to a local file for backup.

   Note: We recommend that you maintain source control for the .wft files so that you can track changes to the original objects, move definitions to other database instances using the Workflow Loader, and revert to previous versions if necessary.

▶ **To modify delivered workflow objects:**

1. Open WorkFlow Builder.
2. Select and display the Human Resources Self–Service Applications item type.
3. If required, change any configurable item attributes.

   Note: Some item attributes can be customized and other objects, such as processes, notifications, messages, and lookup types, are ”read–only”. You can change the ”customizable” attributes directly in the workflow process. In SSHR item types, the only directly configurable objects are item–level attributes (including enterprise e–mail addresses) and dynamic approval levels.

   See: Defining Your Enterprise’s Email Addresses: page 6 – 9

   See: Configuring Approvals with the Workflow Builder: page 8 – 7
4. If required, create copies of the read–only objects.

   See: Copying Workflow Processes
5. Save your work.

Copying Workflow Processes

▶ **To copy a workflow process:**

1. Copy the object and rename it.

   Note: Prefix your copies with a consistent code, for example, a consistent numeral or a four–letter acronym for the company.

2. You may have to copy multiple levels of the process, for example, to make changes to the Basic Details subprocess within the Personal Information process, you would have to copy the overall process (Personal Information) and the subprocesses (Process Basic Details and Process Personal Information).

3. If you have copied (and modified) a subprocess, you will have to insert your copy of the subprocess into your copy of the higher level process in place of the original subprocess.

4. Save your work.

5. Create at least one function to point to the new process.

   See: Defining Functions for SSHR: page 5 – 15

▶ **After applying a patch**:

During the application of an SSHR patch, the workflow loader utility ensures that your server has the latest versions of any delivered workflow objects. This upload overwrites any ”read–only” objects but preserves any customizations that have been made to ”customizable” objects.

If a patch includes new features or bug fixes for delivered objects that you have copied, you need to apply the same changes to your copied objects. Refer to the patch readme file for instructions. You may have to compare your copied object with the original read–only object.

Configuring Workflow Attribute Values

Workflow attribute values are the values for item types. They are variables that can be set by the application that maintains the item.

You configure workflow attributes in the Workflow Builder.

If you want to modify a predefined process, first make a copy of the process.

See: Self–Service Workflows: page 6 – 2

▶ **To configure workflow attributes:**

1. Open Workflow Builder.
2. If necessary, create a copy of the workflow process you want to modify.
3. Open the Human Resources Self–Service Applications Item Type.

   See: Workflow Objects and Item Types: page 6 – 3
4. Double–click the process you want to modify. This opens the Process window.
5. Double–click an activity in the Process window to open the Control Properties window.
6. Choose the Node Attributes Tab and select a value name. For information on the attributes that are relevant for each process, see the function–specific documentation.
7. Edit any values defined in a procedure in the Value drop down list.
8. Click OK and save your work.

Configuring Workflow Error Processes

Every workflow–enabled function has an error process. The process runs when a system error occurs. The process sends a notification and a description to the System Administrator's ID.

▶ **To configure a workflow error process:**

1. Edit the workflow error process:
   - HR_STANDARD_ERROR_PRC
2. Change the text of the error message by editing the Self–Service HR System Error Message:
   - HR_SYSTEM_ERROR_MSG
3. Save your work.

Defining Your Enterprise's Email Addresses

Email addresses of key people in your enterprise may be displayed n various pages or error messages throughout SSHR.

You set up the email addresses for your enterprise in the Workflow Builder.

▶ **To change email addresses:**

1. Open the Oracle Workflow Builder.
2. Open your configured HRMS Self Service Application item type (HRSSA).
3. Select Attributes.
4. Select the following attribute and enter the appropriate email address in the Default Value field:
   - HR Department E–mail ID

   Note: You configure the Training Administrator ID (if using Enroll in a Class or Cancel Enrollment) and the Recruitment Supervisor ID (if using Candidate Offers) in the Professional Forms Interface.
5. Save your work.

CHAPTER

7 Configuring Page Layouts

The Configuration Framework

The Configuration Framework, a component of the Oracle Applications (OA) Framework technology, enables you to modify many aspects of the appearance and behavior of self–service web pages which are defined in an active data dictionary: the Web Applications Dictionary. The Configuration Framework is a subset of the Web Applications Dictionary functionality and provides a user–friendly interface for making changes to the Web Applications Dictionary definitions where permitted.

See: OA Configuration Framework (available on Metalink)

See: Web Applications Dictionary (*Oracle Self–Service Web Applications Implementation Manual*)

Configuration Framework Hierarchy

The Configuration Framework enables you to configure web pages at different levels: function, localization, site, organization, responsibility, portlet, and user. The lower level configurations, for example, user–level configurations, take precedence over the higher level configurations, for example, site–level configurations.

If you make configurations at the organization or site level, they will affect all users within the organization or site. For example, you may want to include a particular logo in a web page for all users within an organization.

To enable administration–level configurations (configurations at the localization, site, organization, function, and responsibility levels), the system administrator must set the configuration profile options for the user in question. The user then logs on to the self–service application and selects a responsibility. If the profile options have been set correctly, the user will see the Configuration button (may also be called Customization) on the web page. By clicking on this button, the user can customize the page to the level defined by the system administrator.

Typical administration–level configurations include:

- Creating views
- Changing column labels
- Hiding / Displaying columns
- Configuring tables
- Filtering and sorting data

The system administrator decides whether to enable the Configuration Framework at the different levels. For more information, see the *OA Configuration Framework* documentation which is available on Metalink.

Configurable Profile Options

Profile	Configurable Levels	Values	Default
Customize Self–Service Defn (FND_CUSTOM_OA_DEFINITION)	Responsibil-ity, User	Yes / No	No
Disable Self–Service Custom (FND_DISABLE_OA_CUSTOMIZATIONS)	Site, Applica-tion	Yes / No	No

Customize Self–Service Defn

This profile option enables or disables the global Configure (or Customize) URL link that appears on each self–service web application page for Admin–level customizations.

Disable Self–Service Custom

If this system profile option is set to Yes, the configurations you make will not be applied, regardless of the level at which you make the configurations. Only the original definition of each self–service page will be displayed.

Configuring Web Pages

It may sometimes be necessary to modify the predefined web page regions to suit your business requirements. You configure your web pages using the Configuration Framework or, if necessary, the Web Applications Dictionary.

See: OA Customization Framework (available on Metalink)

See: Web Applications Dictionary (available on Metalink)

1. Make sure that you are using a responsibility with administration–level customization access.
2. Navigate to the web page you want to configure.
3. Choose the global Customize button for the web page or the Personalize Region link for a specific region.

   Note: If you want to configure the page at site level, you do not need to enter a customization value. If you are configuring at the responsibility or functional level, you must specify which responsibility or function is affected.

   The Create View page is displayed.
4. Make your configuration changes.
5. If required, you can hide or display flexfield segments.

   See: Configuring Flexfields: page 7 – 5
6. Save your work.

Configuring Flexfields

Flexfields are user–defined data structures which are provided with many of the applications database tables. Key flexfields, for example, the Job Key flexfield are used to uniquely identify a record. Descriptive flexfields, for example, Additional Assignment Details add attributes to an existing object. Each flexfield can consist of multiple flexfield segments, each with its own validation rules.

See: Oracle Applications Flexfields (*Oracle Applied Technology Guide*)

All the segments that you define as Enabled and Displayed are visible to users of the Professional User interface, and by default are visible to SSHR users. However, you may choose to display only a subset of these segments in some SSHR web pages.

> **Note:** Flexfield segments are not displayed in self–service applications until you perform these additional configuration steps.

You modify and add flexfields to regions of your web pages using the Configuration Framework.

▶ **To modify the flexfields displayed in a region:**

1. Select the Region.
2. Configure the region by choosing the Personalize Region.
3. Leave the Flex Segment List field blank if you want to display all the segments in the flexfield. If you only want to display some of the segments, you must manually specify the segments in the Flex Segment List.

   You enter the segments to be displayed as follows:

   context1 | segment1 | segment | | context2 | segment 1

   For example,

   Global Data Element | New Employer | Address | | US | Zip Code
4. Choose Save.

Configuring Tabbed Regions

Tabbed regions appear on several SSHR web pages, for example, the Manager Actions page includes the Employees and Employee Actions tabs. The self–service Benefits functions also use tabbed regions.

The appearance of these tabbed regions is defined by a ”hidden” submenu (See: Self–Service Menus and User Access). To change the appearance of the tabbed regions, you modify the prompts for the functions attached to the hidden submenu.

> **Note:** If you want to modify the tab names, first create a copy of the delivered hidden submenu and modify the copy.

The following submenus contain tabbed regions:

- Employee Enter Process Menu (HR_EMP_ENTERPROCESS_MENU)

  Which contains the following tabbed region:

  - Personal Actions function
- Manager Enter Process Menu (HR_MGR_ENTERPROCESS_MENU)

  Which contains the following tabbed regions:

  - Employees (HR_EMPLOYEES_MENU)
    - Hierarchy
    - My List
    - Search
  - Manager Actions function
- HR Professional V4.0 Menu (HR_PROF_SELF_SERVICE_V4.0)

  Which contains the following tabbed regions:

  - HR Views (HR_VIEWS_MENU)
    - Search function
    - HR Views Submenu (HR_VIEWS)
      - Employee Information View
      - Assignment Information View
      - Compensation Activity View
      - Termination History View
  - Search function
- Benefits Self Service (BEN_SELF_SERVICE_BENEFITS)

  Which contains the following tabbed regions:

- Benefits Enrollments function
- Current Benefits function

See also: Setting Up Self–Service Benefits Web Pages: page 13 – 10

Some tabbed regions include a subset of buttons. For example, the Employees menu includes the Hierarchy, My List, and Search buttons. To remove buttons from display, you either create a new hidden submenu with the required functions (buttons) or you can exclude the functions (buttons) at responsibility level.

> **Note:** If you create a copy of the predelivered submenus and modify the copy, you must replace the link to the predelivered submenu in the Web Applications Dictionary with a link to your custom submenu.

▶ **To rename a tabbed region or button:**

You rename tabbed regions and buttons in the Menus window.

1. Query the submenu.
2. Create a copy of the delivered submenu.
3. Rename the tabbed regions for your copied menu by changing the prompts for the corresponding submenu or function.
4. Save your work.
5. Replace the link to the delivered hidden submenu in the Web Applications Dictionary.

   See: To replace the delivered link to the hidden submenu: page 7 – 8

▶ **To remove a tabbed region or button from display:**

You can use one of the following methods to remove a tabbed region or button from display:

Set a function exclusion at the responsibility level:

1. In the Responsibility window, query the self–service manager responsibility.
2. In the Menu Exclusions tabbed region, create an exclusion with the type Function.
3. Select the function you wish to exclude in the Name column.
4. Save your work.

Create a new submenu with only the required functions (tabbed regions or buttons):

Caution: If you hide the My List function, you should also hide the Search function, and vice versa.

1. In the Menu window, create a new menu.
2. Add to it the required functions, for example, the Tree View and Search functions.
3. Save your work.
4. Query your top–level menu.
5. Add your new submenu to your top–level menu as a hidden submenu.

   Note: Make sure that you delete the Manager Enter Process submenu from your top–level menu.

   See: Defining Menus for SSHR: page 5 – 12
6. Save your work.
7. Replace the link to the delivered submenu in the Web Applications Dictionary using the following procedure.

▶ To replace the delivered link to the hidden submenu

You replace the link in the Region Items window of the Web Applications Dictionary.

1. Query the region that contains the tabbed regions.
2. Choose the Region Items button.
3. Find the region item with the attribute name Application Menu and scroll along until the Menu Name column is displayed.
4. Replace the delivered submenu with your custom submenu.
5. Save your work.
6. Restart the Apache listener.

Adding Instructions to Web Pages

You can change the predefined instructions, messages, and tips attached to your Web pages to provide additional information for your users. You can create the following texts:

- Instructions appear at the top of a region and generally give advice applicable to the whole region or page.
- Long messages are attached to a field. When the user clicks the Information next to a field, the message is displayed in a separate window.
- Short tips are also attached to a field, however, they are displayed underneath the field in blue.

You create texts in the Messages window and add them to your region in the Configuration Framework.

> **Note:** You can only change a text for a region that already contains an instruction, message, or tip. You cannot add a message to a region that is delivered without a message.

▶ **To create a new message text:**

1. Log on to the database using an Application Developer responsibility.
2. Navigate to the Messages window.
3. Enter the name for your message.
4. Select Note as the message type.
5. Enter the application and the message text.
6. Save your work.

▶ **To add a text to a region:**

1. Log on to a self–service application using a responsibility that allows configuration.

   Note: To enable configuration, the Customize Self–Service profile option (FND_CUSTOM_OA_DEFINITION) must be set to Yes at the responsibility level.
2. Navigate to the self–service page for which you want to change the text.
3. Choose the Personalize Region button for the region.
4. Choose the Advanced Settings button.

5. In the Tip Message Name column for the corresponding region, search for your new instruction, message, or tip.
6. If you are adding an instruction, leave the Tip Type field blank. Otherwise, select either Long Message or Short Tip.
7. Save your work.

Configuring the Global Button Bar

The Global Button Bar comprises the following buttons by default:

- Return to Portal
- Log Off
- Select Preferences
- Email
- Self–Service Help

Selecting a button enables a user to access the button's function.

You can configure the Global Button bar by removing any, or all, of the buttons from a user's web page. You edit the contents of the Global Button bar in the Menus window. When you remove a button from display a user can no longer access the button's functionality. You can also rearrange the order of the buttons or use a button bar that you create.

▶ **To configure a button on the global button bar:**

1. Query the following Menu in the Menus window:
   - ICX_GLOBAL_MENU
2. Consider which of the following functions you want your users to access with the Global Button Bar:
   - Return to Portal
   - Log Off
   - Select Preferences
   - Email
   - Self–Service Help
3. Delete the functions you don't want users to access.
4. Save your work.

   See: User's Menu *(Oracle Applications System Administrator's Guide)*

▶ **To remove the global button bar display:**

1. Navigate to the web page you want to configure.
2. Choose Customize.
3. Hide the Global Button bar.

   See: OA Customization Framework (available on Metalink)

Replacing the Default Oracle Logo

You can replace the default Oracle logo, which appears in the upper left corner of the Web pages, with your own logo. You can do this in one of two ways, you can overwrite the default logo with a logo of the same name or you can replace the default logo with one of your own.

▶ **To overwrite the default logo with your own logo:**

1. Create a logo.
2. Save and name the logo:
   - FNDSSCORP.gif
3. Place the gif in the $OA_MEDIA / <Language> directory.

   Note: If you have a multilingual install, you must also copy this file to the other language locations.

▶ **To replace the default logo with your own logo:**

1. Create a .gif logo.
2. Place the gif in the $OA_MEDIA / <Language> directory.

   Note: If you have a multilingual install, you must also copy this file to the other language locations.
3. Query each of the Web Page Regions.
4. Overwrite the Image File Name column entry with the name of your Logo.
5. Save your work.

   See: Web Application Dictionary (*Oracle Self–Service Web Applications Implementation Manual, Release 11*)

CHAPTER

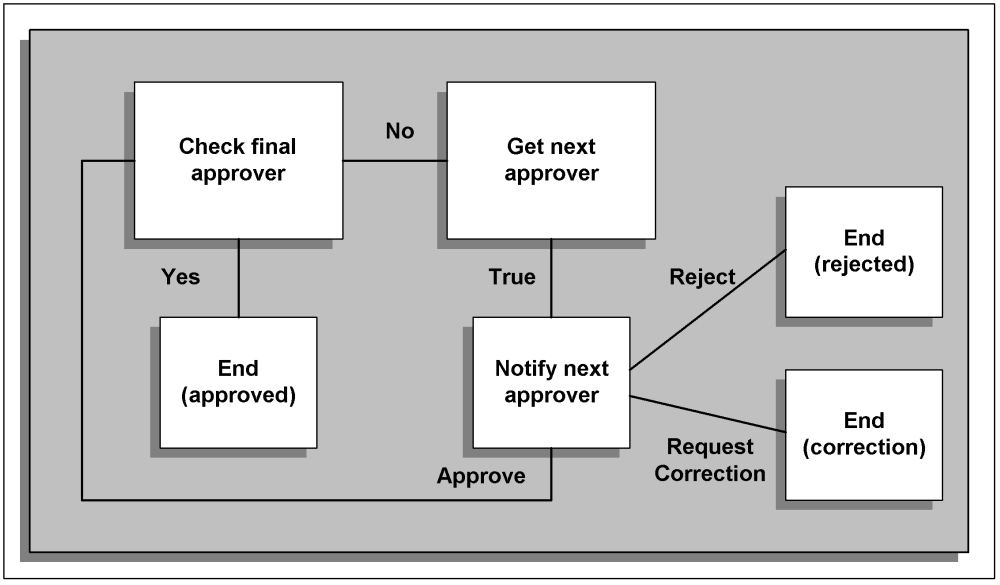
8 Approvals

Overview of Approvals

The Approvals process enables you to decide whether transactions carried out by SSHR users need approval before they are submitted to the HR tables. You can define different approval requirements for different transactions and vary the approval requirements by responsibility. For example, you can configure the workflow processes so that the Address part of Personal Information requires approval but the Phone Numbers part does not. Alternatively, you can vary the Approvals requirements by responsibility so that records changed by employees would need approval but records changed by managers would not.

If you enable Approvals for a transaction, the transaction enters the following approvals loop:

Figure 8 – 1 The Basic Approvals Loop



The PL/SQL code behind the approvals logic checks whether the current approver is the final approver. You define the number of approvers using the Approval Level attribute in the Workflow Builder.

If the current approver is not the final approver, the PL/SQL code fetches the user ID for the next approver who then receives an approvals notification.

The next approver can either reject the transaction, approve the transaction, or return the transaction for correction (see: Approvals with Correction V4.0).

You can configure approvals in one or more of the following ways to ensure that it meets the requirements of your enterprise. You can:

- Limit the number of approvals levels (configure in Workflow Builder)
- Stop the approvals at a specific grade level (configure using PL / SQL)
- Route the approval to a manager then to an administrator (configure in Workflow Builder and PL / SQL)
- Use the position hierarchy (configure in PL / SQL)

Approvals with Correction V4.0

Approvals with Corrections V4.0 is the standard approvals module for SSHR 4.0. It is an enhanced version of the SSHR 3.x Dynamic Approvals process.

The Approvals module enables users to add additional approvers and / or notification recipients to participate in the approval process of any Oracle SSHR transaction. You can also display the approvers and limit the number of approval levels.

The approvals functionality works in two parts. One part is the self–service user interface which enables the initiating manager to add additional approvers and / or notification recipients. The second part is the workflow approval process which generates the default approvers. The dynamic approval workflow process also sends notifications to approvers and / or notification recipients based on the data entered by the users.

To use the user interface functionality, the system administrator needs to enable dynamic approvals for the workflow process in question. To do this, the system administrator sets the activity attribute in the Review activity.

See: Configuring Approvals: page 8 – 7

See: Review and Confirm: page 9 – 14

User Interface for Approvals

The self–service user interface for dynamic approvals has two sections: the Approvals and Notification Recipient sections. The SSHR user can see the path of the transaction by displaying all default approvers who will participate in the approval process (the list of approvers is driven by the get_next_approver logic). The manager initiating the SSHR

transaction can add additional approvers to the approval chain and nominate additional notification recipients. The notifications would then be sent to these persons on submission and / or on approval.

The system administrator can disable the insert approvers / add notification recipients functionality if required.

Workflow Approvals Process

The workflow approvals process uses the user hook package, `hr_approval_custom`, to generate the default approvers.

In addition to enabling the dynamic approvals, the system administrator can also set the number of levels in the approvals hierarchy. You can set the approvals levels locally (for the specific workflow process) or at the workflow item level. If you set the levels at the item level, all processes within the item type have the same approval levels. Although the system allows you to set the number of levels at both process level and item level, the process level has priority over the item level.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Approvals Process with Correction V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Definitions for Web Applications Dictionary:

The following definitions can be configured in the Web Applications Dictionary:

Regions

Dynamic Approvals Page

Region Code	Region Name
HR_DYNAMIC_APPROVALS_TOP_SS	Dynamic Approval
HR_DYNAMIC_APPROVERS_LIST2_SS	Dynamic Approvers List2

Region Code	Region Name
HR_DYNAMIC_APPROVERS_LOV_SS	Approvers
HR_DYNAMIC_APPROVERS_SS	Dynamic Approvers Header
HR_DYNAMIC_APPROVE_CONTROLS_SS	Dynamic Approver Controls
HR_DYNAMIC_APPROVE_NOTIFY_SS	Dynamic Approvals and Notifications
HR_DYNAMIC_BUTTONS_SS	Dynamic OK Cancel Buttons

Dynamic Approvals Notifications Page

Region Code	Region Name
HR_DYNAMIC_NOTIFICATIONS_SS	Dynamic Notifications Header
HR_DYNAMIC_NOTIFIERS_LOV_SS	Notifications
HR_DYNAMIC_NOTIFY_CONTROLS	Dynamic Notification Controls
HR_DYNAMIC_NOTIFY_LIST_SS	Dynamic Notifications List

Dynamic Approvals Review Page

Region Code	Region Name
HR_REVIEW_DYNAMIC_APPROVAL_SS	Dynamic Approval

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

See; Review and Confirm: page 9 – 14

Additional Configuration Steps:

1. You can configure the approvals processes using the Workflow Builder.

See: Configuring Approvals with the Workflow Builder: page 8 – 7

2. You can modify the approvals logic in the HR_APPROVAL_CUSTOM package.

   See: Customizing Approvals Using PL/SQL: page 8 – 8

Configuring Approvals in the Workflow Builder

If required, you can configure the predefined approvals processes in the Workflow Builder. You set up the approvals process using workflow attributes.

▶ **To configure approvals in the Workflow Builder:**

1. Open the workflow item type.
2. Navigate to the process you want to modify and double click to open the workflow diagram.
3. Open the Review Page V4.0 activity for your workflow process.

   Note: You may have to drill down through several subprocesses until you reach the correct Review Page V4.0 activity.
4. Make a copy of the process and any affected subprocesses. For example, if you are modifying the approvals for the Process Personal Information V4.0 process, you would have to copy the Process Personal Information V4.0 process, and the related subprocesses, for example, the Process Basic Details subprocess.

   See: Updating Workflow Objects: page 6 – 3
5. Select the Review Page V4.0 activity for your process / subprocess and set the Approval Required workflow attribute (HR_APPROVAL_REQ_FLAG) to YES. This activates approval for your process / subprocess.

   Note: The default value varies for different modules.

   See: Review and Confirm: page 9 – 14
6. Decide how a process should pass through the entire approval chain, in other words, how many levels of approval are required. Set the approval level using the Approval Level attribute (HR_DYNAMIC_APPROVAL_LEVEL). Add an approval level value to the Default Value field. A value of 1 for example will pass the approval one level up the supervisor chain.

   Note: The default number of level is 0, meaning that the number of levels is unlimited.
7. Save your work.

Customizing Approvals Using PL/SQL

If necessary, you can review the logic in the check_final_approver and get_next_approver functions and modify them as required. These functions are within the HR_APPROVAL_CUSTOM package.

Make sure that your returned values are of the correct data type.

The following code shows the logic for the approval functions. If required, you can customize the code to use different approvals routings or to stop at a different grade level.

```
  --       -Check_final_approver
function check_final_approver
          (p_forward_to_person_id in per_people_f.person_id%type
          ,p_person_id            in per_people_f.person_id%type)
         return varchar2 is
--
  cursor csr_pa(l_effective_date in date) is
    select  paf.person_id
    from    per_all_assignments_f paf
    start   with paf.person_id = p_person_id
      and     paf.primary_flag = 'Y'
      and     l_effective_date
      between paf.effective_start_date
      and     paf.effective_end_date
    connect by prior paf.supervisor_id = paf.person_id
      and     paf.primary_flag = 'Y'
      and     l_effective_date
      between paf.effective_start_date
      and     paf.effective_end_date;
--
  l_person_id per_people_f.person_id%type := null;
--
begin
  -- loop through each row. the rows are returned in an order which makes
  -- the last row selected the top most node of the chain.
  for csr in csr_pa(trunc(sysdate)) loop
    -- set the l_person_id variable to the row fetched
    l_person_id := csr.person_id;
  end loop;
  if p_forward_to_person_id = l_person_id then
    return('Y');
  else
    return('N');
  end if;
exception
  when others then
       return('E');
--
```

```
end check_final_approver;
()
```

- **-Get_next_approver**

```
function get_next_approver
           (p_person_id in per_people_f.person_id%type)
         return per_people_f.person_id%type is
--
  cursor csr_pa(l_effective_date in date
               ,l_in_person_id   in per_people_f.person_id%type) is
    select  ppf.person_id
    from    per_all_assignments_f paf
           ,per_people_f      ppf
    where   paf.person_id             = l_in_person_id
    and     paf.primary_flag          = 'Y'
    and     l_effective_date
    between paf.effective_start_date
    and     paf.effective_end_date
    and     ppf.person_id             = paf.supervisor_id
    and     ppf.current_employee_flag = 'Y'
    and     l_effective_date
    between ppf.effective_start_date
    and     ppf.effective_end_date;
--
  l_out_person_id per_people_f.person_id%type default null;
--
begin
  -- [CUSTOMIZE]
  -- open the candidate select cursor
  open csr_pa(trunc(sysdate), p_person_id);
  -- fetch the candidate details
  fetch csr_pa into l_out_person_id;
  if csr_pa%notfound then
    -- if the cursor does not return a row then we must set the out
    -- parameter to null
    l_out_person_id := null;
  end if;
  -- close the cursor
  close csr_pa;
  return(l_out_person_id);
end get_next_approver;
()
```

CHAPTER

9 Common SSHR Functions

Overview of Common SSHR Modules

This chapter contains information on how to configure modules that provide common, low–level functionality used in many of the higher–level functions described in later chapters.

The common modules are:

- Person Tree
- Actions Page
- Release Employee Information
- Review and Confirm
- New User Registration

Person Tree

The Person Tree, or hierarchy, is the starting point for all manager self–service functions. It enables managers to select an employee record for processing in SSHR.

The Person Tree page consists of the Followign nested components which are explained in detail below:

- Employees region
  - Hierarchy nested region
  - My List nested region
  - Search nested region
- Employee Actions region

The format of the Person Tree page depends on the navigation path that the manager has taken. There are two possible paths:

- From the generic Manager Actions V4.0 menu

  In this case, the manager first selects the person from the person tree and then selects the SSHR module. The modules, or actions, for the selected person are displayed in a context–sensitive list.

  You set the parameter pDestination to HR_ACTIONS_SS (instead of setting it to a specific function) to ensure that the page includes all actions.

- From a specific manager self–service menu item

  In this case, the manager selects a specific module and then selects the person for processing. When the manager selects a person from the Person Tree, they are taken directly to the module specified by the function name passed in the pCalledFrom parameter for the manager function.

  See: Navigation Paths: page 5 – 5

  See:Defining Functions for SSHR: page 5 – 15

The Person Tree page consists of several tabbed regions which are defined by the Manager Enter Process hidden submenu (HR_MGR_ENTERPROCESS_MENU). The submenu currently contains the following tabbed regions:

- Employees
- Employee Actions

  Note: You must attach the Manager Enter Process submenu to the top–level menus for all manager responsibilities.

  See: Menus for Managers: page 5 – 11

Employees Tab

You define which regions appear on the Employees tab by modifying the Employees Menu hidden submenu (HR_EMPLOYEES_MENU). The Employees tab currently includes the following regions:

- Person Tree, or hierarchy
- My List
- Person Search

Note: You must attach the Employees Menu hidden submenu to the top–level menus for all manager responsibilities.

If required, you can hide the My List and Search tabs from responsibilities using function exclusions.

See: Menus for Managers: page 5 – 11

Employee Actions Tab

The Employee Actions tab is displayed when a manager either chooses the Manager Actions V4.0 function and selects a person or chooses a function and then selects a person. The contents of the Employee Actions tab is defined by the navigation path taken by the user.

If a manager has displayed the Person Tree before choosing a specific function (by choosing the Manager Actions V4.0 function), the Employee Actions tab displays a context–sensitive list of the functions available for the selected employee. The list is driven by the hidden submenu defined for the HR:Manager Actions Menu profile option. The default menu for this profile option is the predefined Personal Actions Menu (HR_LINE_MANAGER_PERS_FUNCTIONS).

If a manager does not select a person in the Person Tree, the selection defaults to the manager's own employee record. In this case, the list displayed is driven by the hidden submenu for the HR:Personal Actions Menu profile option. The default menu for this profile option is the predefined Manager Actions Menu (HR_LINE_MANAGER_FUNCTIONS).

The list of functions displayed in the Employee Actions tab is also defined by the person's legislation code.

See: Data Security Menus: page 5 – 10

If the manager selects a specific function first and then selects a person from the Person Tree, the Employee Actions tab only displays the preselected function. If the functions is not available, for example, if legislation restrictions apply, an error message is displayed.

See: Actions Page: page 9 – 8

Menu and Function Names

User Menu Name	Function Name
Manager Self Service V4.0	Manager Actions Tree View V4.0 and all manager functions

See: Defining User Access and Menus: page 5 – 12

Workflow

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured using the Configuration Framework:

Regions

Person Tree

Region Code	Region Name
HR_PERSON_TREE_TOP_SS	Hierarchy
HR_PERSON_TREE_CONTAINER_SS	Person Tree Container
HR_PERSON_TREE_POPLIST_SS	Views Tree Poplist
HR_PERSON_TREE_SS	Person Tree

My List

Region Code	Region Name
HR_MY_LIST_TOP_SS	My List
HR_MY_LIST_HEADER_SS	Enter Person My List Header
HR_MY_LIST_RESULTS_SS	Enter Person My List Results

People Search Page

Region Code	Region Name
HR_PERSON_SEARCH_CONTAINER_SS	Person Search Container
HR_SEARCH_CRITERIA_BAS_SS	Basic Person Search Criteria

Region Code	Region Name
HR_SEARCH_CRITERIA_ADV_SS	Advanced Search Criteria
HR_PERSON_LIST_SS	Person List

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Hierarchy Page

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_PERSON_TREE_CONTAINER_SS	Person Tree Container	HR Instruction		HR_INST_HIERARCHY_TREE

My List

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_MY_LIST_HEADER_SS	Enter Person My List Header	HrInstruction		HR_INST_MY_LIST
HR_MY_LIST_HEADER_SS	Enter Person My List Header	HRInstruction1		HR_INST_MY_LIST_SEARCH

Search Page

Region ID	Region Name	Attribute Name	Tip Type	Message Name
				HR_INST_PERSON_SEARCH
HR_PERSON_SEARCH_SWITCH_SS	Person Search Switch	HrInstruction		HR_INST_PERSON_SEARCH_BASIC
HR_PERSON_SEARCH_SWITCH_SS	Person Search Switch	HrInstruction1		HR_INST_PERSON_SEARCH_ADVANCED

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Cross Business Group	All	Yes / No	Yes

See: User Profiles (*Oracle HRMS Applications User Guide*)

Additional Configuration Steps

My List Page

1. To configure the range of dates that users can see, change the values of the lookup type HR_HIRE_DATE.

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

Search Page

1. To prevent your users from using the Basic or Advanced Search, hide the corresponding region in the Configuration Framework.
2. You can configure the search criteria for the Basic and Advanced Searches. You can rearrange the sequence of the criteria and, if necessary, delete search criteria.

   See: Configuring Web Pages: page 7 – 4

Actions Page

The Actions page displays a context–sensitive list of actions that can be performed for a selected person and suspended actions. Suspended actions can include actions that a user has saved for later submission or actions that have been returned to the initiator by an approver, for example, to be corrected.

See: Navigation Paths: page 5 – 5

The Actions page can be accessed in one of the following ways:

- Managers can select an employee using one of the employee selection methods and then choose the Actions tab to display the actions relevant to the employee
- Managers can select the Actions tab from the Hierarchy page and display their own personal actions
- Employees can select the Personal Actions menu option from the Employee menu and display their personal actions

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Manager Actions V4.0
Employee Self Service V4.0	Personal Actions V4.0
Manager Self Service V4.0	Suspended Actions Mgr V4.0
Employee Self Service V4.0	Suspended Actions V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Personal Actions Page

Region Code	Region Name
HR_PERSONAL_PROCESS_TOP_SS	Personal Process
HR_PROCESS_PEOPLE_SS	SSHR Process People

Manager Actions Page

Region Code	Region Name
HR_PROCESS_PEOPLE_TOP_SS	SSHR Process People
HR_PROCESS_PEOPLE_SS	Review Region

Actions Saved for Later Page

Region Code	Region Name
HR_PROCESS_MY_SUSPENDS_TOP_SS	SSHR Process My Suspended Actions
HR_PROCESS_MY_SUS_EDA_TOP_SS	SSHR Process My Suspended Actions EDA

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_PROCESS_PEOPLE_SS	SSHR Process People	HR Instruction		HR_INST_ACTIONS
HR_PROCESS_SEL_ACT_SS	SSHR Process Selected Action Region	HR Instruction		HR_INST_ACTIONS_SINGLE
HR_PROCESS_LIST_SS	SSHR Process List	HR Instruction		HR_INST_ACTIONS_DUAL
HR_PROCESS_LIST_SS	SSHR Process List	HR Instruction2		HR_INST_ACTIONS_SHOW

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Manager Actions Menu	All	All Manager Actions menus	Manager Actions Menu
HR:Personal Actions Menu	All	All Personal Actions menus	Personal Actions Menu
HR: Actions – Validation	All	All Actions Checked, Preselected Action Checked, All Validation Post Selection	All Actions Checked

See: User Profiles (*Oracle HRMS Applications User Guide*)

Release Employee Information

The Release Employee Information function enables an employee to share information about themselves with another employee, often a manager, who would not usually have access to their records. Similarly, a manager can use this function to share information about one of their employees with a second manager.

See: Security Profiles (*Oracle HRMS Applications User Guide*)

The Release Employee Information function is available under predefined Manager and Employee responsibilities. Configuration options enable you to set up approvals processes for granting access.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service 4.0	Release Employee Information Mgr 4.0
Employee Self Service V4.0	Release Employee Information 4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Release Employee Information V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Release Employee Information – Update Page

Region Code	Region Name
HR_CAED_TOP_SS	CAED Top Page
HR_CAED_SS	CAED Control Access to Employee Data

Release Employee Information – Review Page

Region Code	Region Name
HR_CAED_REVIEW_SS	CAED

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_CAED_EMP_SEARCH	CAED: Grant Access To	HR Instruction	Long Message	HR_INST_CAED_GRANT_ACCESS
HR_CAED_GRANTED_TABLE_HEADER	CAED Granted Employee Header Region	HR Instruction 1	Long Message	HR_INST_CAED_EXISTING_GRANTS
HR_CAED_PENDING_TABLE_HEADER	CAED Pending Employee Header Region	HR Instruction 2	Long Message	HR_INST_CAED_PENDING_GRANTS

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Profile	Configurable Levels	Values	Default
HR:CROSS_BUSINESS_GROUP	Site	Yes / No	No

The Cross Business Group profile option determines whether employees from other business groups are retrieved in the employee search.

See: User Profiles (*Oracle HRMS Applications User Guide*)

Additional Configuration Steps

1. Configure the predefined user menus to include the Release Employee Information function.

   See: Defining User Access and Menus: page 5 – 12

2. If you want your managers to have access to employee data, ensure that the Allow Granted Access check box is flagged for the security profile assigned to the manager. This enables the manager to review the employee's data.

   See: Security Profiles (*Oracle HRMS Applications User Guide*)

Review and Confirm

Most functions display the Review and Confirm pages. The Review page displays a corresponding region for each Web page section that you have updated as part of the preceding transaction. Inside each region is a list of current database and proposed transaction data. If you have configured approvals, you can enter approvals comments in this page. If you have enabled the Dynamic Approvals function, the user can see the default approval chain and add further approvers and notifiers.

When the user chooses the Submit button from the Review page, the transaction is committed to the Human Resources system or sent for approval. The Confirm page is then displayed. The Confirm page contains a confirmation message describing the status of the transaction. The user can print a copy of the submitted transaction for their records if required.

You can set up the approval properties for a process by changing the activity level attributes for the Review workflow functions.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Common functionality which is used by all processes.

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
	Review Page V4.0	HR_DYNAMIC_APPROVAL_LEVEL
	Review Page V4.0	HR_APPROVAL_REQUIRED_FLAG
	Review Page V4.0	Confirm Instruction Application Short Name
	Review Page V4.0	Confirm Save Instruction Name
	Review Page V4.0	Confirm Send for Approval Instruction Name

HR_DYNAMIC_APPROVAL_LEVEL:

This attribute is used to specify the number of levels to which this transaction needs to be forwarded for approval in the approval hierarchy. For example, if the value is 1, the transaction is submitted for approval to one level higher than the initiating person. When the transaction has been approved, it is committed to the HRMS application. By default, this attribute reads the approval level from the APPROVAL_LEVEL (Approval Level) item level attribute. If you specify a value for the item level attribute, you can control the approval level for all the processes. If you specify a value for the HR_DYNAMIC_APPROVAL_LEVEL attribute, it overrides the item level attribute for the process for which you have specified the value.

HR_APPROVAL_REQUIRED_FLAG:

This attribute is used to specify whether the current transaction requires an approval. The valid values are:

- No: the process does not require approval
- Yes: the process requires approval but the dynamic approval user interface will not be shown in the review page. This means that the initiator cannot add additional approvers or notifiers.
- Yes – Dynamic Approval: the process requires approval and the dynamic approval user interface will be shown in the review page. The initiator can add additional approvers and notifiers.

Confirm Instruction Application Short Name:

In addition to the standard confirmation message shown in the confirmation page, you can also configure messages that are specific to the process. You can specify one for a scenario for which approval is required and one for a scenario for which no approval is required. Processes can be set to either Approval Required or Approval Not Required, but not both, using the HR_APPROVAL_REQUIRED_FLAG. For example, you can define a message for Confirm Save Instruction Name and Confirm Send for Approval Instruction Name. You register this message under your custom application.

Confirm Send for Approval Instruction Name:

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process does not require approval.

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation

message. This text is only displayed when the process requires approval.

> **Note:** You must copy the delivered processes and make changes to the copy. If you make changes to the delivered processes, they will be overwritten when new patches are applied to your system.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Review Page

Region Code	Region Name
HR_REVIEW_TOP_SS	Review
HR_REVIEW_SS	Review Region

Confirm Page

Region Code	Region Name
HR_CONFIRM_TOP_SS	Confirmation
HR_REVIEW_SS	Review Region

> **Note:** All the review regions associated to different transactions are added as nested regions under HR_REVIEW_SS. Make sure that you synchronize your update page review section definition to the corresponding review section. For example, if you change a label, change a flex segment list, or hide / show region items in the update page, you need to do the same in the corresponding review section.

Nested Regions for the Review Module

Module Name	Review Region	Region Item Name
Assignment Other Employment Information	HR_OTHER-EMP_INFO_REVIEW_SS	HrOtherEmpInfo
Assignment	HR_ASSIGNMENT_REVIEW_SS	HrAssignment

Module Name	Review Region	Region Item Name
Personal Information Basic Details	HR_BASIC_DETAIL_REVIEW_SS	HrBasicDetailsReview
Personal Information Phone Number	HR_PHONE_NUMBERS_REVIEW_SS	HrPhoneNumbersReview
Change Manager	HR_MANAGER_REVIEW_SS	HrManager
Pay Rate	HR_P_RATE_REVIEW_SS	HrPayRate
Termination	HR_TERMINATION_REVIEW_SS	HrTermination
Personal Information Main Address	HR_MAIN_ADDRESS_REVIEW_SS	HrMainAddressReview
Personal Information Secondary Address	HR_SECOND_ADDRESS_REVIEW_SS	HrSecondaryAddressReview
Tertiary Address	HR_TERTIARY_ADDRESS_REVIEW_SS	HrTertiaryAddressReview
Location	HR_CHANGE_LOCATION_REVIEW_SS	HrChangeLocation
Work Schedule	HR_WORK_SCHED_REVIEW_SS	HrWorkSchedule
Education and Qualifications	HR_QUALIFICATIONS_REVIEW_SS	HrQualification
Awards	HR_AWARDS_REVIEW_SS	HrAward
Tenure Status	PQH_TENURE_STATUS_REVIEW	PqhTenureStatusReview
Academic Rank	PQH_ACADEMIC_RANK_REVIEW	PqhAcademicRankReview
Release Employee Information	HR_CAED_REVIEW_SS	HrCAED
Benefits	BEN_COMP_REVIEW_CONTENT_SS	BenCompensation
Contacts Delete	HR_CONTACT_DELETE_REVIEW_SS	HrContactsDelReview
Contacts	HR_CONTACTS_REVIEW_CONTENT_SS	HrContacts
Competence Profile	HR_COMP_REVIEW_SS	HrCompetence

Module Name	Review Region	Region Item Name
Payroll Payment Methods	PAY_PAYMENTS_RE-VIEW_SS	PayPayments
Work Preferences	HR_WP_REVIEW_SS	HrWorkPreferenceReview
W4 Tax Information	PAY_W4_RE-VIEW_SS_HEADER	PayW4ReviewSsHeader
Special Information Types	HR_PERSON_SIT_RE-VIEW_SS	HrSIT

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

New User Registration

Self–service registration for new users helps to reduce the workload and costs of HR administration. HR professionals can use this feature to add new employees to the Oracle HRMS database. The self–service approach reduces the rollout effort for large companies where the HR department is not centrally located. You can add or edit user–friendly tips and text messages in the user interface to reduce the need for end user training.

You can also use self–service registration to help shift the workload from the HR department onto the hiring line manager or even the individual employees by allowing them to register their own employee details.

Using the **New Employee Registration** function, employees log on with a generic company user name and supplied password or they access the function directly with a "guest login", which is invisible to users. They complete online registration, giving details such as name, address, employment details, and family members. They can create their own self–service user names and passwords (or you can choose to generate these automatically). Alternatively, HR administrators or line managers can create the employee records and self–service user names for their new hires.

Using the **Non–employee Registration** function, other people can log on to create non–employee records in Oracle HRMS. This is most commonly used by US third party benefits providers using Oracle Advanced Benefits. It enables benefits participants or their dependents who become COBRA qualified due to a life event (such as divorce or termination) to register so they can elect their COBRA coverage through self–service.

Using the **Create User Name** function, people who already have an HR record in the database can create their own self–service user names and passwords. This function provides an alternative to the existing methods of creating users, which are using the Users window or creating self–service users in a batch.

Benefits Registration

If you have implemented Standard Benefits or Oracle Advanced Benefits, benefits participants can register directly with you through the World Wide Web or over a corporate intranet. If you are a third party benefits administrator or provider, this means that employees' HR departments are no longer responsible for transferring HR information to your database.

Once a person completes the registration, they can navigate directly to the Self–Service Benefits functions, which process detected life events that enable benefits elections or unrestricted program elections.

Generic Users and Responsibilities

You give a generic user name and password to people, enabling them to access self–service initially to register. You can choose how many generic user names you create. For example, a third party benefits provider is likely to create one generic user name for each subscriber organization. Employers might create one user name for the entire business group, or different names based on the organization hierarchy structure.

Default Organization

Each user name is associated with an organization using the profile option OAB:User to Organization Link. This defaults the organization for a new employee assignment, but the user can select another organization from the business group during registration. You can set this profile option at the responsibility level—to link each generic user name with a separate organization—or at the site, or application levels.

Default Payroll

Similarly, for each generic user name you can select the default payroll to be assigned, by setting the profile option OAB:User to Payroll Link at the responsibility level. You can also set this profile option at the site, or application levels.

Default Responsibility

By default, all newly registered users are assigned the seeded Self Registered Employee Default responsibility. This responsibility gives them access to a subset of self–service functions, such as Self–Service Benefits enrollment, person name, address, and contact information. You can create your own responsibilities and assign them to responsibilities, or the whole site by setting the OAB: Self Registered User Responsibility profile option at the appropriate level.

Setting Up a Generic User ID For New User Registration

Follow these steps to create the generic user name and password that will enable new employees, managers, and other users to access self–service to register themselves in your database. These steps are required if you are using any of the following processes:

- New Employee Registration
- Non–employee Registration
- Create User Name

If you are implementing new user registration in more than one business group, see: Setting Up Generic User IDs in Multiple Business Groups: page 9 – 24. If you are implementing new user registration within a single business group, use the following procedure.

If you are *only* implementing the Create User Name process (that is, you are using self–service to create new users but not to create HRMS records), you can omit steps 7 and 8.

▶ **To set up self–service registration in a single business group:**

1. If you are a third party benefits provider, create an organization to represent each subscriber organization or company in which you are providing benefits.

   If you are not a third party benefits provider, you create your HR organization hierarchy as required within your business group. Skip the next step since it applies to third parties who administer multiple companies within a single business group.

   See: Creating an Organization, *Using Oracle HRMS – The Fundamentals*

   See: Adapting and Creating a New Business Group, *Using Oracle HRMS – The Fundamentals*

2. **Third party benefits providers using Oracle Advanced Benefits only:** Establish a link between your organizations and the relevant benefits program. For example, link each subscriber organization to the subscriber's benefit program. Use the Organizations tabbed region of the Programs window.

   This link enables the Participation process to select the appropriate benefit programs for a particular organization when processing people within that organization. This enhances system performance by limiting the retrieval of records to the person's organization. The process selects the programs pertaining to that organization and then examines the person's eligibility restrictions.

Note: Set the system profile *Limit By Persons Organization* to Yes to enable this feature for the Benefit Service Center window. Set the *Limit to Organization* parameter to limit the Participation batch process.

See: Defining a Benefits Program, *Managing Total Compensation Using Oracle HRMS*

See: Associating an Organization with a Benefits Program, *Managing Total Compensation Using Oracle HRMS*

3. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non–employee Registration and Create User Name functions in self–service.

   If you only need one generic user name for the business group, you can use the predefined New User Registration responsibility.

   Otherwise, create a copy of the New User Registration responsibility for each organization for which you will create a separate generic user name. You might want more than one responsibility for each organization. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self–service user name and password. This would reduce errors by giving each person access to one function only.

4. Create a generic user name and password for the business group or for each organization, so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process: page 9 – 32.

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

5. Add the New User Registration responsibility (or the responsibilities you created in step 3) to the generic user name for each organization.

6. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

7. Update the *OAB:User to Organization Link* system profile at the responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

Attention: Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

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

8. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

Attention: Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

9. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations. If it is not, create any new self–service responsibilities you require.

   Note: The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self–service web pages after the initial registration.

10. If you created just one new responsibility in the previous step, change the profile *OAB: Self Registered User Responsibility* at the site level to point to your new responsibility. If you created a different responsibility for each organization, add it to the profile *OAB: Self Registered User Responsibility* at the responsibility level for the New User Registration responsibility (or your copies).

    Note: Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level. The self–service menu for this seeded responsibility gives access to only a subset of employee self–service transactions.

11. Log into Self–Service with the user name and password you created.

    As the system administrator, the first time you log into self–service, you gain access by using the password you created in step 4. After entering it, you must change the password to a generic password you want the new people to use when accessing self–service initially to register.

12. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step 10) to the new user name.

Setting Up Generic User IDs in Multiple Business Groups

This procedure is appropriate for third party benefit providers who are creating a separate business group for each company or subscriber organization. It is also appropriate for employers or third party administrators who have multiple business groups on a single database.

▶ **To set up self–service registration in multiple business groups:**

1. Third party benefits providers: Create a business group to represent each subscriber organization or company in which you are providing benefits. In each business group, create an HR organization for the subscriber.

   Employers: Decide how many generic user names you want to create. You will need at least one generic user name for each business group. You may want to create separate user names for the organizational hierarchies within each business group.

   See: Creating an Organization, *Using Oracle HRMS – The Fundamentals*

   See: Adapting and Creating a New Business Group, *Using Oracle HRMS – The Fundamentals*

2. Review the predefined New User Registration responsibility and New User Registration menu, which gives access to the New Employee Registration, Non–employee Registration and Create User Name functions in self–service.

   Create a copy of the New User Registration responsibility for each business group. You might want more than one responsibility for each business group. For example, you might give new employees a responsibility that gives them access to the New Employee Registration function only. You could create a second responsibility for people who already exist in the database but need to create a self–service user name and password. This would reduce errors by giving each person access to one function only.

3. Create a generic user name and password for each organization so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process: page 9 – 32.

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

4. Add your copy of the New User Registration responsibility to the generic user name for each organization.

5. Update the system profile HR:Business Group at the appropriate level so that the generic user name points to the business group in which the person registering belongs.

6. Update the *OAB:User to Organization Link* system profile at the user or responsibility level to link the New User Registration responsibility (or your copies) to the organization in which the person belongs.

Attention: Check to ensure that the organization you select is correct. The list of values contains all the organizations in the database. You must select an organization defined in the business group associated with the user name.

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

7. Update the profile *OAB User to Payroll Link* at the responsibility level for the New User Registration responsibility (or your copies) to provide a default employee payroll. If this profile is blank and the employee is not assigned to a payroll, OAB processes use the benefits default payroll selected for the business group in which the person will be registered.

Attention: Check to ensure that the payroll you select is correct. The list of values contains all the payrolls in the database. You must select a payroll defined in the business group associated with the user name.

8. Check whether the predefined Self Registered Employee Default responsibility is appropriate for all your organizations.

   - If it is not, create any new self–service responsibilities you require.
   - If it is, create a copy for each organization.

   Update the system profile *HR:Business Group* at the responsibility level to point to the correct business group.

   Note: The application assigns this responsibility to users when they complete their registration. This responsibility contains the New Employee Default Menu that the participant uses to access the self–service web pages after the initial registration.

9. Update the system profile *OAB: Self Registered User Responsibility* at the responsibility level with the name of the responsibility to use for that organization (created in step 8).

   Note: Oracle delivers the system profile *OAB: Self Registered User Responsibility* with the seeded value of Self Registered Employee Default Responsibility predefined at the site level.

The self–service menu for this seeded responsibility gives access to only a subset of employee self–service transactions.

10. Log into Self–Service with the user name and password you created.

    As the system administrator, the first time you log into self–service, you gain access by using the password you created in step 3. After entering it, you must change the password to the generic password you want new people to use when accessing self–service initially to register.

11. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step 9) to the new user name.

Configuring the New Employee and Non–Employee Registration Processes

These processes are part of the Human Resources Self–Service item type. The New Employee Registration process displays the pages for new employees to create HR records and self–service user names for themselves. The Non–employee Registration process creates person records in the HRMS system for people who are not employees. This process is used by US benefit providers who have licensed Oracle Advanced Benefits to display pages for participants or dependents to register on the system to elect COBRA coverage.

These processes include, by default, the following pages:

Page	Required?	Purpose
Introduction	No	This page includes a checklist of information that new users must have when entering their registration, and a legal agreement that users must agree to before proceeding.
Verification	No	This page has the user enter minimal information about themselves. This way the system can check for their existence on the database before they attempt to register their data.
Basic Details	Yes	Users enter marital status, and other personal data.
Main Address	Yes	Users can enter a primary address and two other addresses.
Phone Numbers	No	Users can enter the phone numbers they require.
Assignment	Yes, for New Employee process (not in non–employee process)	Employees can fill in information about their organization, job, position, grade, payroll, assignment status, people group, and additional employment information.

Page	Required?	Purpose
Family Member Coverage	No	This page simply asks users whether they wish to enter details of other family members. If they confirm that they do, the Add Family Members page appears.
Add Family Members	No	Users can enter names, addresses, phone numbers, and additional personal information for as many contacts as they require.
Life Events	No	**Relevant to US Third Party Benefits providers only.** Users can select the life event that has made them eligible for a benefits program. This creates a potential life event for the person. NOTE: Employers must remove this page from the process.
User Name	No	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

Note: It is not currently possible to route the information entered by the user for approval by workflow. You can set up Alerts to notify the HR administrator that a new person record has been created.

To configure the Registration processes, you make some changes using Workflow Builder and others using the Configuration Framework.

Using Workflow Builder

▶ **To configure the New Employee and Non–employee Registration workflows:**

1. Decide which pages you want to use in the process. You *must* include Personal Details, Main Address, Review, Cancel, and—for the New Employee Registration process only—Employment Details (to identify the correct organization).

   To delete pages, delete the corresponding activities from the workflow process.

   Employers must delete the Life Event page from the registration process. Oracle Advanced Benefits customers can use life event triggers in the database to determine benefit enrollment opportunities. There are no life event restriction capabilities in Standard Benefits.

2. Decide in what sequence you want pages to appear. The Introduction page normally appears first, followed by Personal Details. The only pages that can come before Personal Details are Introduction and Verification. For the Non–employee Registration workflow, the life event page must be before the Personal Details page.

   To change the sequence of pages, edit the workflow process diagram.

See: Configuring Workflow Objects: page 6 – 5

Using the Configuration Framework

For each region, decide which region items you want to display. If you have implemented Standard Benefits or Oracle Advanced Benefits, ensure you are including all the fields that capture information required to assess benefits eligibility.

On the Personal Information page:

- You must display the Last Name, Gender and Hire Date fields.
- If you use rates, and therefore need a Payroll, you must require a birth date.
- In non–US countries, you should hide the field Covered Under Medicare.
- Make the Employee Number field enterable if you do not generate employee numbers in your business group.

On the Employment Information page (New Employee Registration only):

- You must display the Organization field.
- If you use rates or element entries, you must display the Payroll field.
- In localizations that use GRE, you should display the GRE field.

On the Verification page:

- You can add fields to assist the search, such as national identifier (for example, social security number), person descriptive flexfields, employee number, and email address.
- If the information entered on the Verification page matches more than one person, the application displays a tables of the duplicates so the user can choose one. Decide what information to include in this table. You can add birth date, Social Security Number, employee number, person descriptive flexfields, and FND username.

For a list of configurable regions, see: New Employee Registration and Non–employee Registration: page 9 – 36.

See also: Configuring Web Pages: page 7 – 4

Setting Up Life Events (Advanced Benefits only)

This section is relevant only to third party benefits providers who are including the Life Events page in the process flows. Employers who use Oracle Advanced Benefits should rely on life event triggers to determine the necessary processing instead of using this page.

You determine which life events appear on the Life Events page by the *Selectable for Self–Service* code you enter when you define the life event in the professional user interface. The code choices are:

- All—meaning that the life event can be selected in all self–service processes that use the Life Events page.
- Basic Registration—meaning that the life event can be selected in the New Employee Registration process
- COBRA Registration—meaning that the life event can be selected in the Non–employee Registration process
- Basic and COBRA Registration—meaning that the life event can be selected in both the New Employee and the Non–employee Registration processes

Colliding Life Events

When a person selects a life event from this page, the process will insert the event as a potential life event for the person. By completing the rest of the registration process, the person may have other life events detected due to life event triggers in the business group. Ensure that your life event collapsing and collision logic leaves a user with just one "winning" potential life event during the Participation Process. You could do this by one of the following approaches:

- Ensuring that all life events that can be selected in Registration have the Override check box selected (and other life events that might be triggered do not). Then, during setup of collapsing life events, you could choose which event should win if there is more than one overriding event.
- Turning off automatic triggering of life events
- Removing Life Event page from workflow and configuring life event triggers in the business group to be detected based on data entered by the person during the registration process. This is the approach that employers should use to determine data changes that may give the person an opportunity to make benefit election changes.

Configuring the Create User Name Process

The Create User Name Process workflow within the Human Resources Self–Service item type displays the pages for people who already have a record on the HR database to create their own self–service user names and passwords.

This process includes, by default, the following pages:

Page	Required?	Purpose
Verification	Yes	This page has the user enter minimal information about themselves. This page must find one and only one person matching the information entered so that the User is connected to the correct HR record
User Name	Yes	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

▶ **To configure the Create User Name process:**

1. Decide whether users should log on to use this process with a generic company ID or with a guest ID (which would happen automatically and be invisible to the user).
2. If you decide to use a company ID for extra security:
   - Decide whether to create an ID specific to this process, or shared with the new employee registration process. This determines whether the user sees a menu of processes after logging on, or is taken straight to the Create User Name process.

- Decide how to communicate the company IDs to your users. One approach—if you have licensed Oracle Advanced Benefits—is to create a new communication type and use the Determine Communications batch process. This approach will only work for people currently in the database.

3. If you decide to use a guest ID, there are three approaches you can use. Do ***one*** of the following:

   - In the Users window, create the guest user with the user name GUESTOAB and the password GUESTOAB. You can grant this user the predefined New User Registration responsibility or your copy of it. Log on using this user to change the password to WELCOME.

     Call the supplied pl/sql procedure ben_guest_user_api without passing a user name and password. The procedure uses user name GUESTOAB and the password WELCOME. It passes the user name and unencrypted password into the call to oraclehomepage.home().

     Note: Call ben_guest_user_api from a URL in this way: [APPS_WEB_AGENT]ben_guest_user_api.login?i_1=USERNAME&i_2=PASSWORD&rmode=2

   - In the Users window, create the guest user with any name and password. Log on using this user to change the password.

     Call the supplied pl/sql procedure ben_guest_user_api, passing a user name and unencrypted password. (For the format of the call, see the Note above) If the user name is passed in, the password must be too, or the procedure returns an error. The procedure passes the user name and unencrypted password into the call to oraclehomepage.home().

   - Call oraclehomepage.home directly passing a user name/password if desired. (For example, oraclehomepage.home?userid=<your user name>&password=<your password>).

4. On the Verification page:

   - Decide what information a user must enter on the Verification page of the system to identify the existing HR person record. By default this information is: first name, last name, and birth date. You can add the following fields: national identifier (such as social security number), employee number, email address, supervisor, organization, location, address, and person flexfields.

   - Decide what to display if the information entered on the Verification page matches more than one person. By default, the application displays an error.

For a list of configurable regions, see: Create User Name: page 9 – 41.

5. Decide what should happen if users try to create a user name when they do not have an existing HR record. By default the application issues an error directing the user to retry or Cancel to the menu and contact their administrator. You can configure the message text and the URL associated with the Cancel button. For example, the Cancel button could take them straight to the New Employee Registration process, rather than to the menu.

6. Determine which responsibility to assign to the new users. By default, all new users are granted the responsibility set in the OAB:Self Registered User Responsibility profile option. You may wish to configure this to vary the responsibility by the person type (especially employee versus non–employee).

   To do this, you can create different generic IDs (and responsibilities) for different groups of users and change the OAB:Self Registered User Responsibility profile option at responsibility level.

Generating Self–Service User Names and Passwords

When a person has registered themselves in the HR database, you can choose to generate their self–service user name and password, rather than have them create their own. You can implement this using user hooks.

▶ **To generate user names and passwords:**

1. Write the PL / SQL to generate the user names and passwords as you require, using the user hooks.

   See: User Hooks To Generate User Names for New User Registration (appendix): page A – 9.

2. Optionally, edit the instruction text on the User ID page, hide the user name and password fields, and change the button label from Next to Generate.

3. Consider how you will inform users of their user name. One approach—for Oracle Advanced Benefits customers—is to use a user hook to call your own code that populates the communication tables, and use this information to alert your users. Another approach is to generate the user names in a standard and predictable way from users' names or national identifiers.

New Employee Registration and Non–employee Registration

These modules are available under the predefined New User Registration Responsibility. They can be used as part of employee self–service or manager self–service. Using New Employee Registration, users log on with a generic user name to create their own employee records in Oracle HRMS, and their own self–service user name and password. Using Non–employee Registration, other people can log on to create non–employee records in your Oracle HRMS.

Menu and Function Names

User Menu Name	Function Name
New User Registration	New Employee Registration
New User Registration	Non–employee Registration

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

New Employee Registration Process and COBRA Registration Process

See: *Oracle Workflow Guide* (available on Metalink)

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

For the Personal Information pages (Basic Details, Main Address, Secondary Address, Phone Numbers, and Contacts) see: Personal Information Modules: page 10 – 2. For the Assignment page, see Assignment: page 11 – 4.

The Registration modules have introduced some new regions and pages:

Tertiary Address Page

Region Code	Region Name
HR_TERTIARY_ADDRESS_REVIEW_SS	Other Address
HR_TERTIARY_ADDRESS_OVIEW_SS	Tertiary Address Overview

Assignment Page

Region Code	Region Name
HR_PAYROLL_SS	Payroll
HR_GRE_SS	GRE

Introduction Page

Region Code	Region Name
BEN_AGRMT_CHKLST_PAGE	Oracle Self–Service Human Resources: Agreement Checklist
BEN_AGRMT_CHKLST_MAIN _CONTENT	Agreement Checklist Main Content
BEN_AGRMT_CHKLST_AGRMT_CONT	Agreement Content

Family Member Coverage Page

Region Code	Region Name
BEN_CONTACTS_YES_NO_PAGE	Oracle Self–Service Human Resources: Add Contacts
BEN_CONTACTS_YES_NO_CONTENT	Family Member Coverage

Life Event Page

Region Code	Region Name
BEN_LIFE_EVENT_PAGE	Oracle Self–Service Human Resources: Life Events
BEN_LIFE_EVENT_CONTENT	Ben Life Event Content
BEN_LIFE_EVENT_COBRA	Ben Life Event Cobra
BEN_LIFE_EVENT_CURRENT	Ben Life Event Current
BEN_LIFE_EVENT_REVIEW_SS	Life Event Review

Cancellation Page

Region Code	Region Name
BEN_REG_CANCEL_PAGE	Oracle Self–Service Human Resources: Cancellation
BEN_REG_CANCEL_MAIN_CONTENT	Registration Cancel Main Content

Decline Agreement Page

Region Code	Region Name
BEN_REG_DECLINE_PAGE	Oracle Self–Service Human Resources: Decline Agreement
EN_REG_DECLINE_MAIN_CONTENT	Registration Decline Main Content

User Name Page

Region Code	Region Name
BEN_USER_PAGE	Oracle Self–Service Human Resources: Registration User
BEN_USER_MAIN_CONTENT	Registration User Main Content
BEN_USER_REVIEW_SS	Registration User Review Content

Verification Page

Region Code	Region Name
BEN_REG_VERIFICATION_PAGE	Oracle Self–Service Human Resources: Verification
BEN_VERIFICATION_MAIN_CONTENT	Verification Main Content
BEN_VERIFICATION_CONTENT	Verification Content
BEN_VERIFICATION_PER_CONTENT	Verification Registered People
BEN_VERIFICATION_PER_TABLE	Verification Person Table
BEN_VERIFICATION_WARNING	Ben Verification Warning

See: Configuring Regions and Region Items: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
BEN_LIFE_EVENT_COBRA	Ben Life Event Cobra	Ben Effective Date	Message	BEN_COBRA_LIFE_EVENT_DATE
BEN_LIFE_EVENT_COBRA	Ben Life Event Cobra	Life Event Name	Message	BEN_LIFE_EVENT_COBRA
BEN_LIFE_EVENT_CURRENT	Ben Life Event Current	Ben Effective Date	Message	BEN_LIFE_EVENT_DATE
BEN_LIFE_EVENT_CURRENT	Ben Life Event Current	Life Event Name	Message	BEN_LIFE_EVENT_CURRENT
BEN_USER_MAIN_CONTENT	Registration User Main Content	User Password	Short Tip	HR_INCORRECT_PASSWORD_LENGTH
BEN_VERIFICATION_CONTENT	Verification Content	Date of Birth	DATE_FORMAT	

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
BEN_ VERIFICATION_ CONTENT	Verification Content	Additional Personal Details Flex	PER_PEOPLE

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: User to Organization Link	All	Organizations	Null
OAB User to Payroll Link	All	Payrolls	Null
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site—set to Yes	Yes / No	No

See: User Profiles (*Oracle HRMS Applications User Guide*)

Create User Name

This module is available under the predefined New User Registration Responsibility. It can be used as part of employee self–service. Using Create User Name, people who already have an HR record in Oracle HRMS can create their own self–service user names and passwords.

Menu and Function Names

User Menu Name	Function Name
New User Registration	Create User Name

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

Create User Name Process

See: *Oracle Workflow Guide* (available on Metalink)

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

User Name Page

Region Code	Region Name
BEN_USER_PAGE	Oracle Self–Service Human Resources: Registration User
BEN_USER_MAIN_CONTENT	Registration User Main Content
BEN_USER_REVIEW_SS	Registration User Review Content

Verification Page

Region Code	Region Name
BEN_NEW_USER_VER_PAGE	Oracle Self–Service Human Resources: New User Verification
BEN_NEW_USER_VER_CONTENT	New User Creation Verification Content

See: Configuring Regions and Region Items: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
BEN_NEW_USER_ VER_CONTENT	New User Creation Verification Content	Date of Birth	DATE_ FORMAT	
BEN_USER_MAIN_ CONTENT	Registration User Main Content	User Password	Short Tip	HR_INCORRECT_ PASSWORD_ LENGTH

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
BEN_NEW_USER_ VER_CONTENT	New User Creation Verification Content	Additional Personal Details Flex	PER_PEOPLE

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site—set to Yes	Yes / No	No

See: User Profiles (*Oracle HRMS Applications User Guide*)

CHAPTER

10 Employee Demographics

Personal Information Modules

The Personal Information function enables employees to enter and update their own personal records. This function is integrated within Oracle Workflow. By using Oracle Workflow and the Web Applications Dictionary, you can design a process to control which personal details an employee can change or display. You can also design an approval process for any changes made by employees or managers. The Personal Information function can be used to update basic details such as Marital Status, Title, First and Last Name, Addresses, Emergency Contacts, and Dependents and Beneficiaries.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Personal Information V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Summary Page

Region Code	Region Name
HR_OVERVIEW_TOP_SS	Top Region
HR_OVERVIEW_CONTENT_SS	Overview Page 1st Level Nested Region

Region Code	Region Name
HR_BASIC_DETAIL_OVIEW_SS	Basic Details
HR_PHONE_OVIEW_SS	Phone Numbers
HR_MAIN_ADDRESS_OVIEW_SS	Main Address
HR_SECONDARY_ADDRESS_OVIEW_SS	Other Address
HR_TERTIARY_ADDRESS_OVIEW_SS	Other Address
HR_CONTACTS_OVERVIEW_CONT_SS	Family and Friends

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_BASIC_DETAIL_ACCT_TYPE_SS	Basic Details Action Type	Dynamic Label		HR_INST_BASIC_DETAILS_TOC
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_EFFECTIVE_DATE	Long Message	HR_TIP_EFFECTIVE_DATE
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	Prefix	Long Message	HR_TIP_PREFIX
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_SUFFIX	Long Message	HR_TIP_SUFFIX
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	Preferred Name	Long Message	HR_TIP_PREFERRED_NAME
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_PREV_LAST_NAME	Long Message	HR_TIP_PREVIOUS_LASTNAME
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR Instruction		HR_INST_BASIC_DETAILS_FORM
HR_PHONE_OVIEW_SS	Phone Numbers Overview	HR Instruction		HR_PERINFO_PHONES_ABOVE_LIMIT
HR_PHONE_NUMBERS_SS	Phone Numbers Update	hrphonetext		HR_INST_PHONES_FORM

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddress-seffctdate	Long Message	HR_TIP_MADDR_EFFECTIVE_DATE
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddress-type	Long Message	HR_TIP_MADDR_ADDRESS_TYPE
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-CorrectInst		HR_INST_MAIN_CORRECT_ADDRESS
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-NewChgInst		HR_INST_MAIN_NEW_CHG_ADDRESS
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-ViewFutureInst		HR_INST_VIEW_FUTURE_ADDRESS
HR_MAIN_ADDR_ACT_TYPE_SS	Main Address Action Type	Dynamic Label		HR_INST_MAIN_ADDRESS_TOC
HR_SECONDARY_ADDRESS_OVIEW_SS	Secondary Address Overview	HR Instruction		HR_PERINFO_MULTIPLE_ADDRESSES
HR_SECONDARY_ADDR_ACT_TYPE_SS	Secondary Address Action	Dynamic Label		HR_INST_SECONDARY_ADDRESS_TOC
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddress-seffctdate	Long Message	HR_TIP_SADDR_EFFECTIVE_DATE
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddress-type	Long Message	HR_TIP_SADDR_ADDRESS_TYPE
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddress-CorrectInst		HR_INST_SCND_CORRECT_ADDRESS
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddress-NewChgInst		HR_INST_SCND_NEW_CHG_ADDRESS
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddress-ViewFutureInst		HR_INST_VIEW_FUTURE_ADDRESS

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddressflex	Address Structure
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddressflex	Address Structure
HR_MAIN_ADDRESS_REVIEW_SS	Main Address Review	hraddressflex	Address Structure
HR_SECOND_ADDRESS_REVIEW_SS	Second Address Review	hraddressflex	Address Structure

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Basic Details

The Basic Details module records information such as the employee's name and marital status.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Basic Details V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Basic Details Page

Region Code	Region Name
HR_BASIC_DET_ACT_TYPE_TOP_SS	Basic Details Action
HR_BASIC_DETAIL_ACT_TYPE_SS	Basic Details Action 1st Level Nested Region

Region Code	Region Name
HR_BASIC_DET_UPDATE_TOP_SS	Basic Details
HR_BASIC_DETAIL_UPDATE_SS	Basic Details 1st Level Nested Region
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry
HR_BASIC_DETAIL_OTHER_UPD_SS	Basic Detail Update Other Entry
HR_BASIC_DETAIL_REVIEW_SS	Basic Details Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_BASIC_DETAIL_ACCT_TYPE_SS	Basic Details Action Type	Dynamic Label		HR_INST_BASIC_DETAILS_TOC
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_EFFECTIVE_DATE	Long Message	HR_TIP_EFFECTIVE_DATE
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	Prefix	Long Message	HR_TIP_PREFIX
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_SUFFIX	Long Message	HR_TIP_SUFFIX
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	Preferred Name	Long Message	HR_TIP_PREFERRED_NAME
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR_PREV_LAST_NAME	Long Message	HR_TIP_PREVIOUS_LASTNAME
HR_BASIC_DETAIL_NAME_UPD_SS	Basic Detail Update Name Entry	HR Instruction		HR_INST_BASIC_DETAILS_FORM

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	Flexfield Name
HR_BASIC_DETAIL_OTHER_UPD_SS	Basic Detail Update Other Entry	hrpersondevfflex	Person Developer DF
HR_BASIC_DETAIL_OTHER_UPD_SS	Basic Detail Update Other Entry	Add Per Details Flexfield	PER_PEOPLE

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Main Address

The Main Address module stores the employee's primary address.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Main Address V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Main Address Page

Region Code	Region Name
HR_MAIN_ADDR_ACT_TYPE_TOP_SS	Main Address Action
HR_MAIN_ADDR_ACT_TYPE_SS	Main Address Action 1st Level Nested Region
HR_MAIN_ADDR_TOP_SS	Main Address
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update
HR_MAIN_ADDRESS_REVIEW_SS	Main Address Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddres-seffctdate	Long Message	HR_TIP_MADDR_EFFECTIVE_DATE
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddress-type	Long Message	HR_TIP_MADDR_ADDRESS_TYPE
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-CorrectInst		HR_INST_MAIN_CORRECT_ADDRESS
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-NewChgInst		HR_INST_MAIN_NEW_CHG_AD-DRESS
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	HrAddress-ViewFutu-reInst		HR_INST_VIEW_FU-TURE_ADDRESS
HR_MAIN_ADDR_ACT_TYPE_SS	Main Address Action Type	Dynamic La-bel		HR_INST_MAIN_ADDRESS_TOC

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_MAIN_ADDRESS_UPDATE_SS	Main Address Update	hraddressflex	PER_ADDRESSES
HR_MAIN_ADDRESS_REVIEW_SS	Main Address Re-view	hraddressflex	PER_ADDRESSES

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Secondary Address

The Secondary Address module stores additional addresses for an employee.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Secondary Address V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Other Address Page

Region Code	Region Name
HR_SEC_ADDR_ACT_TYPE_TOP_SS	Secondary Address Action
HR_SECONDARY_ADDR_ACT_TYPE_SS	Secondary Address Action 1st Level Nested Region

Region Code	Region Name
HR_SECONDARY_ADDR_TOP_SS	Secondary Address
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update
HR_SECOND_ADDRESS_REVIEW_SS	Second Address Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_SECONDARY_ADDRESS_OVIEW_SS	Secondary Address Overview	HR Instruction		HR_PERINFO_MULTIPLE_ADDRESSES
HR_SECONDARY_ADDR_ACT_TYPE_SS	Secondary Address Action	Dynamic Label		HR_INST_SECONDARY_ADDRESS_TOC
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddresseffctdate	Long Message	HR_TIP_SADDR_EFFECTIVE_DATE
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddresstype	Long Message	HR_TIP_SADDR_ADDRESS_TYPE
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddressCorrectInst		HR_INST_SCND_CORRECT_ADDRESS
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddressNewChgInst		HR_INST_SCND_NEW_CHG_ADDRESS
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddressViewFutureInst		HR_INST_VIEW_FUTURE_ADDRESS

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	hraddressflex	Address Structure
HR_SECOND_ADDRESS_REVIEW_SS	Second Address Review	hraddressflex	Address Structure

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Phone Numbers

The Phone Numbers module stores the telephone information for an employee.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Phone Numbers V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Phone Numbers Page

Region Code	Region Name
HR_PHONE_NUMBERS_TOP_SS	Phone Numbers
HR_PHONE_NUMBERS_SS	Phone Numbers Update
HR_PHONE_NUMBERS_REVIEW_SS	Phone Numbers Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_PHONE_OVIEW_SS	Phone Numbers Overview	HR Instruction		HR_PERINFO_PHONES_ABOVE_LIMIT
HR_PHONE_NUMBERS_SS	Phone Numbers Update	hrphonetext		HR_INST_PHONES_FORM
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddressNewChgInst		HR_INST_SCND_NEW_CHG_ADDRESS
HR_SECOND_ADDRESS_UPDATE_SS	Second Address Update	HrAddressViewFutureInst		HR_INST_VIEW_FUTURE_ADDRESS

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Dependents and Beneficiaries

The Dependents and Beneficiaries module stores the names and contact information for an employee's dependents and beneficiaries.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Dependents and Beneficiaries Main Page

Region Code	Region Name
HR_CONTACTS_MAIN_SS	Contacts Main Table Region
HR_CONTACT_PHONE_NUMBERS_SS	Contacts Phone Numbers
HR_CONTACT_ADDRESS_SS	Contact Address
HR_CONTACTS_ADDL_DETAILS_SS	Additional Dependents and Beneficiary Information

Contacts Selection Page

Region Code	Region Name
HR_CONTACTS_SELECT_TABLE_SS	Contacts Select Overview Region

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Dependents and Beneficiaries Page

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrContactsMainText		HR_289383_CONT_EMRG_MAIN_MSG
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrSuffix	Tip	HR_TIP_SUFFIX
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrPrefix	Tip	HR_TIP_PREFIX
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrDepOrBenContact	Tip	HR_289372_EMRG_CONT_FLAG_TIP
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrPrimaryContact	Tip	HR_289373_PRMRY_REL_MAIN_TIP
HR_CONTACT_PHONE_NUMBERS	Contact Phone Numbers	HrPhoneText		HR_INT_PHONES_FORM
HR_CONTACT_ADDRESS_SS	Contact Address	HrAddressText		HR_289343_CONT_ADDR_MAIN_TEXT

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Emergency Contacts

The Emergency Contacts module stores the contact information for the employee's emergency contacts. Employees can add and delete people from the list of emergency contacts as required.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Personal Information V4.0
Employee Self Service V4.0	Personal Information V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Contacts V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Emergency Contacts Update Page

Region Code	Region Name
HR_CONTACTS_MAIN_SS	Contacts Main Table Region
HR_CONTACT_PHONE_NUMBERS_SS	Phone Numbers

Contacts Selection Page

Region Code	Region Name
HR_CONTACTS_SELECT_TABLE_SS	Contacts Select Overview Region

Emergency Contacts Delete Page

Region Code	Region Name
HR_CONTACTS_DELETE_TOP_SS	Delete Contact
HR_CONTACTS_DELETE_SS	End Relationship
HR_CONTACT_DELETE_REVIEW_SS	Delete Review

Emergency Contacts Review Page

Region Code	Region Name
HR_CONTACTS_REVIEW_CONTENT_SS	1st Level Nested Region for Contact Review
HR_CONTACTS_REVIEW_SS	Name and Relationship
HR_CONTACTS_PHONE_REVIEW_SS	Phone Numbers
HR_CONTACTS_ADDRESS_REVIEW_SS	Address

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Emergency Contacts Page

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrContactsMainText		HR_289383_CONT_EMRG_MAIN_MSG
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrSuffix	Tip	HR_TIP_SUFFIX
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrPrefix	Tip	HR_TIP_PREFIX

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrDepOrBenContact	Tip	HR_289371_DEP_BNF_FLAG_TIP
HR_CONTACTS_MAIN_SS	Contacts Main Table Region	HrPrimaryContact	Tip	HR_289373_PRMRY_REL_MAIN_TIP
HR_CONTACT_PHONE_NUMBERS	Contact Phone Numbers	HrPhoneText		HR_INT_PHONES_FORM

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Professional Details Modules

There are five modules within Professional Details: Competence Profiles, Education and Qualifications, Other Professional Awards, Work Preferences, and Resume. In addition, there are two modules for the US localization (Tenure Tracking and Academic Rank). Employees can maintain their own details or managers can maintain the details for their direct reports.

Education and Qualifications

This module allows users to add qualifications to an existing list of qualifications or to create a new list of qualifications. The user can also add, edit, and delete the major subjects for the qualifications. When the user has created or edited a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

The Education and Qualifications overview page shows the list of approved education qualifications for a person and also those qualifications that are pending approval.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Education and Qualifications Mgr V4.0
Employee Self Service V4.0	Education and Qualifications V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Education and Qualifications V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Qualification Update Page

Region Code	Region Name
HR_QUA_ADD_SUBJECT_TOP_SS	Add Subject
HR_QUA_ADD_SUBJECT_SS	Add Subject
HR_QUA_ADD_TOP_SS	Add Qualifications
HR_QUA_ADD_MAIN_PAGE_SS	Qualification Add Main Page
HR_QUA_ADD_QUALIFICATION_SS	Qualification Add Qualification
HR_QUA_ADD_SCHOOL_SS	Add Qualification Add School
HR_QUA_ADD_AWARD_SS	Qualification Add Award
HR_QUA_ADD_COMMENT_SS	Qualification Add Comments
HR_QUA_ADD_SUBJECT_NESTED_SS	Qualification Add Subject Nested Main
HR_QUA_ADD_SUBJECT_TABLE_SS	Qualification Add Subject Table
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page
HR_QUA_ADD_TRAINING_SS	Qualification Add Training
HR_QUA_ADD_TUITION_SS	Qualification Add Tuition
HR_QUA_NAVIGATION_BAR_SS	Qualification Navigation Bar
HR_QUA_OVERVIEW_APP_SS	Qualification Approved Table
HR_QUA_OVERVIEW_MAIN_PAGE_SS	Qualification Overview Page
HR_QUA_OVERVIEW_PEN_SS	Qualification Pending Approval Table
HR_QUA_OVERVIEW_PEN_SUB_SS	Qualification Pending Approval Header
HR_QUA_OVERVIEW_SUB_SS	Qualification Approved Header
HR_QUA_OVERVIEW_TOP_SS	Education and Qualifications Overview
HR_QUA_SUB_NAVIGATION_BAR_SS	Subject Navigation Bar

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_QUA_OVERVIEW_SUB_SS	Qualification Approved Header	HrAddQua		HR_INST_NO_QUALIFI-CATION_FOUND
HR_QUA_OVERVIEW_MAIN_PAGE_SS	Qualification Overview Page	HrQuaOv-erviewInfo		HR_INST_ADD_QUALIFICATION
HR_QUA_ADD_SUBJECT_NESTED_SS	Qualification Add Subject Nested	HrQuaAdd-SubjectText		HR_INST_QUA_SUBJECT
HR_QUA_ADD_MAIN_PAGE_SS	Qualification Add Main Page	HrQuaAd-dInfoText		HR_INST_NEW_QUALIFICATION
HR_QUA_ADD_MAIN_PAGE_SS	Qualification Add Main Page	HrQuaEdi-tInfoText		HR_INST_EDIT_QUALIFICATION
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page	HrAwar-dAddSub-jectInfoText		HR_INST_AWARD_ADD_SUBJECT
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page	HrAwardE-ditSubjec-tInfo		HR_INST_AWARD_EDIT_SUBJECT
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page	HrQuaAdd-SubjectInfo-Text		HR_INST_QUA_ADD_SUBJECT
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page	HrQuaEdit-SubjectInfo-Text		HR_INST_QUA_EDIT_SUBJECT
HR_QUA_ADD_SUB_MAIN_PAGE_SS	Qualification Add Subject Main Page	HrQuaOv-erviewInfo		HR_INST_AWARD_EDIT_SUBJECT

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Other Professional Awards

This module allows users to add additional professional awards to an existing list of awards or to create a new list of professional awards. Academic awards are entered in the Education and Qualifications page. When the user has created or edited an award, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Other Professional Awards Mgr V4.0
Employee Self Service V4.0	Other Professional Awards V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Other Professional Awards V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Awards Review Page

Region Code	Region Name
HR_AWARD_ADD_TOP_SS	Awards
HR_AWARD_ADD_MAIN_PAGE_SS	Awards Add Main Page

Region Code	Region Name
HR_AWARD_ADD_AWARD_SS	Awards Add Award
HR_AWARD_ADD_COMMENTS_SS	Award Add Comments
HR_AWARD_ADD_LICENSE_SS	Awards Add License Info
HR_AWARD_ADD_QUALIFICATION_SS	Awards Add Qualification
HR_AWARD_ADD_SUBJECT_NESTED_SS	Awards Add Subjects Nested
HR_AWARD_ADD_SUBJECT_TABLE_SS	Awards Add Subject Table
HR_AWARD_ADD_TRAINING_SS	Awards Add Training
HR_AWARD_ADD_TUITION_SS	Awards Add Tuition
HR_AWARD_NAVIGATION_BAR_SS	Award Navigation Bar
HR_AWARD_OVERVIEW_APP_SS	Award Approved Table
HR_AWARD_OVERVIEW_MAIN_PAGE_SS	Award Overview Page
HR_AWARD_OVERVIEW_PEN_SS	Award Pending Approval Table
HR_AWARD_OVERVIEW_PEN_SUB_SS	Award Pending Approval Header
HR_AWARD_OVERVIEW_SUB_SS	Award Approved Header
HR_AWARD_OVERVIEW_TOP_SS	Other Professional Awards Overview

Awards Review Page

Region Code	Region Name
HR_AWARDS_REVIEW_SS	Awards Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_AWARD_ADD_SUBJECT_NESTED_SS	Awards Add Subjects Nested	HrQuaAddSubjectText		HR_INST_AWARD_SUBJECT
HR_AWARD_ADD_MAIN_PAGE_SS	Awards Add Main Page	HrQuaAddInfoText		HR_INST_NEW_AWARD
HR_AWARD_ADD_MAIN_PAGE_SS	Awards Add Main Page	HrQuaEditInfoText		HR_INST_EDIT_AWARD
HR_AWARD_OVERVIEW_SUB_SS	Award Approved Header	HrAddQua		HR_INST_NO_AWARD_FOUND
HR_AWARD_OVERVIEW_SUB_SS	Award Approved Header	HrAddQuaFound		HR_INST_AWARD_FOUND
HR_AWARD_OVERVIEW_MAIN_PAGE_SS	Award Overview Page	HrQuaOverviewInfo		HR_INST_ADD_AWARD

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Competence Profile

The Competence Profile enables the user to record a set of competences for an individual. Competences include knowledge, skills, and personal or professional attributes. Access to the competencies function may be restricted to specific users, for example, the line manager. There is the need for a security mechanism to define who can maintain competences for which employees.

The Competence Profile Overview page has three sections:

- Current competencies
- Current session changes
- Competences pending approval

In the Competence Profile Overview page, you can:

- View the Competence Profile History
- Add additional competences
- Update competence levels
- Correct existing competences
- Correct or delete session changes

In the Add Competence page, you can:

- Search for competences to add to your profile
- Create default profiles
- Add additional information on competences

In the New Levels Attained page, you can

- Enter information on the competence level attained

All pages allow you to validate the changes made.

A person's competencies are only valid in the context of the proficiency level at which they demonstrate each competence. A competence definition associated with a competence profile typically 'ends' when a new level of the competence is attained. Typically, a person may have a continuous series of records for a given competence showing progression from one level to the next. The levels for a given competence can fluctuate over time. A given competence can also become obsolete within a person's competence profile.

Proficiency scales can vary with each competence so it is essential that the user has access to the descriptions for the competence, its associated levels, and its behavioral indicators wherever a competence and scale is displayed. The proficiency levels must be displayed dynamically depending on the selected competence.

The user can copy the competences defined for the job or position related to a person's assignment across to their competence profile using the Default Competences button in the Add Competence page. However, the user must update the proficiency level manually as this is not copied across.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Competence Profile Mgr V4.0
Employee Self Service V4.0	Competence Profile V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Competence Profile V4.0

See: *Oracle Workflow Guide* (available on Metalink)

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Competence Overview Page

Region Code	Region Name
HR_COMP_OVERVIEW_TOP_SS	Competences Overview

Competence History and Details Page

Region Code	Region Name
HR_COMP_HISTORY_TOP_SS	Expired Competences
HR_COMP_HISTORY_MAIN_PAGE_SS	Expired Competences Main Page Region
HR_COMP_HIST_DET_TOP_SS	Competence History Details
HR_COMP_HIST_DET_MAIN_PAGE_SS	Competence History Details Main Page

Competence Correction Page

Region Code	Region Name
HR_COMP_CORRECT_TOP_SS	Correction
HR_COMP_CORRECT_MAIN_PAGE_SS	Correction Main Page

Add Competence and Details Page

Region Code	Region Name
HR_ADD_DETAIL_TOP_SS	Add Competence Details
HR_ADD_DETAIL_MAIN_SS	Add Detail Main Page
HR_COMP_ADD_TOP_SS	Add Competences
HR_COMP_ADD_MAIN1_SS	Addition Main Page

Update Competence and Details Page

Region Code	Region Name
HR_COMP_UPDATE_TOP_SS	Update
HR_COMP_UPDATE_MAIN1_SS	Update Main Page
HR_UPDATE_DETAIL_TOP_SS	Update Detail
HR_UPDATE_DETAIL_MAIN_SS	Update Detail Main Page

Correct Current Session Changes

Region Code	Region Name
HR_COMP_CURRENT_CHANGES_TOP_SS	Current Changes
HR_COMP_CURRENT_CHANGES_SS	Current Changes Main Page

Competence Review and Details Page

Region Code	Region Name
HR_COMP_REVIEW_SS	Competence Profile
HR_REVIEW_DETAILS_TOP_SS	Review Details
HR_REVIEW_DETAILS_MAIN_SS	Review Details Main Page

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_COMP_CORRECT_MAIN_PAGE_SS	Correction Main Page	Correction Header		HR_COMP_CORRECTION_SS
HR_COMP_CURRENT_CHANGES_SS	Current Changes Main Page	Correction Header		HR_COMP_CORRECTION_SS

See: Adding Instructions to a Web Page: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Work Preferences

The Work Preferences function enables users to store information about their preferred work location and their relocation and travel preferences. Employees can enter the information for themselves and managers can enter the information for their direct reports.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Work Preferences Mgr V4.0
Employee Self Service V4.0	Work Preferences V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Work Preferences Update Page

Region Code	Region Name
HR_WORK_PREFERENCE_TOP_SS	Work Preferences
HR_WORK_PREFERENCE_SS	Work Preferences

Region Code	Region Name
HR_WP_DOMESTIC_OPTIONS_SS	Domestic Options
HR_WP_INTERNATIONAL_OPTIONS_SS	International Relocation Options
HR_NAVIGATION_BAR_SS	Work Preference Navigation Bar

Work Preferences Review Page

Region Code	Region Name
HR_WP_REVIEW_SS	Work Preference Review Page
HR_WP_DOMESTIC_REVIEW_SS	Domestic Options Review
HR_WP_INTERNATIONAL_REVIEW_SS	International Relocation Options Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_WORK_PREFERENCE_SS	Work Preferences	HrInstruction		HR_INST_WORK_PREFERENCES

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Resume

The Resume module enables an employee to store and update their own resume. A manager can store a resume for an employee or update the resume with new information.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service V4.0	Resume Mgr V4.0
Employee Self Service V4.0	Resume V4.0

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Resume Update Page

Region Code	Region Name
HR_RESUME_TOP_SS	Resume
HR_RESUME_SS	Resume

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_RESUME_SS	Resume	HrInstruction		HR_INST_TEXT_RESUME

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Tenure Tracking (US)

Tenure is a unique term in the ”Education Industry” that means the completion of professional criteria and an extended probationary period. This results in a person attaining permanent employment with the institution. The Tenure Status module captures the following information:

- Tenure status
- Date determined
- Projected tenure date
- Adjusted tenure date
- Reason for adjustment
- Subject to tenure quota?

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Professional Details V4.0	Tenure Status Mgr V4.0
Professional Details V4.0	Tenure Status Overview

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Tenure Status V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the OA Configuration Framework:

Regions

Tenure Status Page

Region Code	Region Name
PQH_TENURE_STATUS_TOP	Tenure Status Top
PQH_TENURE_STATUS	Tenure Status
PQH_TENURE_STATUS_OVERVIEW_TOP	Tenure Status Overview Top
PQH_TENURE_STATUS_FLEX	Tenure Status Flex

Tenure Status Review Page

Region Code	Region Name
PQH_TENURE_STATUS_REVIEW	Tenure Status Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
PQH_TENURE_STATUS_FLEX	Tenure Status Flex	Descriptive Flex-field	Extra Person Info DDF

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Academic Rank (US)

The Academic Rank module is a method for promotional progression within Higher Education. The Academic Rank module captures the following information:

- Academic rank
- Start date and end date
- Next academic rank
- Projected date

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Professional Details V4.0	Academic Rank Mgr

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Academic Rank V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Academic Rank Page

Region Code	Region Name
PQH_ACADEMIC_RANK_TOP	Academic Rank Top
PQH_ACADEMIC_RANK	Academic Rank

Region Code	Region Name
PQH_ACADEMIC_RANK_OVRVW_TOP	Academic Rank Overview Top
PQH_ACADEMIC_RANK_FLEX	Academic Rank Flex

Academic Rank Review Page

Region Code	Region Name
PQH_ACADEMIC_RANK_REVIEW	Academic Rank Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
PQH_ACADEMIC_RANK_FLEX	Academic Rank Flex	Descriptive Flex-field	Extra Person Info DDF

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

CHAPTER

11 Manage Employee Events Functions

MEE Functions and Workflow

The Manage Employee Events module groups together workflow processes that relate to changes in an employee's assignment. You can build and configure these workflow processes to suit the requirements of your enterprise. The basic MEE functions are: Assignment, Location, Work Schedule, Change Manager, Termination, Pay Rate, Individual Compensation Distributions, Special Information Types, ad Other Employment Information.

Chained MEE Processes

Oracle Workflow enables you to combine different MEE functions into one workflow process. Such processes are known as chained processes. SSHR includes the following predefined chained processes which appear as functions on the user menus:

- Change Cost Center, Location, Manager V4.0
- Change Manager

  Note: You can also include the Benefits function Individual Compensation Distributions (ICD) in chained processes, if required.

Ordering MEE Workflow Processes

The order of workflow processes must be carefully designed to ensure business rules are maintained and implemented. If you choose to create your own chained processes and functionality, you must consider the following rules when designing the sequence of functions:

Function	Restriction
Assignment	If the Assignment module is present in a chained process, it must appear first.
Location	
Individual Compensation Distributions	Can appear anywhere in the chain
Other Employment Information	Can appear anywhere in the chain
Pay Rate	Can appear anywhere in the chain
Special Information Types	Can appear anywhere in the chain
Change Manager	If used in a chain with Termination, it should follow Termination
Termination	If used in a chain with Supervisor, it should precede Supervisor

You can configure your own processes in any number of ways but they must be in the sequence outlined above. For example, you could configure a process that follows this sequence:

- Step 1: Assignment
- Step 2: Location
- Step 5: Work Schedule

But, you cannot configure a process in this order, as you will break business rules:

- Step 2: Location
- Step 1: Assignment
- Step 5: Work Schedule

As long as you maintain the order of steps you can configure whichever workflow processes your enterprise needs.

Assignment

The Assignment module is used in some delivered Manage Employee Events (MEE) menu functions, for example, the Employee Status Change chained process. It can be added in any of your own business processes that you model in the Workflow Builder.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Deploy Person V4.0

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
	Assignment V4.0	Use Grade Points
		Set Grade Ceiling
		Use Step / Grade No Update
		Display Job Attachment
		Display Position Attachment
		HR Element Warning
		Asg Change Reason Lookup Codes

See: Configuring Workflow Attribute Values: page 6 – 7

User Grade Points

Defines whether the ceiling point can be displayed.

Set Grade Ceiling

Defines whether the ceiling point can be updated.

Use Step/Grade No Update

Defines whether the grade can be changed if spinal points exist.

HR Element Warning

Controls whether the hr element warning is displayed.

Asg Change Reason Lookup Codes

Allows system administrator to specify which change reason lookup codes should be displayed (subset of change reason lookup codes).

Display Job Attachment

Whether attachments are displayed for the job.

Display Position Attachment

Whether attachments are displayed for the position.

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Assignment Update Page

Region Code	Region Name
HR_ASSIGNMENT_TOP_SS	Assignment
HR_ASSIGNMENT_SS	Assignment
HR_ASSIGNMENT_STATUS_SS	Assignment Status
HR_ORGANIZATION_SS	Department
HR_JOB_SS	Job
HR_POSITION_SS	Position
HR_GRADE_SS	Grade
HR_PEOPLE_GROUP_SS	People Group
HR_OTHER_ASSIGNMENT_SS	Other Assignment Information

Assignment Display Page

Region Code	Region Name
HR_ORGANIZATION_DETAILS_TOP_SS	Department Details
HR_ORGANIZATION_DETAILS_SS	Department Details

Region Code	Region Name
HR_ORG_DETAILS_MORE_INFO_SS	More Department Informaton
HR_ORG_DETAILS_WORK_DAY_SS	Department Working Conditions
HR_JOB_SS	Job
HR_POSITION_SS	Position
HR_GRADE_SS	Grade
HR_PEOPLE_GROUP_SS	People Group
HR_OTHER_ASSIGNMENT_SS	Other Assignment Information
HR_JOB_DETAILS_TOP_SS	Job Details
HR_JOB_DETAILS_SS	Job Details
HR_JOB_DETAILS_MORE_INFO_SS	More Job Information
HR_JOB_DETAILS_SPECIFIC_SS	Specific Job Information
HR_JOB_VALID_GRADE_SS	Job Valid Grades
HR_JOB_VALID_GRADE_TABLE_SS	Job Valid Grades Table
HR_POSITION_DETAILS_TOP_SS	Position Details
HR_POSITION_DETAILS_SS	Position Details
HR_POSITION_EXTRA_INFO	Extra Position Information
HR_POS_DETAILS_MORE_INFO_SS	More Position Information
HR_POSITION_VALID_GRADE_SS	Position Valid Grades
HR_POS_VALID_GRADE_TABLE_SS	Position Valid Grades Table
HR_GRADE_DETAILS_TOP_SS	GRade Details
HR_GRADE_DETAILS_SS	Grade Details
HR_GRADE_DETAILS_MORE_INFO_SS	More Grade Information
HR_GRADE_STEPS_SS	Grade Steps
HR_GRADE_STEPS_TABLE_SS	Grade Steps Table

Assignment Review Page

Region Code	Region Name
HR_ASG_REVIEW_SS	Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_JOB_DETAILS_SPECIFIC_SS	Specific Job Information	HrFlex1	Job Developer DF
HR_POSITION_EXTRA_INFO_SS	Extra Position Information	HrFlex1	Extra Position Info DDF
HR_ORG_DETAILS_WORK_DAY_SS	Department Working Conditions	HrFlex1	Org Developer DF
HR_PEOPLE_GROUP_SS	People Group	People Group Key Flex	GRP
HR_OTHER_ASSIGNMENT_SS	Other Assignment Information	Assignment Flex	PER_ASSIGNMENTS

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Termination

The Termination page enables a manager to end an employee's employment relationship. For this reason, the Termincation function is not available in the Employee Self Service menu. If the terminated employee has direct subordinates, the system will automatically display the Change Supervisor page to reassign the terminated supervisor's subordinates to another supervisor. You can configure which Termination Reasons are displayed to the user in the Termination page. You configure the reasons in the workflow activity attribute configuration. For example, if your enterprise does not want a manager to select the Termination Reason lookup code of "Involuntary Termination", you can exclude it by omitting this lookup code in workflow.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Termination Process V4.0

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Termination Process V4.0	Termination Page V4.0	Termination Reason Lookup Codes

Termination Reason Lookup Codes

This attribute allows users to configure which Termination Reason lookup Codes to display.

> **Note:** The list entered in this attribute is in the format of "lookup_code1|lookup_code2|...". The Lookup Code, not the meaning, is used and no embedded blanks are allowed. Separate each lookup code with the "|".

The list entered in this attribute is the inclusion list, in other words, the codes entered here will be included for display. If all the lookup codes

are to be displayed, you can either leave this attibute empty, or enter ”All” or ”ALL”.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Termination – Update Page

Region Code	Region Name
HR_TERMINATION_TOP_SS	Termination
HR_TERMINATION_DETAIL_SS	Termination Details

Termination – Review Page

Region Code	Region Name
HR_TERMINATION_REVIEW_SS	Termination Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_TERMINATION_ DETAIL_SS	Termination Details	HR Instruc-tion	Long Message	HR_INST_TER-MINATION

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_TERMINATION_DETAIL_SS	Termination Details	HR Persion of Service Flex	PER_PERIODS_OF_SERVICE

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Work Schedule

The Work Schedule workflow process enables a manager to change an employee's work schedule and employment category. A work schedule is the number of days and hours worked and the start and end times for the employee. The employment category defines the type of employment, for example, full and part–time employment.

Note: Part of the Work Schedule page information is displayed from the Soft Coded Key Flexfield.

See Configuring Flexfields: page 7 – 5

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Work Schedule V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Work Schedule – Update Page

Region Code	Region Name
HR_WORK_SCHED_TOP_SS	Work Schedule Page
HR_WORK_SCHED_REC_SS	Work Schedule
HR_EMPLOYMENT_TYPE_SS	Employment Type

Work Schedule – Review Page

Region Code	Region Name
HR_WORK_SCHED_REVIEW_SS	Work Schedule Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_WORK_SCHED_REC_SS	Work Schedule	HR Instruction	Long Message	HR_INST_WORK_SCHED_MAIN
HR_WORK_SCHED_REC_SS	Work Schedule	HR_NORMAL_START_TIME	Short Tip	HR_TIP_WORK_START_TIME
HR_WORK_SCHED_REC_SS	Work Schedule	HR_NORMAL_END_TIME	Short Tip	HR_TIP_WORK_END_TIME

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_WORK_SCHED_REC_SS	Work Schedule	Work Sched Key Flex	SCL
HR_WORK_SCHED_REC_SS	Work Schedule	Work Sched Desc Flex	PER_ASSIGNMENTS

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Change Location

The Change Location function enables a manager to change an employee's work location.

The Change Location Function is available under the predefined Manager responsibility. If required, you can set up approvals processes for the Change Location function.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Location V4.0

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Location V4.0	Location V4.0	Hr Null Allowed
Location V4.0	Location V4.0	HR Location Required
Location V4.0	Location V4.0	Hr Use Defaults
Location V4.0	Location V4.0	Hr Override Defaults
Location V4.0	Location V4.0	HR Element Warning

HR Null Allowed:

Allows null location for an employee.

HR Location Required:

Defines whether the location is required for an employee.

HR Use Defaults:

The location can be changed to the default locations which are the user's Organization Location or Position Location. This is enforced by displaying the locations in a poplist.

HR Override Defaults:

The location can be changed to any global location or any location in the user's business group. The locations are displayed in a list of values if this attribute is called.

HR Element Warning:

Defines whether or not to display the HR element warning.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Location Update Page

Region Code	Region Name
HR_CHANGE_LOCATION_TOP_SS	Location
HR_CHANGE_LOCATION_SS	Change Location
HR_LOCATION_SS	Location
HR_CHANGE_LOCATION_LOV_SS	Location LOV

Location Review Page

Region Code	Region Name
HR_CHANGE_LOCATION_REVIEW_SS	Change Location Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_CHANGE_LOCATION_SS	Change Location	HrInstruction	Long Message	HR_INST_CHANGE_LOCATION

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_LOCATION_SS	Location	Location Address	Address Location
HR_LOCATION_SS	Location	Assignment Flex-field	PER_ASSIGNMENTS

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Special Information Types (SITs)

Special Information Types (SITs) enable you to store additional information that is not currently captured by the system. The additional information is stored in categories. You can store additional information about jobs, positions, skills, and people. There are also two US–specific categories of information: OSHS and ADA.

The SITs are stored in the Personal Analysis Flexfield key flexfield structure. The categories are stored in the PER_SPECIAL_INFORMATION_TYPE_USAGES table.

SITs are dated but not date–tracked. This means that the start and end date fields are included in the user interface.

SITs can have multiple records for each type. For example, a SKILL SIT for Employment Qualifications would usually contain many records.

Each type of information within a category (for example, the ADA disability information within the ADA category) becomes the region header. You can then add additional region items and buttons, for example, Add Another Row.

To enable the SIT to be accessible from the person forms using a taskflow, they must have the category type 'OTHER'. This ensures that the SIT has the key flex form items and calls to maintain the data in the PER_ANALYSIS_CRITERIA table (holds the key flex combination) and the PER_PERSON_ANALYSES table (holds the employee records). SSHR currently only supports SITs with the category 'OTHER'.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Special Information Types V4.0

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
	Set Initial Save for Later	HR_TRANSACTION_SS.SET_INITIAL_SAVE_FOR_LATER
	SIT V4.0	WF_STANDARD.BLOCK

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
	SIT Update V4.0	WF_STANDARD.BLOCK
	Removes a transaction	HR_TRANSACTION_WEB_ROLLBACK_TRANSACTION
	Review Page V4.0	HR_WORKFLOW_SERVICE.BLOCK
	Confirmation Page V4.0	HR_WORKFLOW_SERVICE.BLOCK
	Cancel Activity V4.0	HR_WORKFLOW_SERVICE.BLOCK
	Back Activity Page JSP	HR_WORKFLOW_SERVICE.BLOCK

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Special Information Types Page

Region Code	Region Name
HR_PERSON_SIT_TOP_SS	Special Personal Information Page
HR_PERSON_SIT_MAIN_SS	Special Information Type Page
HR_PERSON_SIT_DETAILS_SS	Special Person Information Type Details

SIT Update Page

Region Code	Region Name
HR_PERSON_SIT_UPDATE_TOP_SS	Special Information Type Update Top Page
HR_PERSON_SIT_UPDATE_SS	Special Information Type Update Page

Review Page

Region Code	Region Name
HR_PERSON_SIT_REVIEW_SS	

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

Other Employment Information

The Other Employment Information module enables you to store assignment and employment information in descriptive flexfields and Developer Descriptive Flexfields (DDFs).

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Other Employment Info V4.0

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Other Employment Information Page

Region Code	Region Name
HR_OTHER_EMPLOY_INFO_TOP_SS	Other Employment Information
HR_OTHER_EMPLOYMENT_INFO_SS	Other Employment Information
HR_COLLECTIVE_AGREEMENTS_SS	Collective Agreements
HR_CAGR_SS	CAGR
HR_ASSIGNMENT_INFO_SS	Assignment Info
HR_CONFIGURABLE_PAY_INFO_SS	Configurable Pay Info
HR_COLLECTIVE_AGREEMENTS_LOV_SS	Collective Agreements LOV
HR_CONTRACT_LOV_SS	Contract LOV

Region Code	Region Name
HR_CAGR_GRADE_LOV_SS	CAGR Grade LOV
HR_ESTABLISHMENT_LOV_SS	Establishment LOV

Other Employment Information Review Page

Region Code	Region Name
HR_OTHEREMPINFO_REVIEW_SS	Other Employment Info Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_OTHER_EMPLOYMENT_INFO_SS	Other Employment Info	HR Instruction	Long Message	HR_INST_TOP_COMMON_TEXT

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_CAGR_SS	CAGR	CAGR Key Flex	CAGR
HR_ASSIGNMENT_INFO_SS	Assignment Info	Assignment Flexfield	PER_ASSIGNMENTS

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Pay Rate

You use the Pay Rate module in the Work Schedule workflow process to enable a manager to change an employee's overall pay rate directly (Single Pay Rate) or to create component increases to the previous rate (Multiple Pay Rate). You can change pay rates independently of assignment changes or as part of an assignment change.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Pay Rate V4.0

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Pay Rate V4.0	HR_P_RATE_JSP_PRC	Pay Rate V4.0

See: Configuring Workflow Attributes: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Pay Rate Update Page

Region Code	Region Name
HR_P_RATE_TOP_SS	Pay Rate Page
HR_P_RATE_SINGLE_SS	Pay Rate Single
HR_P_RATE_SINGLE_TABLE_SS	Pay Rate Single Table

Region Code	Region Name
HR_P_RATE_MULTIPLE_SS	Pay Rate Multiple
HR_P_RATE_MULTIPLE_TABLE_SS	Pay Rate Multiple Table
HR_P_RATE_MISC_FIELDS_CELL_SS	
HR_P_RATE_MISC_FIELDS_ROW_SS	
HR_P_RATE_MISC_FIELDS_TABLE_SS	Pay Rate Misc Fields Table (Quartile, Compare Ratio, Grade Range, Grade Mid Point, Last Pay Change, Changed On, FLSA Status)
HR_P_RATE_SAL_FLEX_CELL_SS	Pay Rate Salary Admin Flex Cell
HR_P_RATE_SAL_FLEX_ROW_SS	

Pay Rate Review Page

Region Code	Region Name
HR_P_RATE_REVIEW_SS	Pay Rate Review

See: Configuring Web Pages: page 7 – 4

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_P_RATE_SAL_FLEX_CELL_SS	Pay Rate Salary Admin Flex Cell	PayRate Salary Admin Flex	PER_PAY_PROPOSALS
HR_P_RATE_MULTIPLE_TABLE_SS	Pay Rate Multiple Table	PayRate Proposal Component Flex	PER_PAY_PROPOSAL_COMPONENTS

See: Configuring Flexfields: page 7 – 5

Change Manager

The Change Manager workflow process enables a manager to transfer an employee to another manager, move the direct reports of one manager to another manager and to assemble a new set of direct reports to a new manager. A new manager can be appointed from inside or outside a security domain.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Manager V4.0

Configurable Workflow Attributes:

Not applicable

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
		HR_TERM_SUP_FLAG
Change Manager V4.0	Change Manager V4.0	HR_MANAGER_RE-QUIRED_INDICATOR

HR_TERM_SUP_FLAG

This item–level attribute is used when the Change Manager page is invoked from the Termination page. If the attribute is set to yes, only the Direct Reports region is displayed.

HR_MANAGER_REQUIRED_INDICATOR

If this attribute has a value of ”Y”, the employee must have a manager. If this attribute has a value of ”N”, the supervisor_id field of the per_all_assignments_f record can remain blank.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Supervisor Page

Region Code	Region Name
HR_MANAGER_TOP_SS	Manager (Top Region)
HR_MANAGER_SS	Manager Update
HR_NEW_MANAGER_SS	New Manager
HR_DIRECT_REPORT_SS	Direct Report of Selected Employee
HR_NEW_DIRECTREPORT_SS	New Direct Reports
HR_LIST_OF_EMPLOYEES_SS	List of all Employees
HR_DIRECTREPORTS_TABLE_SS	Direct Reports of an Employee
HR_NEW_DIRECTREPORTS_TABLE_SS	New Direct Reports
HR_NEWMANAGER_LOV_SS	List of all Employees in the Add New Direct Reports Region
HR_MANAGER_REVIEW_SS	Manager Review

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_NEW_MANAGER_SS	New Manager	HR Instruction		HR_INST_SUPERVISOR_MAIN
HR_DIRECTREPORT_SS	Direct Reports of Selected Employee	HR Instruction 1		HR_INST_SUPERVISOR_DIRECT
HR_NEW_DIRECTREPORT_SS	New Direct Reports	HR Instruction		HR_INST_SUPERVISOR_NEW_DIRECT

Region ID	Region Name	Attribute Name	Tip Type	Message Name
HR_DIRECTREPORTS_TABLE_SS	Direct Reports	Effective Transfer Date	Long Message	HR_TIP_SUPERVISOR_DR_DATE
HR_NEWDIRECTREPORTS_TABLE_SS	New Direct Reports	Effective Transfer Date	Long Message	HR_TIP_SUPERVISOR_NDR_DATE

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

CHAPTER

12 HR Views

Overview

The HR Views module is intended to be used by HR Professionals. It offers a summarized view of different aspects of employee information: Personal Information, Assignment Details, Compensation Activity, and Termination History.

Each area of information is displayed on separate pages. From each page, the user can simply click a button and display different information.

All information displayed in the HR Views is for viewing only. To modify the information displayed, the user would have to log on with the Manager Self Service V4.0 responsibility.

The HR Views functionality is reached using the HR User Self Service responsibility and the HR Views function.

> **Note:** Only use the HR Views functionality with the HR Professional V4.0 responsibility. Do not add the HR Views function to the Manager or Employee responsibilities.

The following chapter outlines the technical information for the separate HR Views pages.

The Views functions are displayed on tabbed regions. For information on configuring tabbed regions, see: Configuring Tabbed Regions: page 7 – 6.

Personal Information View

The Personal Information view displays the details relevant to an employee. This information need not relate to their job or employment contract.

The Personal Information page displays any specific fields which you have defined as flexfields and can also display a country–specific section which will display localization fields, for example, the national identifier or visa information.

All the information in the Personal Information view relates to the current record for the employee and no history is displayed.

> **Note:** If the employee has been rehired, the SSHR application displays the last termination date.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee / Personal Information

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Personal Information Page

Region Code	Region Name
HR_VIEW_EPI_TOP_SS	EPI Employee Information View Top
HR_VIEW_EPI_ASSIGNMENT_DTLS_SS	EPI Assignment Details Region

Region Code	Region Name
HR_VIEW_EPI_QUAL_DTLS_SS	EPI Qualification Details Regions
HR_VIEW_EPI_WORK_DTL_SS	EPI Work Detail Region
HR_VIEW_EPI_QUAL_CONTAINER_SS	EPI Qualification Container Region
HR_VIEW_EPI_PER_CONTACT_DTL_SS	EPI Contact Detail Region
HR_VIEW_EPI_FURTHER_PER_INF_SS	EPI Further Person Information
HR_VIEW_EMPLOYEE_DTL_SS	EPI Employee Detail Region
HR_VIEW_EPI_DESCFLEX_SS	EPI Descriptive Flexfield Region
HR_VIEW_EPI_ADDTNL_PER_DTL_SS	EPI Additional Person Details
HR_VIEW_EPI_ADDRESS_DTL_SS	EPI Address Detail Region

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_EPI_ADDRESS_DTL_SS	EPI Address Detail Region	hraddressflex	Address Structure
HR_VIEW_EPI_ADDRESS_DTL_SS	EPI Address Detail Region	hraddressflex2	Address Structure
HR_VIEW_EPI_ADDTNL_PER_DTL_SS	EPI Additional Person Details	Additional Personal Details Flex	PER_PEOPLE
HR_VIEW_EPI_FURTHER_PER_INF_SS	EPI Further Person Information	Further Person Information Flex	Person Developer DF

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Assignment Details View

The Assignment Details view displays the assignment information for a particular employee. The HR Professional can display the different employee assignments, including the information set up in customer flexfields.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Assignment Details

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Assignment Details Page

Region Code	Region Name
HR_VIEW_AD_TOP_SS	AD Assignment Details View Top
HR_VIEW_AD_HISTORY_OVERVIEW_SS	AD Assignment History Overview Region
HR_VIEW_AD_HISTORY_DETAIL_SS	AD Assignment History Detail Region

Region Code	Region Name
HR_VIEW_AD_HISTORY_CONTAIN_SS	AD Assignment History Container Region
HR_VIEW_AD_GENERAL_DTL_SS	AD General Detail Region
HR_VIEW_AD_FURTHER_PER_INF_SS	AD Further Person Information
HR_VIEW_ADD_FORM_CONTAINER_SS	AD Assignment Details View Form Container
HR_VIEW_AD_EMPLOYEE_DTL_SS	AD Employee Detail Region
HR_VIEW_AD_DESCFLEX_SS	AD Descriptive Flexfield Region
HR_VIEW_AD_CUR_ASSIGNMENT_SS	AD Current Assignment Region
HR_VIEW_AD_ASS_SELECT_SS	AD Assignment Selection Region
HR_VIEW_AD_ADDTNL_PER_DTL_SS	AD Additional Person Details
HR_VIEW_AD_ADDASS_FLEX_SS	AD Additional Assignment Details Desc Flex Region

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_AD_CUR_ASSIGNMENT_SS	AD Current Assignment Region	HR Job Key Flex	Job Flexfield
HR_VIEW_AD_CUR_ASSIGNMENT_SS	AD Current Assignment Region	HR Position Key Flex	Position Flexfield
HR_VIEW_AD_CUR_ASSIGNMENT_SS	AD Current Assignment Region	HR Grade Key Flex	Grade Flexfield
HR_VIEW_AD_ADD ASS_FLEX_SS	AD Additional Assignment Details Desc Flex Region	Assignment Flex Field	PER_ASSIGNMENTS
HR_VIEW_AD_FURTHER_PER_INF_SS	AD Further Person Information	Further Person Information Flex	Person Developer DF
HR_VIEW_AD_ADDTNL_PER_DTL_SS	AD Additional Person Details	Additional Personal Details Flex	PER_PEOPLE

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_AD_HISTORY_DETAIL_SS	AD Assignment History Detail Region	HR Job Key Flex	Job Flexfield
HR_VIEW_AD_HISTORY_DETAIL_SS	AD Assignment History Detail Region	HR Position Key Flex	Position Flexfield
HR_VIEW_AD_HISTORY_DETAIL_SS	AD Assignment History Detail Region	HR Grade Key Flex	Grade Flexfield

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Compensation Activity View

The Compensation activity view displays the salary and benefits information for an employee.

> **Note:** The self–service Manager views also contain a Salary Information view although this view does not contain information on the employee's benefits.

The Compensation Activity view displays all the elements for an employee unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Compensation Activity

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Compensation Activity Page

Region Code	Region Name
HR_VIEW_CA_TOP_SS	CA Compensation Activity View Top
HR_VIEW_CA_COMP_ELEMENTS_SS	CA Compensation Elements Region

Region Code	Region Name
HR_VIEW_CA_COMP_RATES_SS	CA Compensation Rates Region
HR_VIEW_CA_ADDASS_FLEX_SS	CA Additional Assignment Details Desc Flex Region
HR_VIEW_CA_ADDSAL_FLEX_SS	CA Additional Salary Details Desc Flex Region
HR_VIEW_CA_ADDTNL_PER_DTL_SS	CA Additional Person Details
HR_VIEW_CA_COMP_CONTAINER_SS	CA Compensation Container Region
HR_VIEW_CA_DESCFLEX_SS	CA Descriptive Flexfield Region
HR_VIEW_CA_EMPLOYEE_DTL_SS	CA Employee Detail Region
HR_VIEW_CA_FURTHER_PER_INF_SS	CA Further Person Information
HR_VIEW_CA_GENERAL_DTL_SS	CA General Detail Region
HR_VIEW_CA_SALARY_DTL_SS	CA Salary Detail Region
HR_VIEW_CA_WORK_DTL_SS	CA Work Detail Region

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_CA_WORK_DTL_SS	CA Work Detail Region	HR Job Key Flex	Job Flexfield
HR_VIEW_CA_WORK_DTL_SS	CA Work Detail Region	HR Position Key Flex	Position Flexfield
HR_VIEW_CA_WORK_DTL_SS	CA Work Detail Region	HR Grade Key Flex	Grade Flexfield

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_CA_ADDSAL_FLEX_SS	CA Additional Salary Details Desc Flex Region	Salary Flex	PER_PAY_PROPOSALS
HR_VIEW_CA_ADDTNL_PER_DTL_SS	CA Additional Person Details	Additional Personal Details Flex	PER_PEOPLE

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Not applicable

Termination History View

The Termination History view displays any termination history for an employee. If an employee's contract is terminated and the employee is subsequently rehired, the application updates the information displayed in the view so that the employee is not displayed as *Terminated*.

The employee's record may contain more that one termination, for example, if they have been rehired more than once.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
HR Views	View Employee Termination History

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Termination History Page

Region Code	Region Name
HR_VIEW_TH_TOP_SS	TH Termination History View Top
HR_VIEW_TH_ADDPDS_FLEX_SS	TH Additional Periods of Service Desc Flex Region

Region Code	Region Name
HR_VIEW_TH_ADDASS_FLEX_SS	TH Additional Assignment Details Desc Flex Region
HR_VIEW_TH_ADDTNL_PER_DTL_SS	TH Additional Person Details
HR_VIEW_TH_DESCFLEX_SS	TH Descriptive Flexfield Region
HR_VIEW_TH_EMPLOYEE_DTL_SS	TH Employee Detail Region
HR_VIEW_TH_FURTHER_PER_INF_SS	TH Further Person Information
HR_VIEW_TH_INFPDS_FLEX_SS	TH Additional Periods of Service Information Desc Flex Region
HR_VIEW_TH_TERM_DTL_SS	TH Termination Detail Region
HR_VIEW_TH_WORK_DTL_SS	TH Work Detail Region

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_TH_WORK_DTL_SS	TH Work Detail Region	HR Job Key Flex	Job Flexfield
HR_VIEW_TH_WORK_DTL_SS	TH Work Detail Region	Hr Position Key Flex	Position Flexfield
HR_VIEW_TH_WORK_DTL_SS	TH Work Detail Region	HR Grade Key Flex	Grade Flexfield
HR_VIEW_TH_ADDTNL_PER_DTL_SS	TH Additional Person Details	Additional Personal Details	PER_PEOPLE
HR_VIEW_TH_FURTHER_PER_INF_SS	TH Further Person Information	Further Person Information Flex	Person Developer DF
HR_VIEW_TH_ADDPDS_FLEX_SS	TH Additional Periods of Service Desc Flex Region	Per Periods of Service	PER_PERIODS_OF_SERVICE

Region ID	Region Name	Attribute Name	FlexField Name
HR_VIEW_TH_INFPDS_FLEX_SS	TH Additional Periods of Service Information Desc Flex Region	Per Periods of Service	PER_PDS_DEVELOPER_DF
HR_VIEW_TH_ADDASS_FLEX_SS	TH Additional Assignment Details Desc Flex Region	Assignment Flexfield	PER_ASSIGNMENTS

See: Configuring Flex Segments: page 7 – 5

Configurable Profile Options

Not applicable

Search Functions for HR Views

The first Search function for HR Views is displayed when an HR Professional selects the HR Views option from the self–service menu (when using the HR User Self Service responsibility). At this point, the user can only search for an employee.

The second Search function for HR Views is displayed when the HR Professional has searched for an employee. At this point, the user can either view data for the selected employee or search for another employee.

Menu and Function Names

These modules can be accessed from the following menus and functions:

User Menu Name	Function Name
HR User Self Service (HR_USER_SELF_SERVICE_V4.0)	HR Views Person Search Initial Screen
HR Views Menu (HR_VIEWS_MENU)	HR Views Person Search

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Search Functions

Region Code	Region Name
HR_SUPER_PERSON_SEARCH_TOP1_SS	HR User Person Search

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

CHAPTER

13 Benefits and Individual Compensation Distributions

Self–Service Benefits Enrollments

Self–Service Benefits supports a variety of enrollment types, including open, unrestricted, and life event enrollments for one or more flex or non–flex programs.

The enrollment choices, price tags, and other information in Self–Service Benefits web pages are derived from Oracle Applications database tables using the rules of your plan design. To implement Self–Service Benefits, you need to match your current business set up in Oracle HRMS for self–service use.

Self–Service Benefits supports enrollment for plans and options in a program. Use Oracle's professional forms interface or the self–service Individual Compensation Distribution web pages to enroll participants in all plans not in a program such as savings plans, Employee Stock Purchase Plans (ESPP), or 401(k) plans.

Self–Service Benefits Enrollment Functionality

Self–Service Benefits offers an employee the opportunity to:

- Review current program benefits enrollments
- Select benefits
- Distribute excess flex credits (Advanced Benefits)
- Add, update, or review family member information

  Note: Family member information entered through the self–service interface and personal contact data entered through the professional forms interface share the same table. Any data entered or updated in Self–Service HRMS or the professional forms interface is reflected in both interfaces.
- Add, update, or remove dependents
- Add, update, or remove beneficiaries (You cannot enter organizations as beneficiaries in Self–Service at this time.)

  Note: Self–Service requires dependents and beneficiaries to have the personal relationship check box checked on the Contacts window.
- Search for and select primary care providers
- Print a temporary participant identification card

Plan Design Considerations for Self–Service Benefits

Before eligible participants can enroll in a benefit plan using the self–service interface, you must design your plan using Oracle's

professional forms interface. The following topics look at the points you should consider when designing your plan for the self–service environment.

Legislative Configurations

Self–Service Benefits is delivered with US–style formatting for the following fields:

- Address
- Social Security Number
- Pre Tax Cost
- After Tax Cost

For non–US self–service implementations, you can edit field labels to fit your legislative requirements and you can also hide and unhide fields. For example, you may want to hide the list of States from the address fields when entering family members.

> **Note:** Self–Service Benefits inherits the address style and country used by the primary benefits participant.

If your legislation or benefits plan design does not allow for after tax contributions, consider hiding the after tax columns on the tables contained in the following web pages:

- Benefits Enrollment Overview
- Current Benefits Overview
- Benefits Selection
- Confirmation

See: Setting Up Self–Service Benefits Web Pages: page 13 – 10

See: Benefits Enrollments: page 13 – 15 for a list of the configurable user interface elements in each delivered web page.

Setting the Horizontal or Vertical Display of Plan Types, Plans, and Options

Navigate to the Plan Types window in the professional forms user interface to set the table display format of electable compensation and benefits options.

Use a horizontal display for medical, dental, and vision plan types. A horizontal display:

- Lists options horizontally across the columns of a table
- Limits enrollment to a maximum of one plan per plan type

- Is **not** used with plans that calculate coverage amounts, such as life insurance plans
- Requires the definition of a *waive plan*

	Employee Only	Employee Plus One	Employee Plus Family
Plan A	120	150	180
Plan B	130	160	190
Waive Plan			

Using the radio buttons in the Self–Service interface, a participant can select only one plan and option combination at a time. The waive plan provides a means of indicating that no coverage is selected in the plan type.

Use a vertical display (the default value if you make no selection) for plan types other than medical, dental, and vision. Plans with more than four options—such as insurance plans—use a vertical display to prevent unnecessary horizontal scrolling in the browser window. A vertical display:

- Lists options vertically in the column of a table
- Enables the election of multiple plans in a plan type
- Is used for plans that calculate coverage amounts, such as life insurance plans
- Must have a *waive option*

Plan A	**Coverage**	**Cost**
Option 1x Salary	50,000	.75
Option 2x Salary	100,000	1.50
Option 3x Salary	150,000	2.25
Waive Option		
Plan B		
Option 1x Salary	50,000	.40
Waive Option		

Using the radio buttons in the Self–Service interface, a participant can select more than one plan and option combination in the plan type, but only one option within a plan at a time. The waive option provides a means of indicating that no coverage is selected within a plan.

See: Declining Coverage: page 13 – 6

See: Defining Plan Types, *Managing Total Compensation Using Oracle HRMS*

Flexible Spending Accounts (US)

To ensure that your qualifying participants can enroll in Flexible Spending Account (FSA) plans using Self–Service Benefits, you must set up your plans using the following method.

Use the Plan Types window to define one plan type for each FSA plan. For example, define one plan type for Dependent Care FSA plans and a second plan type for Health Care FSA plans. For each plan type, you define the flexible spending account plan or plans into which participants and their dependents can enroll. You also define a **decline** plan which you link to each plan type.

Other items for consideration:

- Select a Self–Service Display of Vertical for the Plan Type
- You enable a participant to enter an annual coverage amount during enrollment by checking the Enter Value at Enrollment field in the Calculation Method region of the Coverage Calculations window when you define the coverage calculation for the FSA plan.
- Define any minimum or maximum annual coverage amounts or coverage increments.
- Use the Standard Rates window to define the payroll contribution by selecting a calculation method of Set Annual Rate Equal to Coverage for the FSA plan.
- Check the Display on Enrollment and Assign on Enrollment check boxes.

Flexible Benefits Programs (Advanced Benefits)

With Flexible Benefits Programs, you can offer flex credits to eligible participants to offset the cost of benefits.

When you define a benefit program in the Programs window, select the same periodicity for the activity reference period (the time period in which the system expresses activity rates) and the enrollment rate frequency (the activity rate that is communicated to participants). You must select either per month or per year. This ensures that the application expresses benefit price tags and available flex credits to participants for the same time period.

> **Note:** Self–Service Benefits only displays the enrollment rate frequency to the end–user; the activity reference period does not display.

Other items for consideration:

- Unless your flex credits are determined using the result of a calculation, you indicate the number of flex credits associated with a

compensation object by entering the value in the Flat Amount field in the Calculation Method region of the Flex Credits window.

- You must set up a flex credits *placeholder plan* and link this plan to the flex program. This plan records the total flex credits for the program. Define a rate for this plan by entering zero in the Flat Amount field of the Calculation Method region of the Standard Rates window.
- Set the processing type of the corresponding element to Recurring.

Temporary Participant Identification Cards

A temporary identification card allows a participant to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider. Using Self–Service Benefits, a participant can print one card for each elected plan which allows for temporary identification cards. The participant can also print a card for each covered dependent.

The application generates a temporary ID card upon:

- Enrollment
- Re–enrollment
- Change in Enrollment
- Participant Request (due to loss)

The identification card includes information such as:

- Employee Name and Social Security Number
- Member Name and Social Security Number (for dependents)
- Employer Name
- Plan Name

You indicate that a plan allows for the printing of temporary ID cards by checking the Allow Temporary Identification field on the Plans window.

Declining Coverage

Depending on your plan design, you must set up either a decline coverage plan or option that allows a participant to waive an enrollment opportunity for which they are otherwise eligible.

If a plan type contains multiple plans, you create a *decline coverage plan* in the Plans window (in addition to the regular plans) and indicate that the plan is of the specified plan type. If a plan type has only one plan, you define a *decline coverage option* and link it to the plan. This ensures that participants can either select or decline benefit coverage.

A typical plan design features a decline coverage plan for medical, dental, and vision plans, and a decline coverage option for insurance plans.

> **Note:** If your plan design *requires* that a participant select at least one option from a group of options or at least one plan from a group of plans, do not define a decline coverage plan or option.

Setting Up Self–Service Benefits Enrollments

You must complete your plan design in the professional forms interface before you can view a self–service benefits enrollments web page. If you license Advanced Benefits, you can run the Participation Batch Process from the Concurrent Manager to create electable choices for eligible participants.

If you use Standard Benefits, or if you are an Advanced Benefits customers using the **unrestricted** enrollment method, you can begin to allow participant enrollments after you create your plan design. The application creates the self–service enrollment page when the person logs into Self–Service Benefits.

▶ **To set up self–service benefits enrollments:**

1. Review the sample benefits web pages. You can configure the following elements using the Configuration Framework:

   - Section titles
   - Table Layout
   - Hints
   - Tips
   - Field labels

   See: Configuring Web Pages: page 7 – 4

2. Define instruction text for each web page region. You do this by defining a communication type and associating the instruction text with a web page Region.

   See: Defining Communication Types, *Managing Total Compensation Using Oracle HRMS*

   You can include a link in your instruction text to another web site using HTML syntax. You could create a link to reference information contained in a summary plan description. For example:

   See the Vision Medical web site for more information.

   In this example, the application opens the web page in a new browser window.

3. Define when you want the instruction text displayed. You can vary the instruction displayed according to:

- Program
- Plan Type
- Plan
- Life Event (Advanced Benefits)

See: Defining When to Use a Benefits Communication: page 13 – 38

4. Create a hypertext link from a compensation object to a web page which describes that program, plan type in program, plan in program, plan, or option in plan. To create a hypertext link, use one or more of the following windows:

   - Programs (for a program)
   - Plan and Plan Type window (for a plan or a plan type in program)
   - Plans window (for a plan)
   - Maintain Plan Options window (for an option in a plan)

   The link appears in the Benefits Selection web page, or—for Programs—the Overview page.

   See: Defining a Benefits Program, *Managing Total Compensation Using Oracle HRMS*

5. Review Messages and change any that do not meet your requirements.

6. Configure Action Item messages (Advanced Benefits) to meet your requirements.

   The application displays Action Item messages at the end of the enrollment process on the Confirmation page.

   See: Enrollment Action Types, *Managing Total Compensation Using Oracle HRMS*

7. Configure whether benefits participants have the option to select a Primary Care Provider (PCP) for a benefits plan.

   See: Maintaining Primary Care Providers for a Plan: page 13 – 30

8. Configure whether you want benefits participants to have access to the Primary Care Provider Search facility.

   See: Configuring the Primary Care Provider Search Facility: page 13 – 33

Setting Up Self–Service Benefits Web Pages

This topic explains how to to configure the appearance of your web pages using the Web Applications Dictionary (AK Dictionary), Function security, and the Configuration Framework.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

To access the Web Applications Dictionary, log on to Oracle HRMS with an AK Developer responsibility and open the Regions window.

See: Benefits Enrollments: page 13 – 15 for more information about configurable items, such as help tips.

> **Note:** All data changes entered in the Web Applications Dictionary require you to restart the Apache web server to see your changes.

▶ **To set up self–service benefits web pages:**

1. If you create a new submenu, you must update the AK regions which point to the submenu.

   The Benefits Self Service submenu controls the tabs—Benefits Enrollment and Current Benefits—that appear on a number of the enrollment web pages.

   Because the submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The functions you link to this submenu map to the tabs. The submenu prompts appear as the function labels.

   Complete steps 2 to 7 to update the region items, or proceed to step 8 if you do not intend to create any new submenus.

   See: Configuring Tabbed Regions: page 7 – 6

2. Using an AK Developer responsibility, log on to the application.
3. Open the Regions window.
4. Query one of the following regions in the Region ID field:
   - BEN_BENEFICIARY_PAGE
   - BEN_CURR_OVW_PAGE
   - BEN_ENRL_CONF_PAGE
   - BEN_ENRL_DEPENDENTS_PAGE
   - BEN_ENRL_OVERVIEW_PAGE

- BEN_ENRT_SELECTION_PAGE
- BEN_FAMILY_MBRS_PAGE
- BEN_FAM_ADD_PAGE
- BEN_PCP_SEARCH_PAGE
- BEN_PCP_SELECT_PAGE
- BEN_UNUSED_FLEX_CREDIT_PAGE

5. Choose the Region Items button to open the Region Items window.
6. In the Attribute Name column, select the Application Menu entry.
7. Scroll to the Menu Name column and update the field with the new menu as entered in the Menu field of the Menus window.
8. If you customize the seeded functions—BEN_SS_BNFT_ENRT or BEN_SS_MNGR_ENRT—you must update your custom function to use the seeded parameters and HTML Calls.

   Note: It is a good practice to check the Readme for each Self–Service Benefits patch you apply to see if the parameters and HTML Calls for the seeded functions have changed.

9. During implementation you can choose whether to display the following hidden attributes by selecting the Node Display check box for the corresponding region.

Attribute	Region	Web Page	Description
Taxable Cost	BEN_OVW_SELECTIONS_TABLE	Benefits Enrollment Overview; Confirmation Page	Use this attribute to display a column for the taxable cost of a benefit. **Note**: This column corresponds to a standard rate with an activity type of Self–Service Display.
Address Line 1, Address Line 2, Address Line 3	BEN_FAM_ADD_ADDRESS	Family Members and Others Detail Page	Use this attribute to configure non–US style address fields.
ICX Bucket3	BEN_ENRL_CONF_CONTENT	Confirmation Page	Use this attribute to add a region for a participant's signature.

Note: Use the Taxable Cost attribute for miscellaneous values. This amount displays on the overview and confirmation pages, but not on the Benefits Selection Page.

10. Query a region of the web page you are configuring in the Region ID field of the Regions window.

    See: Benefits Enrollments: page 13 – 15 for a list of regions, tables, hints, and tips that you can configure.

11. Choose the Region Items button.

12. Select the Attribute Name for which you are editing a section title, hint, tip, table, or other information.

13. Enter new text in the Long Label column.

14. Select the Node Display check box to display an attribute in a Self–Service web page.

15. To reorder the sequence of columns in a table, change the sequence number of the column and increment that number by one. You can then save your new sequence, decrement the sequence number by one within each region, and save again. Reordering the sequence number of the table columns enables you to maintain the original sequence number.

Setting Up User Access to Self–Service Benefits

Self–Service Benefits functions are attached to the Benefits Self–Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

If you create a new submenu, you must update the AK regions which point to the submenu.

See Setting Up Self–Service Benefits Web Pages: page 13 – 10

See: User's Menu *(Oracle Applications System Administrator's Guide)* for more information on configuring menus.

▶ **To set up user access to self–service benefits:**

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self–Service Menu in the Menu field: HR_EMPLOYEE_DIRECT_ACCESS_WEB. The following Self–Service User Menu Name displays to users:

   - Employee Self–Service V4.0

   You can change the menu name if required.
4. Query the Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:

   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.

   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self–service web page.
5. Create your own Self–Service Benefit functions from the sample functions supplied. The sample User Function Names are:

   - Self Service View Current Benefits

- Self Service Benefits Enrollment

The Function Names are:

- BEN_SS_CURR_BNFT
- BEN_SS_BNFT_ENRT

See: Form Functions Window *(Oracle Applications System Administrator's Guide)*

6. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:

   - HR: Security Profile

     Note: If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

   See: User Profiles (*Oracle Applications User's Guide* and *Oracle Applications System Administrator's Guide*)

7. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:

   - HR: Business Group

8. Define the people you would like to access Self–Service Benefits. There are two ways to do this. You may follow the typical steps for defining a new user and then assign each user to a responsibility that enables access to self–service benefits, one at a time. See: Users Window *(Oracle Applications System Administrator's Guide)*. Or, you can set up concurrent programs to automate this manual process. See the White Paper titled: *Batch Creation of User Accounts* available from MetaLink.

Benefits Enrollments

This topic provides reference information you need to configure your Self–Service Benefit Enrollment web pages.

The tables below list—by web page—the regions that contain the instruction text, tables, hints, tips, and messages that you can modify.

For **instruction text**, the table also lists the communication short name that is required when you define the communication type and the valid communication usages that allow you to target the instruction text to a particular program, plan type, plan, or life event.

See: Setting Up Self–Service Benefits Web Pages: page 13 – 10 for an explanation of how to configure the various regions of the web page.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Benefits Self Service	Benefits Enrollment
Benefits Self Service	Current Enrollment

See: Defining Menus for SSHR: page 5 – 12

Configurable Web Applications Dictionary Regions

The following definitions can be configured in the Configuration Framework:

Region Code	Region Name
BEN_ENRL_OVERVIEW_PAGE	Benefits Enrollment
BEN_CURR_OVW_PAGE	Current Benefits
BEN_FAMILY_MBRS_PAGE	Family Members and Others
BEN_FAM_ADD_PAGE	Ben Family Member Add Page
BEN_ENRT_SELECTION_PAGE	Ben Enrollment Selection Page
BEN_ENRL_DEPENDENTS_PAGE	Dependents
BEN_BENEFICIARY_PAGE	Beneficiaries
BEN_PCP_SELECT_PAGE	Primary Care Providers

Region Code	Region Name
BEN_PCP_SEARCH_PAGE	PCP Search Page
BEN_ENRL_CONF_PAGE	Ben Enrollment Confirmation Page
BEN_UNUSED_FLEX_CREDIT_CONTENT	Unused Flex Credits Content
BEN_EFFECTIVE_DATE_CONTENT	Session Date Content
BEN_ENRL_TEMPID_PAGE	Temporary Identification Card

Benefits Enrollment Overview Page

The Benefits Enrollment Overview web page enables a participant to view a record of their current benefits and to enroll into a new set of benefits.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_OVERVIEW_CONTENT	Enrollment Overview Content	HR Instruction	Instruction	BEO.ENRL_OVERVIEW_CONTENT	Program, Life Event
BEN_FLEX_CREDITS	Flex Credit Instructions	HR Instruction	Instruction	BEO.FLEX_CREDITS	Program, Life Event
BEN_OVERVIEW_FC_SUMMARY	Flex Credit Summary	HR Instruction	Instruction	BEO.OVERVIEW_FC_SUMMARY	Program, Life Event
BEN_FLEX_CREDIT_ROLLOVERS	Flex Credit Rollovers	HR Instruction	Instruction	BEO.FLEX_CREDIT_ROLLOVERS	Program, Life Event
BEN_OVERVIEW_SELECTIONS	Benefit Selections	HR Instruction	Instruction	BEO.OVERVIEW_SELECTIONS	Program, Life Event
BEN_OVERVIEW_CVRD_DEPS	Covered Dependents	HR Instruction	Instruction	BEO.OVERVIEW_CVRD_DEPS	Program, Life Event
BEN_ENRL_OVERVIEW_BENEF	Beneficiary Enrollment Overview	HR Instruction	Instruction	BEO.ENRL_OVERVIEW_BENEF	Program, Life Event
BEN_ENRL_OVERVIEW_PCP	Primary Care Providers Enrollment Overview	HR Instruction	Instruction	BEO.ENRL_OVERVIEW_PCP	Program, Life Event
BEN_ENRL_OVERVIEW_CONTENT	No Enrollment Opportunity: Brief Message	No Enrollment Text	Message #: 92570		—

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_OVERVIEW_CONTENT	No Enrollment Opportunity: Detailed Message	Information Text 1	Message #: 92571		—
BEN_OVW_SELECTIONS_TABLE	Benefits Selections Overview Table	—	—	—	—
BEN_OVW_CVRD_DEPS_TABLE	Covered Dependents Overview Table	—	—	—	—
BEN_OVW_BENEF_TABLE	Beneficiaries Overview Table	—	—	—	—
BEN_OVW_PCP_TABLE	Primary Care Provider Overview Table	—	—	—	—

Current Benefits Overview Page

The Current Benefits Overview web page enables a participant to see a record of their current benefits.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_CURR_OVW_CONTENT	Current Benefits Overview Content	HR Instruction	Instruction	CBO.CURRENT_OVERVIEW_CONTENT	Program
BEN_FLEX_CREDITS	Flex Credits	HR Instruction	Instruction	CBO.FLEX_CREDITS	Program
BEN_OVERVIEW_FC_SUMMARY	Flex Credit Summary	HR Instruction	Instruction	CBO.OVERVIEW_FC_SUMMARY	Program
BEN_FLEX_CREDIT_ROLLOVERS	Flex Credit Rollovers	HR Instruction	Instruction	CBO.FLEX_CREDIT_ROLLOVERS	Program
BEN_OVERVIEW_SELECTIONS	Benefit Selections	HR Instruction	Instruction	CBO.OVERVIEW_SELECTIONS	Program
BEN_OVERVIEW_CVRD_DEPS	Covered Dependents	HR Instruction	Instruction	CBO.OVERVIEW_CVRD_DEPS	Program
BEN_ENRL_OVERVIEW_BENEF	Beneficiary Enrollment Overview	HR Instruction	Instruction	CBO.ENRL_OVERVIEW_BENEF	Program
BEN_OVERVIEW_PCP	Primary Care Providers Overview	HR Instruction	Instruction	CBO.OVERVIEW_PCP	Program

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_CURR_OVW_CONTENT	No Current Enrollment Brief Message	No Current Benefits Text	Message #: 92572		—
BEN_CURR_OVW_CONTENT	No Current Benefit Detail Message	Information Text 1	Message #: 92573		—
BEN_OVW_SELECTIONS_TABLE	Benefits Selections Overview Table	—	—	—	—
BEN_OVW_CVRD_DEPS_TABLE	Covered Dependents Overview Table	—	—	—	—
BEN_OVW_BENEF_TABLE	Beneficiaries Overview Table	—	—	—	—
BEN_OVW_PCP_TABLE	Primary Care Provider Overview Table	—	—	—	—

Family Members and Others and Family Members and Others Detail Page

The Family Members and Others page enables a participant to review a record of their family members and other persons enrolled as dependents or beneficiaries of their benefits. Benefits participants can add another person to the Family Members and Others table by choosing the Add Another Person button. This opens the Family Members and Others Details page.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_FAMILY_MBRS_PAGE	Family Members & Others			—	—
BEN_FAMILY_MEMBER_CONTENT	Family Members Content	HR Instruction	Instruction	FML.FAMILY_MBRS_CONTENT	Program, Life Event
BEN_FAMILY_MBRS_CONTENT	Family Members Table Tip	Help Tip	Tip		
BEN_FAMILY_MBRS_CONTENT	Family Members Table			—	—

Summary Page

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_FAM_ADD_PAGE	Ben Family Member Add Page			—	—
BEN_FAM_ADD_CONTENT	Add or Update Family Members	HR Instruction	Instruction	FML.FAM_ADD_CONTENT	Program, Life Event
BEN_FAM_ADD_NAME	Name and Relationship	HR Instruction	Instruction	FML.FAM_ADD_NAME	Program, Life Event
BEN_FAM_ADD_ADDRESS	Address	HR Instruction	Instruction	FML.FAM_ADD_ADDRESS	Program, Life Event
BEN_FAM_ADD_OTHER	Misc Information	HR Instruction	Instruction	FML.FAM_ADD_OTHER	Program, Life Event
BEN_FAM_ADD_SECOND_MEDICAL	Second Medical Coverage	HR Instruction	Instruction	FML.FAM_ADD_SECOND_MEDICAL	Program, Life Event
BEN_FAM_ADD_ADDRESS	Address Warning Tip	Information Text 1		—	—
BEN_FAM_ADD_NAME	Suffix Hint	HR_SUFFIX		—	—
BEN_FAM_ADD_ADDRESS	Postal Code Hint	Postal Code		—	—
BEN_FAM_ADD_OTHER	National Identifier Hint	National Identifier		—	—
BEN_FAM_ADD_OTHER	Date of Birth Hint	Date of Birth		—	—
	Required Field Message		Message #: 92601		
	Invalid Birth Date Message		Message #: 92598		

Detail Page

Benefits Selection Page

The Benefits Selection page enables a participant to select one or more plans in which to enroll.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRT_SELECTION_PAGE	Ben Enrollment Selection Page			—	—
BEN_ENRT_SELECTION_CONTENT	Enrollment Selection Content	Instruction	Instruction	BNS.ENRT_SELECTION_CONTENT	Program, Life Event
BEN_ENRT_SELECTION_CR_TOP	Top Flex Credit Region	Instruction	Instruction	BNS.ENRT_SELECTION_CR_TOP	Program, Life Event
BEN_ENRT_SELECTION_CR_BOTTOM	Bottom Flex Credit Region	Instruction	Instruction	BNS.ENRT_SELECTION_CR_BOTTOM	Program, Life Event
BEN_ENRT_SELECTION_SELECT_AREA	Selection Area	Instruction	Instruction	BNS.ENRT_SELECTION_SELECT_AREA	Program, Plan Type, Life Event
BEN_ENRT_SELECTION_AREA	Certification Legend Tip	CtfnLegend	Tip	—	—
ENRT_SELECTION_CR_TABLE	Benefit Selection Table			—	—

Dependents Selection Page

The Dependents Selection page enables a participant to add their dependents to a plan.

Note: For Advanced Benefits customers: if participant dependents are not displaying in this page, verify that you have linked the appropriate life events to the program or plan enrollment requirements in the Dependent Change of Life Event window.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_DEPENDENTS_PAGE	Dependents	Page Region Name		—	—
BEN_ENRL_DEPENDENTS_CONTENT	Dependents Selection	HR Instruction 1	Instruction	DPS.ENRL_DEPENDENTS_CONTENT	Program, Life Event
BEN_ENRL_DEPENDENTS_CONTENT	Plan Level Table Instruction	HR Instruction 3	Instruction	DPS.ENRL_DEPENDENTS_CONTENT_PL	Program, Plan Type, Plan, Life Event
BEN_ENRL_DEPENDENTS_CONTENT	Dependent Table Hint	Help Tip	Hint		Program, Life Event

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_DEPENDENTS_CONTENT	Can't Designate Message	HR Instruction 2	Message #: 92588		—
BEN_ENRL_DEPEN_SELECTION_TABLE	Table			—	

Beneficiary Selection Page

The Beneficiary Selection page enables a participant to add their beneficiaries to a plan.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_BENEFICIARY_PAGE	Beneficiaries			—	—
BEN_BENEFICIARY_CONTENT	Beneficiary Selection	HR Instruction 1	Instruction	BFS.BENEFICIARY_CONTENT	Program, Life Event
BEN_BENEFICIARY_CONTENT	Plan Type Level Table Instruction	HR Instruction 3	Instruction	BFS.BENEFICIARY_CONTENT_PLAN	Program, Plan Type, Plan, Life Event
BEN_BENEFICIARY_CONTENT	Beneficiary Table Hint	Help Tip	Hint	—	
BEN_BENEFICIARY_CONTENT	Can't Designate Message	Can't Designate Message	Message #: 92587		—
BEN_BENEF_SELECTION_TABLE	Beneficiary Selection Table	HR Instruction 3	Beneficiary Selection Table	—	—

Primary Care Provider Page

The Primary Care Provider page enables a participant to select a care provider. If your enterprise partners with a third party supplier of primary care provider information, you can configure this page to allow web–based searches of a database of provider information.

See: Configuring the Primary Care Provider Search Facility: page 13 – 33

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_PCP_SELECT_PAGE	Primary Care Providers			—	—
BEN_PCP_SELECT_CONTENT	Primary Care Provider Selection Content	HR Instruction 1	Instruction	PCP.PcpSelectContentPageLevel	Program, Life Event
BEN_PCP_SELECT_CONTENT	Primary Care Provider Selection Content	HR Instruction 3	Instruction	PCP.PcpSelectContentPlanLevel	Program, Plan Type, Plan, Life Event
BEN_PCP_SELECT_CONTENT	Primary Care Provider Table Hint	Help Tip	Hint	—	
BEN_PCP_SELECT_CONTENT	Can't Designate Message	HR Instruction 2	Message #: 92567		—
BEN_PCP_SELECT_TABLE	Primary Care Provider Table			—	—

Primary Care Provider Summary Page

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_PCP_SEARCH_PAGE	PCP Search Page			—	—
BEN_PCP_SEARCH	Primary Care Provider Search	HR Instruction	Instructions	PCS.PCP_SEARCH	Program, Plan Type, Plan, Life Event
BEN_PCP_SEARCH	Search Region Instruction	HR Instruction 1	Instruction	PCS.PCP_SEARCH_CRITERIA	Program, Plan Type, Plan, Life Event
BEN_PCP_SEARCH	Results Instruction	HR Instruction 2	Instruction	PCS.PCP_SEARCH_RESULT	Program, Plan Type, Plan, Life Event
BEN_PCP_SEARCH_RESULT	Results	Help Tip	Tip	—	—
BEN_PCP_XML_REQUEST_PARAMS	No PCPs found message	Ben PCP Show Label			—
BEN_PCP_XML_REQUEST_PARAMS	The "Map" label column in PCP search results	Ben PCP Direction		—	—
BEN_PCP_XML_REQUEST_PARAMS	PCP Results Table Bar Text	Ben PCP Result Table Bar			

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_PCP_SELECT_SEARCH_TABLE	Search Table			—	—
BEN_PCP_SEARCH_RESULTS_TABLE	Results Table			—	—

Primary Care Provider Search Page

Confirmation Page

The Confirmation page enables a participant to see a summary of their choices and a warning of any oversights or miscalculations they may have made.

Note: You can also use the Confirmation page to display a *signature region* for participants to print from their web browser. Use this region if you require a participant's signature as part of a benefits enrollment. Query the BEN_ENRL_CONF_CONTENT region and click the Node Display check box for the ICX Bucket3 region.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_CONF_PAGE	Ben Enrollment Confirmation Page			—	—
BEN_ENRL_CONF_CONTENT	Ben Enrollment Confirmation Content	HR Instruction	Instruction	BEC.ENRL_CONF_CONTENT	Program, Life Event
BEN_FLEX_CREDITS	Flex Credit Instructions	HR Instruction	Instruction	BEO.FLEX_CREDITS	Program, Life Event
BEN_OVERVIEW_FC_SUMMARY	Flex Credit Summary	HR Instruction	Instruction	BEO.OVERVIEW_FC_SUMMARY	Program, Life Event
BEN_FLEX_CREDIT_ROLLOVERS	Flex Credit Rollovers	HR Instruction	Instruction	BEO.FLEX_CREDIT_ROLLOVERS	Program, Life Event
BEN_OVERVIEW_SELECTIONS	Benefit Selections	HR Instruction	Instruction	BEO.OVERVIEW_SELECTIONS	Program, Life Event
BEN_OVERVIEW_CVRD_DEPS	Covered Dependents	HR Instruction	Instruction	BEO.OVERVIEW_CVRD_DEPS	Program, Life Event

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_CONF_BENEFICIARIES	Beneficiaries Enrollment Confirmation	HR Instruction	Instruction	BEC.ENRL_CONF_BENEFICIARIES	Program, Life Event
BEN_ENRL_CONF_PCP	Primary Care Providers Enrollment Confirmation	HR Instruction	Instruction	BEC.ENRL_CONF_PCP	Program, Life Event
—	Action Item Text			—	—
—	Confirmation Success Message	HR Instruction	Message #: 92605		—
BEN_ENRL_CONF_WARNINGS	Action Item Warning Message	HR Instruction	Message #: 92606		
BEN_OVW_BENEF_TABLE	Benefit Confirmation Area			—	—
BEN_OVW_SELECTIONS_TABLE	Selections Overview Table			—	—
BEN_OVW_CVRD_DEPS_TABLE	Covered Dependents Confirmation Table			—	—
BEN_OVW_BENEF_TABLE	Beneficiary Table				
BEN_OVW_PCP_TABLE	Primary Care Provider Confirmation Table			—	—

Unused Flex Credits Page

The Unused Flex Credits page provides a summary of the flex credits left unspent by a participant.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_UNUSED_FLEX_CREDIT_CONTENT	Unused Flex Credits Content	HR Instruction	Instruction	FLX.UNUSED_FLEX_CREDIT_CONTENT	Program, Life Event
BEN_UNUSED_FLEX_CREDIT_CONTENT	Page Level Instructions — No Unused Credits	HR Instruction	Instruction	FLX.UNUSED_FLEX_CREDIT_NONE	Program, Life Event
—	No Unused Flex Credits message	No Unused Flex	Message #: 92633		

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
	Unused Flex Cred-its will be rolled into participant's paycheck message	Credits Remaining	Message #: 92632		
BEN_UNUSED_ FLEX_CRED-IT_CONTENT	Help Tip	Help Tip	Tip		

Change Session Date Page

The Change Session Date page lets you test future–dated elections. For example, you may want to perform system testing before the start of an open enrollment period. This page should be removed in your production environment so that benefits participants do not alter their enrollment date.

See: Setting the Effective Date of a Scheduled Enrollment in Self–Service Benefits: page 13 – 27

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_EFFEC-TIVE_DATE_CON-TENT	Session Date Con-tent	HR Instruction	Message #: 92604		
BEN_EFFEC-TIVE_DATE_CON-TENT	Session Date Con-tent	HR_EFFEC-TIVE_DATE	Message #: 92637		

Temporary ID Card Page

The Temporary ID Card page lets a participant print an ID card which the participant can use to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider.

Region ID	Region Name	Attribute Name	Tip Type	Required Communication Short Name	Valid Communication Usages
BEN_ENRL_TEMPID_PAGE	Temporary Identification Card	Ben Instruction 1	Instruction	TMP.ENRL_TEMP_ID_PAGE	Program, Life Event
BEN_ENRL_TEMPID_CONTENT	Ben Temporary ID Card Content	Ben Instruction 2	Table Instruction	TMP.ENRL_TEMP_ID_PLAN	Program, Plan Type, Plan, Life Event
BEN_ENRL_TEMPID_CARDS	Ben Temporary ID Card	Ben Instruction 4	Instruction	TMP.ENRL_TEMP_ID_CARD	Program, Plan Type, Plan, Life Event

See: Configuring Web Pages: page 7 – 4

Setting the Effective Date of a Scheduled Enrollment in Self–Service Benefits

Self–Service Benefits provides different ways of controlling the date on which the application records a participant election:

- The Change Session Date web page (for testing environments in both Standard and Advanced Benefits)
- The Change Session Date menu parameter (Standard Benefits)
- Normal date processing based on the session date (Advanced Benefits)

The Change Session Date web page lets you test future–dated elections, such as for an upcoming open enrollment period.

> **Note:** You should remove this web page from your production environment so that benefits participants cannot alter their enrollment date.

Use the Change Session Date menu parameter if you use Oracle Standard Benefits and you want to record the life event occurred date of an enrollment for a date that is not equal to the system date.

For example, if you schedule your open enrollment period for the first two weeks in November, you can set the session date to record all enrollments as of January 1st of the following year.

> **Note:** You can use both features simultaneously, but the date the user enters in the Change Session Date web page overrides the session date parameter for the current session.

▶ **To set the session date in Self–Service Benefits:**

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. Choose from:
   - BEN_SS_BNFT_ENRT (Employee Self–Service Benefits)
   - BEN_SS_MGR_ENRT (Manager Self–Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to display the Change Session Date page or to set the effective date to a date you choose.

   In the following example, setting *displayDate=Y* displays the Change Session Date web page. Setting *&sessionDate=12/31* sets the session date to December 31st for the BEN_SS_MGR_ENRT function.

displayDate=Y&sessionDate=12/31&pFromPersonSearch=Y&pFormFunction=BEN_SS_MGR_SRCH

You enter the session date in *mm/dd* format. Do not include the year.

> **Note:** If you do not set the session date, Self–Service Benefits processes dates based on the date codes you select in your plan design.

Deriving the Year of the Session Date

The application derives the year to use for the session date, so you should not include a year in the session date parameter. If you enter a session day and month that is prior to the *system* day and month, the application uses the current year.

If you enter a session date that is equal to or later than the system day and month, the application sets the session date to the following year.

Removing the Benefits Enrollment Overview Web Page (Standard Benefits)

If you use Standard Benefits, you can remove the Benefits Enrollment Overview web page from your Self–Service Benefits implementation during those periods when you do not want participants to enter or update benefits elections.

When you remove the Benefits Enrollment Overview page, participants can still view their current elections using the Current Benefits Overview web page.

▶ **To remove user access to the Benefits Enrollment Overview page:**

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. For example:
   - BEN_SS_BNFT_ENRT (Employee Self–Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to disallow enrollments by setting allowEnrt=N.
6. Save your work.

Maintaining Primary Care Providers for a Plan

Based on your plan design, benefits participants may have the option, or be required, to select a Primary Care Provider (PCP) when electing a benefit plan.

You use the Maintain Plan Primary Care Providers window to define restrictions for the selection of a primary care provider. You also use this window to set high level configuration options for web–based PCP database searches that are performed through Oracle Self–Service Benefits.

▶ **To maintain primary care providers for a plan**:

1. Select the Name of the plan for which you are maintaining primary care provider data.
2. Check the From Repository field if you are using Oracle Self–Service Benefits and the benefits participant selects a primary care provider through a searchable database of providers.

   Note: As a prerequisite, you must link an organization to this plan (using the Maintain Plan Related Details window) which has an Organization Role Type of Primary Care Provider Locator.

   Note: If you do not check the From Repository field, a participant cannot select a PCP from a list of valid PCPs. The participant must enter the PCP ID number or name in a free form text field.
3. **Note:** The Can Keep Provider field is reserved for future use.
4. Select a Designation Code to indicate if a participant who enrolls in this plan is required to select a PCP, or if PCP selection is optional.
5. Select a Dependent Designation Code to indicate if a participant who enrolls in this plan is required to select a PCP for each dependent covered by the plan, or if PCP selection is optional.
6. Select a Start Date Code that indicates when the selected provider becomes the participant's primary care provider.
7. Enter the number of times a participant is permitted to change primary care providers per month in the Number of Changes Allowed field.
8. For primary care provider searches, select the maximum Radius in miles which the PCP database should consider when returning the results of a search query.
9. Check the Radius warning field to issue a warning message to the participant indicating that the selected PCP is outside the range

allowed by the plan. Checking this field lets a participant override the warning and select a PCP outside the prescribed range.

Note: If you do not check this field, a participant cannot select a PCP outside the radius.

Note: This warning only occurs in the professional forms user interface, not in Self–Service Benefits.

10. Save your work.
11. Choose the Option Restrictions button to open the Plan Primary Care Provider Restrictions window if the requirements for designating a primary care provider differ between the options in the plan.

    Note: For example, if a participant who elects *participant only* coverage is not required to select a PCP, but a participant who elects *employee plus spouse* coverage is required to select a PCP for dependent coverage, you would need to specify designation restrictions at the option level, instead of the plan level.

12. Select the option for which you are specifying PCP designation requirements in the Options field.
13. Select a Designation Code to indicate if a participant who enrolls in this option is required to select a PCP, or if PCP selection is optional.
14. Select a Dependent Designation Code to indicate if a participant who enrolls in this option is required to select a PCP for each dependent covered by the plan, or if PCP selection is optional.
15. Save your work and close the Plan Primary Care Provider Restrictions window.
16. Choose the Plan Restrictions button if the requirements for designating a primary care provider for this plan vary based on the primary care provider type (such as Gynecology or Pediatric Medicine) and the age or gender of the benefits participant.

    Note: The Plan Restrictions button is only activated if you check the From Repository field.

17. Select a primary care provider type for which you are specifying PCP designation requirements based on the age or gender of the benefits participant.

    You maintain primary care provider types using the Lookup Type BEN_PCP_SPCLTY if your primary care providers are stored in an external repository. Use the Lookup Type BEN_PRMRY_CARE_PRVDR_TYP if your PCPs are not stored in a repository.

18. Enter a Minimum Age if the participant must be of a minimum age or older to select this provider type, such as a geriatric care provider.
19. Enter a Maximum Age if the participant must be of a maximum age or younger to select this provider type, such as a pediatric care provider.
20. Select a Gender Allowed Code of Female or Male to restrict the selection of this provider type to one gender, such as female for a gynecology provider.

Configuring the Primary Care Provider Search Facility

As part of a self–service enrollment, a benefits participant can select a primary care provider (PCP) for a benefit plan. As a system administrator, you can configure Self–Service Benefits so that a participant can select a primary care provider through a web–based search of a PCP database.

Self–Service Benefits also supports free form text entry of primary care providers without validation when a repository of PCP data is not used.

Follow the instructions below based on the search type configured by your enterprise.

Setting up an XML–Enabled Primary Care Provider Search

If the search criteria entered by a benefits participant is formatted as an XML search request for use with a database of primary care providers (maintained by your enterprise or a third party), you use the Regions window to configure information such as the URL of the information provider and the Document Type Definition (DTD) used by the search.

> **Note:** Currently, the XML transaction must conform to version 2.0 or 3.0 of the GeoAccess DTD . The DTD version you use should correspond to your Client ID.

▶ **To set up an XML–enabled primary care provider search**:

1. Query the Region ID BEN_PCP_XML_REQUEST_PARAMS.
2. Click the Region Items button.
3. Select the Ben PCP Provider Information attribute and enter the URL of the information provider in the Long Label field.

   > **Note:** Enter the URL as you would in the Address or Location field of your web browser. Do not enclose the URL in quotations.

4. Select the Ben PCP XML DTD attribute and enter the URL of the XML Document Type Definition in the Long Label field.
5. Select the Ben PCP Info Provider Client ID attribute and enter the Client ID given by the information provider in the Long Label field.
6. If you use a proxy server to access an external web site, select the Ben PCP Server Proxy Set attribute and enter **true** in the Long Label field.
   - If you do not use a proxy server, enter **false**.

7. If you use a proxy server, select the Ben PCP Server Proxy Port attribute and enter the port number (typically 80) in the Long Label field.
8. If you use a proxy server, select the Ben PCP Proxy Host attribute and enter the URL of the proxy server in the Long Label field.
9. Select the Ben PCP XML Version attribute and enter the version of XML you are using in the Long Label field, such as 1.0
10. Select the Ben PCP Max Records attribute and enter the maximum number of records to be returned by the query in the Long Label field.

    Note: For best performance, it is recommended that the maximum number of records be set to 100 or less.
11. Select the Ben PCP Request Method attribute and enter the HTTP request method expected by the information provider (such as GET or POST) in the Long Label field.

Setting Up a Primary Care Provider Search without XML Formatting

Customers who create a search page which does not format the PCP query in XML can follow these guidelines for a creating a PCP search that is compatible with Self–Service Benefits.

▶ **To set up a primary care provider search without XML formatting:**

1. Open the Regions window.
2. Query the Region ID BEN_PCP_SELECT_SEARCH_TABLE.
3. Click the Region Items button.
4. Select the ICX_IMAGE_FILE_1 attribute and enter the URL in the URL field that is accessed when a participant clicks the Search button on your custom Search web page.
5. A system administrator or application developer creates a search page that performs the query and accepts the following page–context variables:
   - PcpPersonId = (Person ID of the person for whom you are searching for a primary care provider)
   - PcpPlId = (Plan ID defined for the plan in the database)
   - PcpPlTypId = (Plan Type ID defined in the database)

     Note: You do not need to use these variables if they are not required for your search or validations.

6. If the search is canceled without a selection of a PCP, the following URL must be used to return to the search page:

   - /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE &akRegionApplicationId=805&pcpSearchCancel=1.

     Note: Replace the directory OA_HTML with the base HTML directory of your installation.

7. If the search is successful, the URL accessed by the query must return the following information (properly formatted) with the following parameter names and data types:

Parameter Name	Data	Value	Example
ExtIdent	ID of the primary care provider per the plan.	Number	10154244 (id)
PcpName	Name of the primary care provider	String	Sue Jones, MD (doctorsName)
PcpSpecialty	Specialties of the primary care provider	String	Internal Medicine, Pediatrics (specialty)
PcpPlId	The plan ID that corresponds to the plan name	Number	905 (planId)
PcpPersonId	The person ID passed to the database as part of the query	Number	928374655 (personId)
PcpTypCd	The code of the first primary care provider specialty that is returned by the query	Number	23 (pcpTypCd)

The URL returned by the search should look like this:

- /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE &akRegionApplicationId=805&ExtIdent=id&PcpName=doctors Name&PcpSpecialty=specialty&PcpPlId=planId&PcpPersonId= personId&PcpTypCd=pcpTypCd

  Note: Replace the directory OA_HTML with the base HTML directory of your installation and replace the variables in the URL with the actual values.

Defining Communication Types

You define, update, and delete communication types in the Communication Types window. You complete your communication type definition by defining communication triggers, usages, and delivery information.

▶ **To define a communication type:**

1. Enter a Name for the communication type you are defining.
2. Optionally, enter a Short Name for this communication type.

   Note: Short names are also used to maintain instruction text for regions of self–service enrollment web pages. You must enter the short name in the following format: **BEN.REGIONNAME**. Exclude the **BEN** prefix from the regionname portion of short name.

   See: Benefits Enrollments: page 13 – 15 for a list of the required short names for each web page region.
3. Select a To Be Sent code or rule that defines when the communication should be sent relative to a life event or a given point in the enrollment cycle.
4. Select a kit code in the Part of Kit field to specify whether this communication is a single item (a piece), or one of several communication items in a kit.
   - Select the kit to which this piece belongs in the Kit Name field if this communication is one piece in a kit.
   - View the communication pieces that make up a kit by choosing the View Children button when you have selected a kit.
5. Check the Inspection Required field or select an Inspection Required Rule if this communication must be inspected before it is delivered.
6. Check the Always Send field if this communication should always be sent whenever it is requested or triggered.

   Alternatively, enter the maximum number of times this communication can be sent in the Max Number Available field.
7. Check the Track Mailing field if the system should track the delivery status of this communication.
8. Enter the maximum number of communication that a person can receive of this communication type in the Max Number Available field.

9. Select a Communication Type Rule that further refines the definition of this communication type.
10. Select a Usage type that categorizes this communication.

    Example usage types include Reminder to Act and Confirmation of Action.

    Note: Select a usage type of Self Service Instruction Text if you are configuring a self–service web page.
11. Select a Recipient Code that limits the type of benefits participant to whom this communication is being sent, such as a dependent.
12. Enter a Description of this communication.
13. Save your work.

Defining When to Use a Benefits Communication

You use the Communication Type Usages window to define the conditions that generate an extract of communications data.

You also use this window if you are implementing web–based self–service enrollments and you want to write instruction text that appears in a region of a self–service window.

▶ **To define a communication usage:**

1. Enter or query a communication type in the Communication Types window.
2. Choose the Usages button.
3. Select a value for one or more of the following parameters to limit the conditions under which communications data is generated.
   - Life Event
   - Program
   - Plan
   - Plan Type
   - Enrollment Period
   - Action
4. Select a Usage Rule if your criteria for determining the conditions under which communications data is generated cannot be fully accommodated by the usage criteria on this window.
5. Enter instructional text in the Self Service Description field that corresponds to the region of the self–service web page that you are configuring.
6. Save your work.

Defining Additional Enrollment Action Types (Advanced Benefits)

You use the Enrollment Action Types window to rename an action type delivered with the system. You then link the action type to a program or a plan as part of your enrollment requirements.

You also use this window to edit messages for incomplete action items for Oracle Self–Service Human Resources benefits enrollments.

▶ **To define additional enrollment action types:**

1. Enter a name for the the enrollment action type you are defining in the Name field.
2. Select an enrollment action type in the Type field to specify a generic action a person must resolve in order to enroll in a compensation object.
3. Enter a description of the enrollment action type in the Description field.

   Note: The description text appears as a message when a self–service user is required to complete an action item before an enrollment is valid.
4. Save your work.

Self–Service Individual Compensation Distributions (ICD)

Using Oracle HRMS, you can give managers throughout your enterprise the authority and ability to assign one time or recurring awards, bonuses, and allowances to qualified employees and other individuals using Oracle Self Service Human Resources.

As a compensation manager, you set up individual compensation distribution plans to define the components of an award or allowance. The line manager uses the self service interface to assign the award—setting the start and end date of the distribution—while the back–office maintains control of the plan's administration.

You can also configure *employee self–service* ICD for use by non–manager employees. For example, if your enterprise offers a charitable contribution plan or a savings bond plan to which employees contribute at their own discretion, you can enable the contribution through the self service interface.

Using elements, you can process the distributions through Oracle Payroll. For recurring distributions, you can define the distribution end date, or, using FastFormula, enforce the total maximum distribution you allow in a period.

Security features in Oracle HRMS ensure that managers can assign a distribution only to employees and contractors within their security group. Participant eligibility profiles offer a further way to limit distributions to eligible employees based on a range of criteria, such as assignment data.

Oracle Self Service HR seeds a workflow approval process that automatically sends a notification to the supervisor of the manager who distributes the award. The manager's supervisor can either approve or reject the distribution

Setting Up Individual Compensation Distribution Plans for Self–Service Human Resources

Follow these process steps to set up a variety of individual compensation distribution plans, such as:

- Periodic or spot bonuses
- Sponsored allowances
- Resettlement compensation
- Severance Payments
- Other periodic or recurring awards

As a compensation and benefits administrator, you define an individual compensation distribution plan using the features of Oracle Standard Benefits or Oracle Advanced Benefits.

Once you define the compensation plan, a line manager issues the compensation distribution to the employee through Oracle Self Service Human Resources.

See the following topics for more information on setting up ICD:

- Define the Individual Distribution Compensation Plan: page 13 – 41
- Define Enrollment Requirements for the Plan: page 13 – 43
- Set Up Activity Rates and Coverages for the Plan: page 13 – 44
- Configuring ICD Web pages: page 13 – 47
- Entering People for Test Purposes: page 13 – 47
- Setting Up Employee Self–Service Access to ICD: page 13 – 48

Define the Individual Distribution Compensation Plan

You set up an individual compensation distribution plan by defining the characteristics of the plan and any electable options in the plan. If necessary, you can define participant eligibility profiles to limit the participants who are eligible for the plan or option.

▶ Setting up self–service individual compensation distribution plans

1. Define the Plan Year start and end dates for the compensation plan. Set up several plan years to account for future plan years.

   See: Defining a Program or Plan Year Period, *(Managing Total Compensation Using Oracle HRMS)*

2. Optional: define a participant eligibility profile to control eligibility for the compensation plan.

   If you do not define a participant eligibility profile, the application finds all employees and contractors reporting to the manager eligible for the distribution.

   Note: Set the participant eligibility profile status to active if you define a profile.

   See: Defining an Eligibility Profile, *(Managing Total Compensation Using Oracle HRMS)*

3. Set up one or more Plan Types to group the compensation plans you administer.

   - Required: select an Option Type of Individual Compensation Distribution to enable a manager to distribute the award through the self–service interface.

- Optional: select a Compensation Category of Compensation for reporting purposes or for system extracts.

You can choose to set up a single plan type for all your compensation plans, or you can define multiple plan types for groupings of plans (Bonus, Allowance, Severance, and others).

> **Note:** You should base the number of plan types you define on your reporting requirements.

See: Defining Plan Types, *(Managing Total Compensation Using Oracle HRMS)*

4. Optional: define the options in the compensation plan.
   - Enter a user friendly option name to display in the self service web page.
   - Select the corresponding plan type of each option.

     > **Note:** Use options when there is a logical grouping of choices within a plan, such as a car allowance plan with options of BMW, Honda, and Ford. For bonus plans, severances, and allowances, set up each compensation type as a separate plan.

   See: Defining Options,
5. Define the individual distribution compensation plan.
   - Enter a user friendly plan name to display in the self service web page.
   - Select the plan type of the plan.
   - Set the plan status to active. You can update the status to inactive if you need to temporarily disable the plan.
   - Select a Plan Usage code of May Not Be In a Program.

   In the Not in Program tabbed region:

   - Enter a sequence number that indicates the order in which the plan displays in the self service web page relative to other plans in the plan type.
   - Select the currency of the plan for monetary distributions. You do not enter a currency for non monetary allowances, such as cars.
   - Select the Activity Reference Period of the plan. For recurring awards, the activity reference period is the period the manager sees when distributing the award, for example, $100 per period.

   For non recurring awards, you can select any activity reference period.

See: Defining a Benefits Plan, *(Managing Total Compensation Using Oracle HRMS)*

6. Link the Plan Years to the plan that you defined in Step 1.

   See: Maintaining Plan Related Details, *(Managing Total Compensation Using Oracle HRMS)*

7. If you defined options in Step 4, link the options to the plan.

   - Set the status for each option to active. You can update the status to inactive if you need to temporarily disable an option.

   See: Associating Options with a Plan, *(Managing Total Compensation Using Oracle HRMS)*

8. Link a participant eligibility profile to the plan if you limit eligibility for the plan.

Define Enrollment Requirements for the Plan

You use the Plan Enrollment Requirements window to control the enrollment method for an individual compensation distribution plan. You can also set up required certifications that the individual must provide before Oracle Payroll distributes the award.

▶ **To define plan enrollment requirements:**

1. Define enrollment requirements for the plan.

   - Query the plan you defined in step 5 above.
   - Select an enrollment method of Explicit.
   - Check the Allows Unrestricted Enrollment check box.
   - If you define coverages, select a Coverage Start Date code of Enterable if you want to let the manager enter the coverage start date. The application distributes the award to Payroll following the date. If you do not want the manager to enter the start date, select any other coverage state date code.
   - Select a Coverage Start Date code of Event to set the start date to the system date when the manager enters the self service web page. Use this code for non–recurring awards. The application distributes the award to Payroll in the following payroll period.
   - Required: select a Coverage End Date code that corresponds to your Coverage Start Date code.
   - Activity Rate Start and End Date codes function similarly to coverage codes. Choose Enterable for recurring allowances; for non–recurring allowances, choose Event.

See: Defining Enrollment Requirements for Not in Program Plans, *(Managing Total Compensation Using Oracle HRMS)*

2. Optional: for Advanced Benefits users, link one or more certifications to the plan if you request or require certification from the participant before you make the distribution.

   Oracle HRMS seeds the certification types available with the application.

   > **Note:** If you require a certification, the application suspends the payroll distribution of the award until the participant returns the certification. A message displays to the issuing manager indicating that the distribution is suspended.

   See: Defining Certifications for Enrollment in a Plan, *(Managing Total Compensation Using Oracle HRMS)*

   See: Defining an Action Item Due Date (Advanced Benefits), *(Managing Total Compensation Using Oracle HRMS)*

3. Optional: for Advanced Benefits, you can define communication types that the application generates to inform the participant of a suspended distribution.

   You set up a system extract to write the applicable information from the communication type to a text file. You can then merge the data from the text file into the body of the participant communication.

   See: Defining Communication Types, *(Managing Total Compensation Using Oracle HRMS)*

Set Up Activity Rates and Coverages for the Plan

You set up activity rates to define the amount of a distribution (for fixed rate distributions) or to indicate that the manager enters the distribution amount when the award is assigned in the self–service web page.

> **Note:** You can set up multiple activity rates for an ICD plan; however, you can choose only one rate to display on enrollment to the self–service user.

▶ **To set up activity rates for a plan:**

1. Optional: set up an activity rate for an individual compensation distribution plan or option in the following cases:
   - You do not use coverages.
   - You offer a monetary award and you want to distribute the amount of the award to payroll.

- You create element entries for the award.
- You award a non monetary gift (defined as a coverage) and you need to keep records of the taxable benefit.
- You want to control the maximum amount that can be distributed for a recurring element.

  Note: In order to control the maximum distribution amount, you must configure Oracle Payroll using FastFormula.

Follow these guidelines when setting up the activity rate:

- Set the activity rate status to active.
- Indicate if the activity rate applies to a plan or to an option in a plan.
- Select any Activity Type code.
- Select a Usage code of Standard Contribution / Distribution.
- Select a Unit of Measure if the award is non monetary.

  Note: If the Unit of Measure is monetary, do not select any unit of measure.

Define the calculation method for the activity rate.

- If the award is a flat amount, enter the value of the award.
- If the award is not a flat amount, check the Enter Value at Enrollment check box. For recurring awards, the value the manager enters at enrollment is per the activity reference period defined for the plan.
- Check the Assign on Enrollment and Display on Enrollment check boxes.

See: Defining Activity Rates for a Standard Contribution / Distribution, *(Managing Total Compensation Using Oracle HRMS)*

2. Optional: define a variable rate profile if the activity rate varies according to one or more factors, such as the assignment of the person to whom the manager distributes the award.

   You can also use variable rate profiles to minimum and maximum distributions, increments, and default rates.

   See: Defining General Information for a Variable Rate Profile, *(Managing Total Compensation Using Oracle HRMS)*

3. Optional: create a taxable benefit rate for use with non monetary coverages.

You set up a taxable benefit rate for non monetary coverages like you define a standard activity rate, with the following exceptions:

- Leave the Unit of Measure field blank.
- Select a Calculation Method of Multiple of Coverage.
- Uncheck the Enter Value at Enrollment field.
- Define a multiplier where the number represents the value of one non monetary award.
- Select a Coverage Operator of Multiply by.
- Select a Rounding Code of Round to Nearest Hundredth.
- Uncheck the Display on Enrollment check box.

  Note: You may have to define your coverage first before saving this rate.

4. Optional: create a Maximum Distribution Rate to accompany the standard rate.

   You set up a Maximum Distribution Rate like you define a standard activity rate, with the following exceptions:

   - Select an Activity Type of Total Distribution Limit.
   - Leave the Unit of Measure field blank.
   - Leave the Recurring field blank.

5. Optional: define coverages for the plan if:

   - The award is non monetary and you do not want element entries created for the non monetary award.
   - The award is a non monetary gift (which is defined as a coverage) and you need to keep records of the taxable benefit.
   - You do not define standard activity rates.

   See: Defining a Coverage Calculation, *(Managing Total Compensation Using Oracle HRMS)*

   Follow these guidelines when you set up a coverage definition:

   - Enter a name for the coverage.
   - Select a coverage type.
   - Select a Unit of Measure if the Type is not Coverage.
   - On the Calculation Method Tab, select a Calculation Method of Flat Amount.

     Note: If you want the user to enter the value during the enrollment check the Enter Value at Enrollment check box. Otherwise, enter the amount.

- For recurring distributions, the coverage amount is per the activity reference period defined in the plan.

  Note: You should set up no more than one coverage per compensation plan or option.

Configuring ICD Web pages

You use the Application Dictionary to configure the field labels, hints, tips, and messages that display in an ICD web page.

You can also configure menu names, function names, and certain workflow attributes.

See: Individual Compensation Distributions (ICD): page 13 – 50

Entering People for Test Purposes

You can enter sample people into the Oracle HRMS database to test your Individual Compensation Distribution plan.

Define a Manager:

1. Using the People window, define a manager with a date of birth, social security number, and address.
2. Enter an Assignment for the manager.
3. Check the Manager check box located in the Miscellaneous tabbed region.
4. Select the manager's GRE in the GRE tabbed region.

Define an Employee:

1. Using the People window, define an employee with a date of birth, social security number, and address.

   Note: If you use eligibility profiles, make sure the test employee meets your eligibility requirements.
2. Enter an Assignment for the employee.
3. Select the test manager you created as the employee's supervisor on the Supervisor tabbed region.
4. Select the employee's GRE in the GRE tabbed region.

Create a User Name and Password for the Test Manager:

1. As a system administrator, open the User Types window to define a user name and password for the manager you created.
2. Link the Manager Self Service responsibility to the user name.
3. Save your work and close the window.

Assign an Individual Compensation Distribution to the Employee:

1. Using the manager's user name and password, log on to Oracle Self Service HR.
2. Choose the Individual Compensation menu item.
3. Find the Employee you created.
4. Assign the individual an award.

Setting Up Employee Self–Service Access to ICD

You can configure ICD for employee self–service access. Use this feature if your enterprise administers charitable contribution plans, savings bond plans, or service recognition plans where you allow the employee to select from one or more awards.

> **Note:** You set up employee self–service plans as you would other plans, using the professional user interface. However, you should include employee self–service plans in their own plan type, so that participants cannot view plans only available to managers.

▶ **To set up employee self–service access to ICD:**

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Enter a new function name—without spaces—in the Function field.
4. Enter a User Function Name for this function.
5. Select SSWA JSP Function as the function Type.
6. Optional: enter a Description of the function.
7. Choose the Form tab.
8. Enter the following paramter, substituting the function name you entered in Step 3 and your plan type IDs where indicated:
   - pProcessName=HR_INDIVIDUAL_COMP_PRC&pItemType=HRSSA&pCalledFrom=<your new function code>&PLANTYPE=<your plan type IDs separated by commas>
9. Choose the Web HTML tab.
10. Enter the following string in the HTML Call field:
    - OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800

11. Save your work.
12. Close the Form Functions window and open the Menus window.
13. Add the function you just created to the Employee Self–Service Menu.
14. Save your work.

Individual Compensation Distributions (ICD)

The Individual Compensation Distributions (ICD) module enables supervisors to manager compensation distributions throughout the enterprise. They can also assign one–time and recurring awards, bonuses, and allowances to employees. The Benefits or Compensation administrator needs to define the individual compensation distribution plans using Oracle Advanced Benefits or Oracle Standard Benefits.

See: Self–Service Individual Compensation Distributions: page 13 – 40

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Individual Compensation Distributions

See: Defining User Access and Menus: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Compensation Distribution

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

ICD Plan Selection Page

Region Code	Region Name
BEN_PLAN_SELECTION_PAGE	Plan Selection
BEN_PLAN_SELECTION_CONTENT	Comp Plan Selection
BEN_COMP_PLAN_TABLE	Comp Plan Selection Table

ICD Update Mode Selection Page

Region Code	Region Name
BEN_COMP_UPD_MODE_PAGE	Compensation Update Mode Selection Page
BEN_COMP_UPD_MODE_CONTENT	Compensation Update Mode Selection Content

ICD Update Page

Region Code	Region Name
BEN_COMP_DETAILS_PAGE	Compensation Details
BEN_COMP_DETAILS_CONTENT	Compensation Details Content

ICD Review Page

Region Code	Region Name
BEN_COMP_REVIEW_CONTENT_SS	Compensation Review Content

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
BEN_PLAN_SELECTION_CONTENT	Comp Plan Selection	HR Instruction	Benefits Communication Type	CPS.PLAN_SELECTION_CONTENT
BEN_COMP_UPD_MODE_CONTENT	Compensation Update Mode Selection Content	HR Instruction	Long Message	BEN_92737_COMP_UPD_MD_INSTR

Region ID	Region Name	Attribute Name	Tip Type	Message Name
BEN_COMP_DETAILS_CONTENT	Compensation Details Content	HR Instruction	Benefits Communication Type	CPD. COMP_DETAILS_CONTENT
BEN_COMP_REVIEW_CONTENT_SS	Compensation Review Content	HR Instruction	Benefits Communication Type	(Review Page): CPC.COMP_CONFIRM_CONTENT (Confirmation Page): CPR.COMP_REVIEW_CONTENT

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Not applicable

CHAPTER

14 Self–Service Payroll

Overview of Payroll Functions

SSHR currently includes the following payroll functions:

- Online Payslip
- Personal Payment Methods
- Online Tax Form

The following section gives technical information on configuring the generic versions of these functions. You should note, however, that these functions are generally localized and you should see the relevant documentation for your localization for additional implementation and configuration information.

Payment Methods

The Payroll Payments module enables employees to specify how they wish their salary to be paid by dividing an employee's net pay into one or more payments. Each payment is of a particular type (cash, check, deposit) and has an associated amount and a priority. The payments are made in order of priority. SSHR always uses the lowest priority payment to pay any net pay remaining after all the other payments have been made. It is also possible that low priority payments may not receive all (or any) or their allotted funds because of the amounts used to process higher priority payments.

A typical use of this function occurs if an employee wants to split the net pay so that $100 is paid into a savings account and the rest is paid into a current account. The employee can subsequently change the amount paid into the savings account if required.

You can apply configuration options to determine:

- whether employees can use the module for multiple payments
- whether payment information is for viewing only
- which types of payments the employee can select (cash, check, deposit, or a combination)
- how the payment amounts are defined (percentage of net pay or a monetary amount)
- the maximum number of payments an employee can set up
- which organization payment methods are used

If you configure Payment Methods so that employees can edit their payments, they can carry out the following steps:

- create new payments
- update existing payments
- delete payments
- change the priorities for payments

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service V4.0	Manage Payroll Payments V4.0

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Payroll Payments V4.0

> **Note:** The Process Payroll Payments module does not support approvals.

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	View Only
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Permitted Payment Types
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Maximum Payment Methods
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Permitted Amount Types
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Deposit Payments List
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Cash Payments List
Process Payroll Payments V4.0	Manage Payroll Payments V4.0	Cash Payments List

View Only

Specifies whether the employee can edit the payments information. The default value enables editing.

Permitted Payment Types

Specifies which types of payment methods an employee can create. The available payment types are cash, check, and deposit. The default value allows the employee to create any of the three payment types.

Maximum Payment Methods

Specifies the maximum number of payments that an employee can create (up to 10). The default value is 5.

Permitted Amount Types

Specifies the amount types for payments. The payment amount can be a monetary amount or a percentage of net pay. The default value enables both amount types.

Deposit Payments List

This attribute is only used if you have enabled deposit payments. This attribute stores a list of Organizational Payment Method (OPM) names that can be used to create a deposit payment. The OPM names are separated by a vertical bar (|). The module uses the first match to a deposit OPM name (for the employee's payroll) when new deposit payments are created. For example, East_Coast_NACHA | West_Coast_NACHA.

Cash Payments List

This is used in the same way as the Deposit Payments Checklist but for cash payments.

Check Payments List

This is used in the same way as the Deposit Payments Checklist but for check payments.

> **Note:** The administrator must set at least one of Deposit Payments List, Cash Payments List, or Check Payments List.

See: Configuring Workflow Attribute Values: page 6 – 7

Configurable Definitions for Web Applications Dictionary:

The following definitions can be configured in the Web Applications Dictionary:

Regions

Summary and Edit Pages

Region Code	Region Name
PAY_PAYMENTS_TOP_SS	Payroll Payments Top
PAY_PAYMENTS_EDIT_SS	Payroll Payments Edit
PAY_PAYMENTS_SUMMARY_SS	Payroll Payments Summary
PAY_PAYMENTS_LABELS_SS	Payroll Payments Labels

Review Page

Region Code	Region Name
PAY_PAYMENTS_REVIEW_SS	Payroll Payments Review

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 1		PAY_PSSV4_ADD_CASH_OVER-VIEW
PAY_PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 2		PAY_PSSV4_ADD_CHECK_OVER-VIEW
PAY_PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 3		PAY_PSSV4_ADD_CHEQUE_OVER-VIEW
PAY_PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 4		PAY_PSSV4_ADD_DE-POSIT_OVER-VIEW
PAY_PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 5		PAY_PSSV4_ADD_REMAIN-ING_PAY
PAY_PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 1		PAY_PSSV4_UP-DATE_CASH_OVERVIEW
PAY_PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 2		PAY_PSSV4_UP-DATE_CHECK_OVERVIEW
PAY_PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 3		PAY_PSSV4_UP-DATE_CHEQUE_OVERVIEW
PAY_PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 4		PAY_PSSV4_UP-DATE_DE-POSIT_OVER-VIEW
PAY_PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 5		PAY_PSS_RE-MAINING_PAY

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View–only Mode Instructions	Pay Instruction 1		PAY_PSSV4_DETAILS_OVERVIEW
PAY_PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View–only Mode Instructions	Pay Instruction 2		PAY_PSSV4_DETAILS_OVERVIEW
PAY_PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View–only Mode Instructions	Pay Instruction 3		PAY_PSSV4_DETAILS_OVERVIEW
PAY_PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View–only Mode Instructions	Pay Instruction 4		PAY_PSSV4_DETAILS_OVERVIEW
PAY_PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View–only Mode Instructions	Pay Instruction 5		PAY_PSS_REMAINING_PAY
PAY_PAYMENTS_SUMMARY_INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 1		PAY_PSSV4_SUMMARY_EDIT_OVERVIEW
PAY_PAYMENTS_SUMMARY_INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 2		PAY_PSS_EDIT_DFLT_MANDATORY_ PAY
PAY_PAYMENTS_SUMMARY_INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 3		PAY_PSS_EDIT_DFLT_CASH
PAY_PAYMENTS_SUMMARY_INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 4		PAY_PSS_EDIT_DFLT_CHECK
PAY_PAYMENTS_SUMMARY_INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 5		PAY_PSS_EDIT_DFLT_CHEQUE
PAY_PAYMENTS_SUMMARY_INS2_SS	Payroll Payments Summary View–only Mode Instructions	Pay Instruction 1		PAY_PSSV4_SUMMARY_VIEW_OVERVIEW
PAY_PAYMENTS_SUMMARY_INS2_SS	Payroll Payments Summary View–only Mode Instructions	Pay Instruction 2		PAY_PSS_MANDATORY_PAY

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_PAYMENTS_SUMMARY_INS2_SS	Payroll Payments Summary View–only Mode Instructions	Pay Instruction 3		PAY_PSS_CASH_SALARY
PAY_PAYMENTS_SUMMARY_INS2_SS	Payroll Payments Summary View–only Mode Instructions	Pay Instruction 4		PAY_PSS_CHECK_SALARY
PAY_PAYMENTS_SUMMARY_INS2_SS	Payroll Payments Summary View–only Mode Instructions	Pay Instruction 5		PAY_PSS_CHEQUE_SALARY

See: Adding Instructions to Web Pages: page 7 – 9

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
PAY_PAYMENTS_EMPLOYEE_TABLE_SS	Payroll Payments Employee Table	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_EDIT_DETAILS_SS	Payroll Payments Edit Details	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_REVIEW_SS	Payroll Payments Review	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield

See: Configuring Flexfields: page 7 – 5

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Payroll Payments Self–Service Enable Multiple Assignments	Site	Yes / No	No

HR:Payroll Payments Self–Service Enable Multiple Assignments

Specifies whether the employee can use the function to define payments for multiple assignments. The default value only permits payments for the primary assignment.

See: User Profiles (*Oracle HRMS Applications User Guide*)

Online Payslip

The Payslip module enables employees to view an electronic payslip for a pay period. Employees can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the the employee's primary assignment. Once the employee has logged into the application and clicks on the View Payslip option, the employee will see an electronic version of their payslip based on their primary assignment and the last pay period that has been processed.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service V4.0	Payslip V4.0

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Atributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Region Code	Region Name
PAY_AC_PAYSLIP_CUR_YTD_SS	Pay AC Payslip Current and YTD
PAY_AC_PAYSLIP_HOUR_EARN_SS	Pay AC Payslip Earning and Hours

Region Code	Region Name
PAY_AC_PAYSLIP_SUMMARY_SS	Pay AC Payslip Summary
PAY_PAYSLIP1_SS	Pay Payslip Region 1
PAY_PAYSLIP2_SS	Pay Payslip Region 2
PAY_PAYSLIP3_SS	Pay Payslip Region 3
PAY_PAYSLIP4_SS	Pay Payslip Region 4
PAY_PAYSLIP_EE_ADDR_CELL1_SS	Pay Payslip Ee Addr Cell1
PAY_PAYSLIP_EE_ADDR_CELL3_SS	Pay Payslip Ee Addr Cell3
PAY_PAYSLIP_ER_ADDR_CELL1_SS	Pay Payslip Er Addr Cell1
PAY_PAYSLIP_ER_ADDR_CELL3_SS	Pay Payslip Er Addr Cell3
PAY_PAYSLIP_NET_PAY_SS	Pay Payslip Net Pay Distribution
PAY_PAYSLIP_OTHER_INFO_SS	Pay Payslip Other Info
PAY_PAYSLIP_OTHER_INFO_TABLE_SS	Pay Payslip Other Info Table
PAY_PAYSLIP_PAYPRD_SALARY_SS	Pay Payslip Pay Period Salary
PAY_PAYSLIP_PRSN_INFO_TBL1_SS	Pay Payslip Person Info Tbl1
PAY_PAYSLIP_PRSN_INFO_TBL2_SS	Pay Payslip Person Info Tbl2
PAY_PAYSLIP_RATE_DETAILS_SS	Pay Payslip Rate Details
PAY_US_PAYSLIP_TAX_WHOLD_SS	Pay US Payslip Tax Wholding Info

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Not applicable

FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods an employee can view in the online payslip. If the profile option is not set, an error message is displayed when the employee attempts to view the online payslip.

See: User Profiles (*Oracle HRMS Applications User Guide*)

Online Tax Form

The Online Tax Form module enables employees to make changes to their W4 tax information. When an employee makes changes to the Federal information, all the states that follow the Federal information are also updated, unless the filing status, number of allowances, or exempt status are different.

If an employee claims tax exemption or has allowances that exceed the state limit, the HR / Payroll representative receives a notification and can review the data. If the HR / Payroll representative makes any changes to the data, the employee receives a notification.

Menu and Function Names

This module can be accessed from the following menus and functions:

User Menu Name	Function Name
Employee Self Service	Online Tax Forms V4.0

See: Defining Menus for SSHR: page 5 – 12

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change W4 Information JSP PRC

Configurable Workflow Attributes:

Not applicable

Configurable Web Applications Dictionary Regions:

The following definitions can be configured in the Configuration Framework:

Regions

Tax Form Overview Page

Region Code	Region Name
PAY_W4_OVERVIEW_SS	W4 Overview Header
PAY_W4_OVERVIEW_SS_FED_CELL1	W4 Overview Fed Detail Cell1

Region Code	Region Name
PAY_W4_OVERVIEW_SS_FED_CELL2	W4 Overview Fed Detail Cell2
PAY_W4_OVERVIEW_SS_FED_INFO	W4 Overview Fed Info
PAY_W4_OVERVIEW_SS_FED_ROW	W4 Overview Fed Detail Row
PAY_W4_OVERVIEW_SS_FED_W4	W4 Overview Fed W4 Detail
PAY_W4_OVERVIEW_SS_TOP	Overview

Tax Form Update Page

Region Code	Region Name
PAY_W4_REVIEW_SS_HEADER	W4 Review Region

Tax Form Update Page

Region Code	Region Name
PAY_W4_UPDATE_FOOTER	Pay W4 Update Footer
PAY_W4_UPDATE_SS_AGREEMENT	W4 Update Agreement
PAY_W4_UPDATE_SS_AGREE_ROW	W4 Update Agree Row
PAY_W4_UPDATE_SS_AGREE_TABLE	W4 Update Agree Table
PAY_W4_UPDATE_SS_EXEMPT	W4 Update Exempt
PAY_W4_UPDATE_SS_EXEMPT_ROW	W4 Update Exempt Row
PAY_W4_UPDATE_SS_EXEMPT_TABLE	W4 Update Exempt Table
PAY_W4_UPDATE_SS_FILING_DETAIL	W4 Update Filing Detail
PAY_W4_UPDATE_SS_TOP	Update

See: Configuring Web Pages: page 7 – 4

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_W4_OVERVIEW_SS	W4 Overview Header	Information Text		PAY_W4_OVERVIEW_MSG
PAY_W4_UPDATE_SS_FILING_DETAIL	W4 Update Filing Detail	Information Line5		PAYSSW4_UPDATE_HEADER_INFO
PAY_W4_UPDATE_SS_EXEMPT	W4 Update Exempt	Information Line9		PAY_US_OTF_W4_EXEMPTSTAT_TXT
PAY_W4_UPDATE_SS_AGREEMENT	W4 Update Agreement	Information Line10		PAYSSW4_UPDATE_AGREEMENT_INFO
PAY_W4_UPDATE_SS_FILING_DETAIL	W4 Update Filing Detail	Allowances	Long Message	PAY_US_OTF_W4_ALLOWANCES_TXT
PAY_W4_UPDATE_SS_FILING_DETAIL	W4 Update Filing Detail	Additional Amount	Long Message	PAY_US_OTF_W4_ADDLAMOUNT_TXT

See: Adding Instructions to a Web Page: page 7 – 9

FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR: Online Tax Forms Update Method	Site	All, None, Primary	Primary
HR: HR/Payroll Representative Source	Site	Custom PL/SQL, GRE Contact Information, Further Payroll Information	Further Payroll Information

See: User Profiles (*Oracle HRMS Applications User Guide*)

APPENDIX

A Implementation Steps

Implementation Steps for Self–Service HR (SSHR)

SSHR is supplied with predefined data and functionality, although you must configure this data and functionality for your own implementation of SSHR.

Functions in the areas of Appraisals, Candidate Offers, Suitability Matching, and Oracle Training Administration (OTA) have not yet been migrated to the new technology framework for SSHR version 4.0. For information on these functions, please see Implementing Self–Service Human Resources (SSHR) 3.4 (11*i*.2) which is available on Metalink.

> **Note:** If you try to configure functionality before you are familiar with Oracle HRMS and Oracle Workflow, you may make mistakes. Before you complete any step, read the referenced topic information.
>
> **Note:** It is your responsibility to populate data fields.

To Prepare the Environment for SSHR:

1. Ensure that Oracle Human Resources 11*i* is installed with the most up–to–date patch according to the readme file for SSHR at the time of installation.
2. Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self–Service Web Applications Implementation Manual* (available on Metalink).
3. Apply the patch for SSHR 4.x and make sure that all prerequisites are met, including those for the OSSWA Framework.
4. Complete the install and set–up of the OSSWA Framework.

   See: *Configuring and Troubleshooting Oracle HTTP Server with Oracle Applications* (available on Metalink – technical note number: 139863.1)
5. If you have licensed SSHR, set the following profile option to ”Yes” at the site level.

   - HR: Self Service HR Licensed

   If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.
6. Check that you have the correct Internet browser. You can use Netscape Navigator 4.08 or Microsoft Internet Explorer version 4 or 5.

Note: Advise your users that they should not use the Forward and Back options in their Internet browser. They should use the SSHR application to navigate between pages.

7. Ensure that your browsers do not cache Web pages and that they keep the cache size as small as possible. Your browser must reload Web pages on each access. To do this in Netscape Navigator, set the cache to clear, "Every Time" and the cache size to zero. In the Internet Explorer, set the cache to clear "Every visit to the page" and the Amount of disk space to the minimum possible which is usually 1MB.

8. Create an SSHR Background Workflow Cleanup Process

   You should remove transaction information from the temporary tables for processes that support Web transactions. To do this, include the Remove Transaction activity in the workflow process.

   See: Creating a Workflow Cleanup Process:

9. Make sure that the OSSWA Framework is installed.

10. Install the Workflow Builder on Selected Workstations

    Members of your Implementation team who will be making changes to workflow process definitions beed to have the Workflow Builder installed on their workstations or available from a file server.

11. Set the Access Levels for the Predefined Workflow Item Type

    The predefined workflow item type is used as the basis for all future upgrades. Provided the access and protection levels are set correctly, you can work with the delivered item type and your configurations will not be overwritten.

    See: Updating Workflow Objects: page 6 – 3

    See: Overview of Oracle Workflow Access Protection (*Oracle Workflow Guide* – available on Metalink)

12. Configure the HRMS applications

    Define work structures, key flexfield, descriptive flexfields, lists of values.

    See: Oracle HRMS Applications User Guide

13. Check that you now have the required tools for implementing SSHR. You should have now installed the following tools:

    - Oracle Workflow
    - Web Applications Dictionary

- Oracle Applications
- HTML Editor or Text Editor
- SSHR
- OSSWA Framework

See: Getting Started with SSHR: page 2 – 2

User Access and Workflow Set Up (SSHR)

14. Identify the Target User Groups

    Before starting your implementation, it is important to identify any groups of users in your enterprise who may have different requirements. Most enterprises will differentiate between managers and other employees. In your enterprise, you may identify further distinct groups such as HR professionals, managers in a particular department, or senior managers.

15. Create the User Menus

    User menus group together a number of functions. SSHR includes predefined menus for employees, managers, and system administrators, but we recommend that you create your own user menus using the seeded menus as a basis. To create user menus, use the Menu window.

    See: Menus Window, *(Oracle Applications System Administrators Guide)*

    See: Defining User Access and Menus: page 5 – 12

16. Create Self–Service Responsibilities

    SSHR is supplied with predefined responsibilities, however, we recommend that you create your own responsibilities based on the seeded responsibilities. Assign a menu to them in the Responsibilities window.

    See: Responsibilities Window *(Oracle Applications System Administrator's Guide)*

    See: Self–Service Responsibilities and User Access: page 1 – 19

17. Configure the Person Search Screens

    Three tabs are displayed on the Person Search page. You can choose whether to display all these tabs or whether to hide one or more tabs from the user. You remove a tab from display in the Menu Exclusions Region of the Responsibilities window.

See: Person Tree: page 9 – 3

18. Set Up the System Profiles

    You set up the security profiles to control access to information.

    See: User Access and Security: page 5 – 2

19. Link the Responsibilities to Your Security Profiles

    Use the System Profile Values window to link the responsibilities you have created to your security profile.

20. Set the HR: Cross Business Group Profile

    If you want your managers to be able to access data for employees in other business groups, also set the HR: Cross Business Group responsibility.

    See: User Profiles (*Oracle Applications User's Guide*) and (*Oracle Applications System Administrator's Guide*).

21. Set the Allow Granted Access Profile

    If you want managers to be able to access data for employees outside their security profile whose information has been released to them using the Release Employee Information function, also set the Allow Granted Access profile option to Yes for the responsibility.

    See: User Profiles (*Oracle Applications User's Guide*) and (*Oracle Applications System Administrator's Guide*).

    See: Release Employee Information: page 9 – 11

22. Manually Create User Accounts

    Create at least one user account manually to test the responsibilities and menus. For a small enterprise, you may choose to create all your user accounts manually and skip the next step.

    See: Defining User Access and Menus: page 5 – 12

23. Configure Batch Creation of User Accounts

    To create and manage the batch creation of user accounts, you must first write API user hooks. User hooks enable you to extend the predefined business rules to reflect your enterprise's business rules. You use the user account hooks for example, to set up your customary user name and password format, responsibilities, and profile options you want to associate with a user.

    See: Writing User Hooks to Create Batch User Accounts: page 5 – 20

See: Setting Up Batch Creation of User Accounts: page 5 – 25

Configuring Workflow Processes and Page Layouts (SSHR)

24. Display Your Enterprise Logo

    SSHR is delivered with a default Oracle logo in the upper left hand corner of the application. You can replace this logo with your own.

    Place the logo in the $OA_MEDIA / <Language> directory.

    The logos are named FNDLWAPP.gif for SSHR version 3.2 and later, and FNDLOGHR for SSHR 2.0 functions.

    See: Displaying a New Logo: page 7 – 12

25. Define your Email Address

    Set up the email addresses for your enterprise. Set up the following addresses using the Attributes Value tab in the Workflow Builder:

    - HR email address
    - Training administrator email address
    - Recruitment supervisor email address

    See: Defining Your Enterprise's Email Addresses: page 6 – 9

26. Configure Your National Address Style

    To ensure that the correct address style for your country is used in the application, select one of the predefined address styles. The default address style is determined by the legislation of the business group. To select an address style, use the Descriptive Flexfield Segments window.

    See Descriptive Flexfields and Address Styles (*Oracle Applications User Guide*)

27. Identify and Prioritize Required Business Flows

    SSHR is delivered with a number of business flows incorporating workflow–enabled functions. First identify which business flows you need to implement for your enterprise. Consider the information flows and approval processes within your enterprise.

    For each business flow, repeat steps 15 thru 26. Detailed information is available in the relevant chapters as indicated. Details of the configuration options are available for each SSHR module.

28. Configure the Workflow Process

Review the underlying workflow process in the Workflow Builder. If you wish to make changes, first copy the process so that you can make changes to the copy.

See: Self–Service Workflows: page 6 – 2

29. Configure the Approvals Process

    Review the seeded approvals processes and, if necessary, configure changes in the Workflow Builder.

    See: Approvals Processes: page 8 – 2

30. Configure the Workflow Error Processes

    Each workflow–enabled function has an error process that runs when a system error occurs. The error process sends a notification and a description of the error to the sysadmin ID. You configure the error processes in the Workflow Builder.

    See: Configuring Workflow Error Processes: page 6 – 8

31. Link the Workflow Item Type to the Function

    Use the Form Functions Window and the Parameters field to link the workflow item type to functions. The Parameters field is displayed when you select the Form tab.

    See: Form Functions Window, *(Oracle Applications System Administrators Guide)*

32. Add the Functions to the User Menu

    Make sure that your configured functions are available in your user menus.

    See: Defining User Access and Menus: page 5 – 12

33. Set Up User Profile Options

    User profiles control how users access information and how the information is displayed. You define the profiles at either the user or responsibility level in the System Profile Values window.

    See: User Profiles (*Oracle HRMS Applications User Guide*)

34. Test the Basic Flow

    Test the workflow process to make sure that it is correct.

    See: Testing a Workflow Definition (*Oracle Workflow Guide*)

35. Configure the Regions and Region Items for Your Functions

    In the Configuration Framework and, if necessary, in the Web Applications Dictionary, configure the regions and region items.

See: Configuring Page Layouts

36. Configure Flexfields for the Regions

    You can configure the flexfield structures in the Application Developer responsibility, then enable selected segments in the current region using the Configuration Framework.

    See: Configuring Flexfields: page 7 – 5

37. Create Messages for the Regions

    You can add predefined messages to your regions or you can create your own messages if required.

    See: Adding Instructions to Web Pages: page 7 – 9

User Hooks To Generate User Names For New User Registration

As supplied, the New User Registration processes (Create New User, New Employee Registration, and Non–employee Registration) include a User ID page where users can enter a user name and password for logging on to self service. Alternatively, you can implement some additional code so that the user name and password are generated by the application when the user clicks a button on this page. You can implement this using user hooks.

There are two user hooks:

- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_B (which we will call the “Before user hook” because it runs before the user name is created)
- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_A (which we will call the “After user hook” because it runs after the user name is created)

They are called in the user api BEN_PROCESS_USER_SS_API. The user hooks communicate with this caller api through a set of globals. These globals are defined in the package BEN_PROCESS_USER_UTILITY. The usage notes within this package explain how to use the globals.

Using the Before User Hook

Use the Before user hook to set globals with user and responsibility information. To set the globals with user information, use G_FND_USER_RECORD. To associate responsibility and security group / security profile information with the user, use G_FND_RESP_RECORD. If you do not set the responsibility and security information using globals, the application uses the responsibility from the *OAB:Self Registered Employee Responsibility* profile option.

Minimum Setup

The minimum you need to do to create a user with today’s date as the start date is to put the following two lines in the Before user hook.

```
ben_process_user_utility.g_fnd_user_record.user_name := 'testuser';
ben_process_user_utility.g_fnd_user_record.password :=
'testpassword';
```

You can also set up globals for start_date, end_date, last_logon_date, password_date, password_accesses_left, password_lifespan_accesses,

password_lifespan_days, email_address, fax, description, customer_id, and supplier_id.

Attention: Never set the employee_id global within the New User Registration processes. If you do so, the global overwrites the employee id created during the process and so the user will not be associated with the correct employee id. If you want to use the user wrapper api outside of the page for creating user name and password, you can then pass in the global for employee id.

Using the After User Hook

Use the After user hook to accomplish something that needs to be done after a user is created. For example, the Before user hook enables you to pass in information about a responsibility, but it does not handle multiple responsibilities. You could pass no information about responsibility in the Before user hook and instead call the appropriate ”fnd” api(s) in the After hook to take care of the responsibility, menu, or any profile value that you want to associate with the user.

Another use for the After hook might be to write code to populate some tables—such as communication or extract tables—from where you can extract the information later.

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 The recognized amount of leave credited to an employee which is accumulated for a particular period.

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*

Beneficiary A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

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.

Collective Agreement Grade Combination of information that allows you to determine how an employee is ranked or graded in a collective agreement.

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*

Compensation Object For Standard and Advanced Benefits, compensation objects define, categorize, and help to manage the benefit plans that are offered to eligible participants. Compensation objects include programs, plan types, plans, options, and combinations of these entities.

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.

Configurable 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 configuration.

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*

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*

Dependent In a benefit plan, a person with a proven relationship to the primary participant whom the participant designates to receive coverage based on the terms of the plan.

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 configure 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*

Electability The process which determines whether a potential benefits participant, who has satisfied the eligibility rules governing a program, plan, or option in a plan, is able to elect benefits. Participants who are *eligible* for benefits do not always have *electable* benefit choices based on the rules established in a benefit plan design.

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 configured form, or for distributing costs.

Eligibility The process by which a potential benefits participant satisfies the rules governing whether a person can ever enroll in a program, plan, or option in a plan. A participant who is *eligible* for benefits must also satisfy *electability* requirements.

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.

Entitlement In Australia, this is all unused leave from the previous year that remains to the credit of the employee.

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.

Group Certificate In Australia, this is a statement from a legal employer showing employment income of an employee for the financial year..

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

Leave Loading In Australia, an additional percentage amount of the annual leave paid that is paid to the employee.

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.

Legal Employer A business in Australia that employs people and has registered with the Australian Tax Office as a Group Employer.

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.

Long Service Leave Leave with pay granted to employees of a particular employer after a prescribed period of service or employment with that employer.

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.

Medicare Levy An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

N

NACHA National Automated Clearing House Association. This is the US system for making direct deposit payments to employees.

National Identifier This is the alphanumeric code that is used to uniquely identify a person within their country. It is often used for taxation purposes. For example, in the US it is the Social Security Number, in Italy it is the Fiscal Code, and in New Zealand it is the IRD Number.

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.

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.

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 Public Service Number (PPS) The Irish equivalent to National Insurance number in the UK, or the Social Security number in the US.

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 Security Groups Enabled security. See also: *Responsibility, Security Profile, User Profile Options*

Security Groups Enabled Formerly known as Cross Business Group Responsibility security. This security model uses security groups and enables you to link one responsibility to many Business Groups.

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.

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.

Superannuation Guarantee An Australian system whereby employers are required to contribute a percentage of an eligible employee's earnings to a superannuation fund to provide for their retirement.

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.

Index

A

Academic Rank, 10 – 38
Access levels, 6 – 3
Action items
  and self–service messages, 13 – 39
  defining, 13 – 39
Actions, Save for Later, 3 – 10
Actions page, 3 – 10, 5 – 5, 9 – 8
Adding instructions, 7 – 9
Approvals, 6 – 2, 8 – 2
  Approvals with Correction, 8 – 3
  configuring in Workflow Builder, 8 – 7
  customizing using PL/SQL, 8 – 8
  Review and Confirm, 9 – 14
  workflow, 8 – 4
Approvals with Correction, 8 – 3
Assignment, 11 – 4
Assignment Details view, 12 – 5

B

Basic Details, 10 – 6
Batch user accounts, 5 – 18
  and concurrent programs, 5 – 20
  and user hooks, 5 – 25
Benefit Enrollment, 13 – 15
Benefits Enrollment
  configuring, 13 – 8
  removing Benefits Enrollment page, 13 – 29
Benefits enrollments, 13 – 2

C

Chaining MEE functions, 11 – 2
Change Location, 11 – 13
Change Manager, 11 – 23
Communications
  defining, 13 – 36
  self service forms, 13 – 38
  usages, 13 – 38
Compensation Activity view, 12 – 8
Competence Profile, 10 – 28
Concurrent programs for batch user creation, 5 – 20
Configuration
  guidelines, 4 – 2
  overview, 4 – 2
Configuration Framework, 7 – 2
  hierarchy, 7 – 2
Configuring
  flexfields, 7 – 5
  global button bar, 7 – 11
  tabbed regions, 7 – 6
  web pages, 7 – 4
  workflow attribute values, 6 – 7

workflow error processes, 6 – 8
Create User Name, 9 – 32, 9 – 41

D

Dates
effective, 3 – 8
future–dated changes, 3 – 8
schedule enrollments in Benefits, 13 – 27
Defining your email address, 6 – 9
Definitions, 1 – 5
Dependents and Beneficiaries, 10 – 16

E

Education and Qualifications, 10 – 22
Effective dates, 3 – 8
Email address, 6 – 9
defining, 6 – 9
Emergency Contacts, 10 – 18
Error processes, configuring, 6 – 8

F

Flexfields, configuring, 7 – 5
Functions
and user access, 5 – 5
defining, 5 – 15
legislation–specific, 5 – 6
Functions (SSHR), 1 – 7
Future–dated changes, 3 – 8

G

Generic user ID, for New User Registration, 9 – 21
Global button bar, configuring, 7 – 11

H

HR views, 12 – 2
Assignment Details view, 12 – 5
Compensation Activity view, 12 – 8
Personal Information view, 12 – 3
search function, 12 – 14
Termination History view, 12 – 11

I

Individual Compensation Distributions (ICD), 13 – 40, 13 – 50
Instructions, 7 – 9
Item type, copying, 6 – 3

L

Legislation–specific functions, 5 – 6
Logo, replacing, 7 – 12

M

Main Address, 10 – 9
Manage Employee Events functions, 11 – 2
MEE functions, 11 – 2
Assignment, 11 – 4
chaining, 11 – 2
Change Location, 11 – 13
Change Manager, 11 – 23
ordering, 11 – 2
Other Employment Information, 11 – 19
Pay Rate, 11 – 21
Special Information Types (SIT), 11 – 16
Termination, 11 – 8
Work Schedule, 11 – 11
Menus
defining, 5 – 12
types of, 5 – 9

user access, 5 – 9
Messages, adding, 7 – 9

N

New Employee and Non–Employee Registration, 9 – 27, 9 – 36
New User Registration, 9 – 19
  and generic user ID, 9 – 21
  Create User Name, 9 – 41
  Create User Name process, 9 – 32
  New Employee and Non–Employee Registration, 9 – 27
  self–service user names and passwords, 9 – 35

O

Online Payslip, 14 – 10
Online Tax Form, 14 – 13
Oracle Self–Service Human Resources, 1 – 2
Ordering MEE functions, 11 – 2
Other Employment Information, 11 – 19
Other Professional Awards, 10 – 25

P

Pay Rate, 11 – 21
Payment Methods, 14 – 3
Payroll functions, 14 – 2
  Online Payslip, 14 – 10
  Online Tax Form, 14 – 13
  Payment Methods, 14 – 3
Person search, 5 – 2
Person Tree, 9 – 3
Personal information, 10 – 2
  Basic Details, 10 – 6
  Dependents and Beneficiaries, 10 – 16
  Emergency Contacts, 10 – 18
  Main Address, 10 – 9
  Phone Number, 10 – 14
  Secondary Address, 10 – 11
  summary page, 10 – 2
Personal Information view, 12 – 3
Phone Number, 10 – 14
Primary care providers, defining restrictions for selecting, 13 – 30
Primary care search provider facility, 13 – 33
Professional details, 10 – 21
  Academic Rank, 10 – 38
  Competence Profile, 10 – 28
  Education and Qualifications, 10 – 22
  Other Professional Awards, 10 – 25
  Resume, 10 – 34
  Tenure Tracking, 10 – 36
  Work Preferences, 10 – 32

R

Release Employee Information, 5 – 4, 9 – 11
Replacing Generic Approvals with Dynamic Approvals, 8 – 7
Responsibilities, 1 – 19
Resume, 10 – 34
Review and Confirm, 9 – 14

S

Save for Later, 3 – 10
Search, for persons, 5 – 2
Secondary Address, 10 – 11
Security, and user access, 5 – 2
Security profiles, 5 – 3
Self–service Benefits
  flexible benefits programs, 13 – 5
  Individual Compensation Distributions (ICD), 13 – 40, 13 – 50
  plan design considerations, 13 – 2
  scheduled enrollment dates, 13 – 27
  user access to, 13 – 13
Self–service enrollment, configuring text, 13 – 38
Self–service user names and passwords, 9 – 35

Special Information Types (SIT), 11 – 16
System requirements, 2 – 3

T

Tabbed regions, configuring, 7 – 6
Tenure Tracking, 10 – 36
Termination, 11 – 8
Termination History view, 12 – 11

U

User access
  and security, 5 – 2
  defining, 5 – 13
  menus, 5 – 9
  responsibilities, 5 – 2
  security profiles, 5 – 3
  to functions, 5 – 5
  to people, 5 – 2
User accounts, batch creation of, 5 – 18
User hooks
  for batch user creation, 5 – 25
  writing, 5 – 25
User menus, 1 – 19

W

Web pages, 3 – 7
  configuring, 7 – 4
  instructions, 7 – 9
  messages, 7 – 9
  removing Benefits Enrollment page, 13 – 29
Windows
  Communication Types, 13 – 36
  Enrollment Action Types, 13 – 39
  Maintain Plan Primary Care Providers, 13 – 30
Work Preferences, 10 – 32
Work Schedule, 11 – 11
Workflow, 6 – 2
  access levels, 6 – 3
  approvals, 8 – 4, 8 – 7
  attribute values, 6 – 7
  configuring objects, 6 – 5
  error processes, 6 – 8
  item types, 6 – 3
  objects, 6 – 3
Workflow attribute values, configuring, 6 – 7
Workflow error processes, configuring, 6 – 8
Workflow item type, copying, 6 – 3
Workflow objects
  configuring, 6 – 5
  copying, 6 – 3