

Oracle® Human Resources Management Systems

FastFormula User Guide

Release 11*i*

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Oracle Human Resources Management Systems FastFormula User Guide, Release 11i

Part No. B14471-02

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

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Human Resources Management Systems FastFormula User Guide*.

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

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

If you have never used Oracle HRMS, Oracle suggests you attend one or more of the Oracle HRMS training classes available through Oracle University

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

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

See Related Documents for more information about Oracle Applications product information.

See Related Documents on page x for more Oracle Applications product information.

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Structure

1 FastFormula

A Windows and their Navigation Paths

This section lists the default navigation paths for all the windows in Oracle HRMS as they are supplied. You can use task flow windows directly from the menu, or from the People and Assignment windows.

B Reports and Processes in Oracle HRMS

This section shows the default reports and processes in Oracle HRMS as they are supplied. The responsibility that you use determines which reports you can use and how you access them.

HRMS Glossary

Related Documents

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

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). 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.

Guides Related to This Product

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

Learn how to use Oracle HRMS to represent your enterprise. This includes setting up your organization hierarchy, recording details about jobs and positions within your enterprise, defining person types to represent your workforce, and also how to manage your budgets and costs.

Oracle Human Resources Management Systems Workforce Sourcing, Deployment, and Talent Management Guide

Learn how to use Oracle HRMS to represent your workforce. This includes recruiting new workers, developing their careers, managing contingent workers, and reporting on your workforce.

Oracle Human Resources Management Systems Payroll Processing Management Guide

Learn about wage attachments, taxes and social insurance, the payroll run, and other processes.

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

Learn how to use Oracle HRMS to manage your total compensation package. For example, read how to administer salaries and benefits, set up automated grade/step progression, and allocate salary budgets. You can also learn about setting up earnings and deductions for payroll processing, managing leave and absences, and reporting on compensation across your enterprise.

Oracle Human Resources Management Systems Configuring, Reporting, and System Administration in Oracle HRMS

Learn about extending and configuring Oracle HRMS, managing security, auditing, information access, and letter generation.

Oracle Human Resources Management Systems Implementation Guide

Learn about the setup procedures you need to carry out in order to successfully implement Oracle HRMS in your enterprise.

Oracle Human Resources Management Systems FastFormula User Guide

Learn about the different uses of Oracle FastFormula, and understand the rules and techniques you should employ when defining and amending formulas for use with Oracle applications.

Oracle Human Resources Management Systems Deploy Self-Service Capability Guide

Set up and use self-service human resources (SSHR) functions for managers, HR Professionals, and employees.

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMSi) in your environment.

Oracle Human Resources Management Systems Strategic Reporting (HRMSi) User Guide

Learn about the workforce intelligence reports included in the HRMSi product, including Daily Business Intelligence reports, Discoverer workbooks, and Performance Management Framework reports.

Implementing Oracle Approvals Management

Use Oracle Approvals Management (AME) to define the approval rules that determine the approval processes for Oracle applications. Download this guide from Oracle *MetaLink*, Note: 282529.1.

Oracle iRecruitment Implementation Guide

Set up Oracle *iRecruitment* to manage all of your enterprise's recruitment needs.

Oracle Learning Management User Guide

Set up and use Oracle Learning Management to accomplish your online and offline learning goals.

Oracle Learning Management Implementation Guide

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture 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 Oracle 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 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.

"About" Document

For information about implementation and user document, instructions for applying patches, new and changes setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

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 Oracle 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 define security, customize menus and online help, and manage concurrent processing.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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.

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 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*.

Oracle Applications Message Manual

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

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.

Oracle FastFormula Overview

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. They take input from a window, a database, or a process, such as a payroll run and they return values or messages. See *Uses for Oracle FastFormula*, page 1-3 for a description of the different ways to use formulas.

Oracle FastFormulas are made up of a number of different *components*. These can include assignment statements, different types of input and expressions.

When writing formulas there are standard *formula writing techniques* you should use. These ensure your formulas are easy to read, use and understand, not only by yourself but also by other people.

Finally, there are strict rules for components as to the words and punctuation you must use in a formula. These ensure Oracle FastFormula can correctly perform the calculations and validation you require. See *Formula Reference*, page 1-18 to find out the rules for a particular component.

Oracle FastFormula

What is Oracle FastFormula?

Oracle FastFormula is a simple way to write formulas using English words and basic mathematical functions. You can use information from your database in formulas without learning the database structure or a programming language.

How can you use formulas?

You can use formulas to:

- Calculate element pay values and run results during payroll processing.
- Check that element entry values are valid for an assignment.
- Check that entries made to a user table are valid.
- Specify the criteria for including an assignment in an assignment set.
- Create rules for benefits administration, such as eligibility determination
- Select the database information you want to display in a QuickPaint report, and perform calculations for the report.
- Specify the rules for skipping an element during payroll processing.

- Prepare records in the format you require for the magnetic tape writer. For most countries, the Oracle localization team has written the required formulas.
- Perform legislative checks during a payroll run.
- Specify the rules for Paid Time Off accrual plans, such as how much time is accrued and over what period, when new starters are eligible to begin accruing time, and how much time can be carried over to the next accrual term.
- Calculate the duration of an absence, given the start and end dates and times.
- Generate custom global person number sequences for employees, applicants, and contingent workers.
- Configure the people management templates in a number of ways, including supplying additional information to be available from fields on the template, and validating field entries.
- Validate forms by calling formulas from the Custom Library. Calling formulas from the Custom Library also allows you to easily create and maintain business rules.

For more information about calling formulas from PL/SQL, refer to the technical essay *Calling FastFormula from PL/SQL*, *Oracle HRMS Implementation Guide*.

When you write a formula, you specify for which of these purposes you will use it.

Are any formulas supplied?

Yes, formulas are predefined for all the tax calculations required for Oracle Payroll. You should not edit these formulas; you will automatically receive updates when tax rules change.

There are also a number of formulas predefined for accrual plans. You can use these formulas as supplied, or customize them to match the rules of your own plans.

When US and Canadian Payroll users define earnings and deductions, the system automatically generates the formulas required to process these elements. When necessary, you can edit these generated payroll formulas. In other legislations, some formulas may be predefined, and you can create as many other formulas as you require to process the elements you define.

Formulas for QuickPaint reports and assignment sets can be generated from criteria you enter in windows. You can edit these generated formulas to add more functionality.

Uses for Oracle FastFormula

Uses for Oracle FastFormula

You can use Oracle FastFormula to:

- Calculate your payrolls
- Define the rules for PTO accrual plans
- Define custom calculations for benefits administration
- Define QuickPaint reports
- Validate element inputs or user tables
- Edit assignment sets
- Calculate absence duration
- Configure people management templates
- Set up business rules and call them from other PL/SQL applications
- Define your Oracle Business Intelligence Systems reports
- Define collective agreements
- Define custom global person number sequences
- Define employment categories for EEO reports (US only)

Payroll Calculations

You can use predefined payroll formulas. When you receive Oracle Payroll, some formulas are predefined in your system. You cannot make any changes to these formulas, but you can copy them and modify the copies.

US and Canadian Payroll users can use Oracle FastFormula to edit the formulas the system generates for the earnings types, other payments and deductions you initiate in Oracle Payroll. You make these edits directly to the generated formula (not to a copy) using the Formula window.

All Oracle Payroll users can use FastFormula to write payroll calculations and skip rules for elements you define yourself to represent earnings and deductions. You can associate more than one formula with each element, to perform different processing for employee assignments with different statuses. US and Canadian Payroll users need only define their own elements and formulas for earnings and deductions with highly complex calculations requiring a number of different calls to the database.

You can write Payroll Run Proration formulas to run after the usual payroll formula and handle proration when employees start work or terminate mid-pay period, or when rates, grades, or other values change, requiring an element to be prorated.

PTO Accrual Plans

You can use Oracle FastFormula to edit the seeded Accrual type formulas, or to write your own. Each accrual plan needs two formulas: one to calculate gross accrual, and the other to return information to the PTO Carry Over process. You can optionally create a third formula if you want to use the Batch Element Entry (BEE) to make absence entries

against accrual plans. This formula is called by BEE to check whether an employee is eligible to use accrued PTO.

See: Accrual Formulas, *Oracle HRMS Compensation and Benefits Management Guide*

Benefits Administration

You can use Oracle FastFormula to augment the system's benefits administration features. Use formulas to configure your plan design to the requirements of your enterprise. For example, you can write a formula to calculate benefits eligibility for those cases where eligibility determination is most complex.

QuickPaint Reports

In the Define QuickPaint Report window, you can paste database items from a list into the Report Definition area and enter free text to label the data. When you save your QuickPaint Report definition, a formula is generated automatically. Formulas generated from QuickPaint do not include conditional logic or calculations. You may want to add these features, for example to sum up compensation elements or to report different data for different assignments.

Validation of Element Inputs or User Tables

You can use Oracle FastFormula to validate user entries into element input values using lookups or maximum and minimum values. However, if you need more complex validation, you can write a formula to check the entry.

You can also use a formula to validate entries into user tables that you define.

Assignment Sets

When you define assignment sets in the Assignment Set window, Oracle FastFormula generates a formula to define an assignment set from the criteria entered. However, you may want to change the sequence in which the set criteria are checked for each assignment.

Absence Duration

You can write a formula to calculate the duration of an absence from the start and end dates and times. Your localization team may have created a default formula, but you can override this with your own version.

Configuring People Management Templates

There are several ways you can use formulas to configure the people management templates:

- A Template Validation formula can check values entered in a field.
- A Template Information formula can specify information to be displayed from the right mouse menu when a user right-clicks in a field.
- A QuickPaint formula can return a text string to display in the Assignment field on the Maintenance window and in the Data Organizer.

- A QuickPaint formula can return message tokens that you can use in a notification message issued from template forms.

Calling FastFormula from PL/SQL

You can call formulas from PL/SQL applications. This enables direct access to data items and makes it possible to develop custom code for localized business rules.

More detailed information about calling FastFormula from PL/SQL can be found in the technical essay *Calling FastFormula from PL/SQL*, *Oracle HRMS Implementation Guide*.

Oracle Business Intelligence Systems (BIS) Reports

Using formulas you can configure your HRMS BIS reports so that they answer the business questions which are important to your enterprise. You can:

- Define how workforce should be counted within your enterprise for the Workforce reports.
- Set up information about how you want to record and report on regular and overtime hours for the Hours Worked Analysis report.
- Set up the standard hours for your enterprise for the Absence Analysis report.

Collective Agreements

Using formulas you can calculate whether a person is eligible to receive a collective agreement entitlement. This can be used when defining an eligibility profile to be used in conjunction with a collective agreement, instead of selecting criteria elements. You select the formula as a rule when defining the eligibility profile.

Global Person Numbering

When you select automatic local numbering for employees, applicants, or contingent workers, Oracle HRMS allocates person numbers from a sequence that is specific to the business group. When you select global numbering, Oracle HRMS allocates person numbers from a single sequence to workers of the relevant type throughout the enterprise.

You can replace the default local or global person number sequence with a custom global sequence by defining a formula for each person type, as appropriate. You may want to use a formula to provide an alphanumeric numbering scheme, for example, or some other variation of the default scheme for any or all person types. For example, you could use a custom global sequence for employees but use the default local or global sequence for applicants and contingent workers. Alternatively, you could use a custom sequence for all three person types by defining three formulas.

Employment Categories for EEO Reports (US only)

For the EEO4 and EEO5 reports you can use Oracle FastFormula to create a formula of employment categories. You can define a formula for each business group and the EEO reports will pick the list of employment categories from the formula.

Introduction to Formula Components

The following information uses a series of examples to help you understand how to use different components to build your Oracle formulas.

To start with a simple example, suppose you wanted to calculate the pay value for the element Wage by multiplying the number of hours an employee works each week by hourly rate. You could write this formula:

```
wage = hours_worked * hourly_rate
```

```
RETURN wage
```

Note: If you want to know the rules which govern the use of a specific component, refer to *Formula Reference*.

Assignment and Return Statements

The first line is an *Assignment statement* that simply assigns a value to the element Wage. The second line is a *Return statement* that passes back the Wage value to the payroll run.

Constants and Variables

In this example, the Wage value is calculated, but it could be a *constant* value, such as: **wage = 200**. To calculate the Wage value, Oracle FastFormula needs to get values for the *variables* hours_worked and hourly_rate. They are called variables because they can contain different values depending, in this example, on which assignment the payroll run is processing.

Data Types

Both variables and constants can be one of three data types:

- numeric
- text
- date

The variables in the Wage example are numeric.

Types of Input

We have said that Oracle FastFormula needs to get values for the variables hours_worked and hourly_rate. There are three ways it can do this:

- Receiving them as input when the formula is called.
- Finding the values in the database from *database items*.
- Using *global values*, which you enter in the Globals window.

To use a database item or global value in your formula, you simply refer to it by name. You can browse through lists of database items in the Formulas window. To use a value passed to the formula at run time, you must write an *Inputs statement*.

Input Statements

In our Wage example, suppose that `hours_worked` is an input value to the element Wage. To pass the element input values to the formula during a payroll run, you define an Inputs statement, as follows:

```
INPUTS ARE hours_worked

wage = hours_worked * hourly_rate

RETURN wage
```

The name you use in the Inputs statement must be the same as the name of the element input value, and multiple words must be joined by underscores. In this example, the input value `hours_worked` is numeric. If the input value is not numeric, you must tell Oracle FastFormula whether it is text or date. For example:

```
INPUTS ARE start_date (date)
```

Database Items

Suppose that `hourly_rate` is a standard rate taken from the Grade Rates table. This is an example of a database item. A database item has a label, or special piece of code, telling Oracle FastFormula the path to take to access the data. Oracle HRMS produces most of the database items you need without you taking any special action. These items include both information unique to your enterprise, which you hold in flexfield segments, and standard information such as assignment numbers and grades.

In the Formulas window, you pick database items from a list. You will see that the name of the database item for a grade rate called `hourly_rate` is actually `grade_hourly_rate_value`. This is the name you must use in your formula.

By this naming convention, Oracle FastFormula knows that `hourly_rate` is a database item from the Grade Rate table. But how does it know which `hourly_rate` to use from this table? It works this out from the *context* the payroll run provides for each element entry. The context identifies:

- the Business Group
- the element and element link
- the payroll and payroll run
- the employee and employee assignment.

Important: You should use an Inputs statement in preference to database items where possible because this is more efficient.

See: Writing Efficient Payroll Calculation Formulas, page 1-15.

Global Variables

Use global values to store information that does not change often, but you refer to frequently, such as Company Name, or company-wide percentages used to calculate

certain types of bonus. You define the global value and change its value using the Globals window.

See: Defining Global Values, page 1-227

Local Variables

Local variables exist in one formula only. You can change the value of a local variable by assigning it a value in an Assignment statement. In the Wage example, the variable wage itself is a local variable. It receives a value within the formula by the Assignment statement:

```
wage = hours_worked * hourly_rate
```

Note: You cannot change the value of input values, database items, or global values within a formula.

Functions

The Assignment statement in the wages example above uses a simple multiplication to calculate the value of the wages element. You can also use addition, subtraction, division, and a number of *functions*. For example:

```
bonus = GREATEST(days_at_work,163) + bonus_rate
```

Here the function GREATEST tells Oracle FastFormula to use the value of the variable days_at_work, if it is greater than 163, and otherwise to use the constant 163.

The data type of variables and constants determines how operators and functions act on the values. For example, the addition operator (+) can be used with numeric or text data, while division can be used with numeric data only.

There are special functions that convert variables from:

- numbers to text (TO_TEXT)
- dates to text (TO_TEXT)
- text to date (TO_DATE)
- text to number (TO_NUM)

See: Functions, page 1-27

Nested Expressions

The Assignment statement can use as many arithmetic operators and functions as you require. Each function or calculation is one *expression*, and you can nest expressions to create more complex calculations. You must use brackets to make clear to Oracle FastFormula the order in which the calculations are performed. For example:

```
ANNUAL_BONUS = trunc((((salary_amount/100)*  
  
bonus_percentage)/183)*(days_between(end_period_date,
```

```
start_date) + 1)), 2)
```

Oracle FastFormula begins calculating inside the brackets and from left to right, in the following steps:

1. `salary_amount/100`
2. `1. * bonus_percentage`
3. `2. / 183`
4. `days_between (end_period_date, start_date)`
5. `4. + 1`
6. `3. * 5.`
7. `TRUNC(6.,2)`

Notice that TRUNC is another function. It rounds a numeric value down to the number of decimal places specified after the comma (two in this case).

Incorporating Conditions

In our simple Wage element example, only one value is returned, and it is calculated in the same way for every assignment. However you may need to perform different calculations depending on the particular group of employee assignments, or the time of the year, or some other factors. You can do this by incorporating *conditions* in your formula.

Simple Conditions

For example:

```
IF age < 20 THEN

    training_allowance = 30

ELSE

    training_allowance = 0
```

The formula checks whether the condition (`age < 20`) is true or false. If it is true, the formula processes the statement that follows the word THEN. If the condition is not true, the formula ignores this statement and processes any statement that follows the word ELSE. The ELSE clause is optional.

Complex Conditions

In the example above, the condition compares a variable (`age`) to a constant (`20`). The condition can be more complex, comparing expressions that contain functions and arithmetic operators. For example:

```
IF (DAYS_BETWEEN(end_period_date, start_date)+1) >= threshold
```

DAYS_BETWEEN is another function.

We have seen two *comparators*: less than (<) and greater than or equal to (>=). A full list of the comparators you can use appears in the Reference section.

See: Formula Reference, page 1-18

WAS DEFAULTED

There is a special type of condition called WAS DEFAULTED. Use this to test whether a default value has been placed in an input value or database item. Default values are placed using the Default statement. For example:

```
DEFAULT FOR hourly_rate IS 3.00

X = hours_worked * hourly_rate

IF hourly_rate WAS DEFAULTED

THEN

    MSG = 'Warning: hourly rate defaulted'
```

In this example, if the database item hourly_rate is empty (NULL), the formula uses the default value of 3.00 and issues a warning message.

Combined Conditions

You can combine conditions using the *logical operators* AND, OR, NOT.

- Use AND if you want an action to occur when more than one condition is true. For example:

```
IF (days_between(end_period_date, start_date) + 1) >= 183

AND employee_status = 'FULL TIME'

THEN . . .
```

- Use OR if you want an action to occur when any one of two or more conditions is true. For example:

```
IF stock_level < 10000

OR order_size >= 1500
```

```
THEN . . .
```

- Use NOT if you want an action to occur when a condition is *not* true. For example:

```
IF NOT (months_between(purchase_date, system_date) => 60
```

```
THEN . . .
```

As with Assignment statements, you may need to use brackets to tell Oracle FastFormula in which order to test conditions. By default, NOT has the highest precedence, followed by AND then OR. So the following condition:

```
IF X = 6 AND NOT Y = 7 OR P >= 6
```

is interpreted as:

```
IF ((X = 6) AND (NOT (Y = 7))) OR (P >= 6)
```

How you use brackets can change dramatically the meaning of a formula.

Tip: Use brackets whenever you create multiple conditions, so that the meaning of the formula is clear to other readers.

Multiple Actions Based On Conditions

We have seen how to make conditions more complex. You can also make the actions performed as complex as you like. In our simple example above, the result of the condition was the assignment of a value to the variable `training_allowance`. As well as assigning values, you can perform calculations and return values.

For example, suppose you must check whether there are sufficient funds in a bank account before processing a withdrawal:

```
INPUTS ARE acct_balance,  
  
          acct (text),  
  
          debit_amt  
  
IF acct_balance >= debit_amt  
  
THEN  
  
(
```

```

        new_balance = acct_balance - debit_amt

        RETURN new_balance

    )

ELSE

(

    message = 'Account No. ' + acct + ' - Insufficient Funds'

    message2 = 'Account Balance is ' + TO_TEXT(acct_balance)

    RETURN message, message2

)

```

Notice that you can return two variables in the same Return statement.

Important: The brackets following THEN and ELSE are essential when you have multiple actions based on a condition. Without them, Oracle FastFormula processes the first statement conditionally and the other statements unconditionally.

Formula Writing Techniques

When writing formulas there are a number of techniques you should follow to ensure your formulas are easy to read, use and understand.

Commenting Formula

It is good practice to include comments in your formulas to explain to other people what the formula does.

So, for example, you can name your formula:

```
/* Formula: Attendance Bonus */
```

and write an explanation of your formula:

```
/* Use this formula to calculate the annual bonus for
clerical staff. Employees receive either a percentage of
their salary (if they have been present for 183 or more
days in the last six months), or a pro rata bonus (if they
have been in attendance for less than 183 days in the last
six months). */
```

Oracle FastFormula ignores everything between the comment delimiters: /* and */. You can place comments anywhere in a formula without affecting the formula's performance.

Caution: Do not put a comment within a comment. This causes Oracle FastFormula to return a syntax error.

You can use a comment to explain what part of your formula does. So, for example, you might want a comment explaining who decides the bonus percentage:

```
INPUTS ARE salary_amount,

           start_date (date),

           end_period_date (date),

           bonus_percentage /* decided at board level */
```

You can also use comments to 'comment out' parts of the formula you do not currently want to use. So, for example, you can include a fifth input of `employee_status`, ensuring that employees with a status of full time are awarded a bonus. However, as you do not yet have a range of statuses, you do not currently need the fifth input.

```
INPUTS ARE salary_amount,

           start_date (date),

           end_period_date (date),

           bonus_percentage /* decided at board level */

           /* employee_status (text) */
```

Use comments and white space freely when entering formulas. This makes the formulas easier to read and understand, and has no effect on performance or memory usage. Use

indentation for the same reason, especially when you are using brackets to control the order of processing.

It is good practice to include the following information in a comment at the beginning of a formula:

- Formula title and short statement of its purpose
- Description of formula inputs
- List of variables and constants that may require updating
- Description of the input values of the element that receives the formula's direct result
- Explanation of the formula's calculations
- Administrative information such as the name, address and telephone number of an office administering the earnings, deduction, or charge the formula affects
- The dates of formula modifications, the names of those entering the edits, and possibly the reasons for change

Alias Statements

Database items are named by the system when it creates them, and sometimes these names are too long to conveniently use in a formula. You cannot shorten the name of a database item (or a global value) itself, but you can set up an alternative shorter name to use within the formula. For example:

```
ALIAS as_overtime_qualifying_length_of_service AS ot_qls
```

In the rest of the formula, you can use the alias (in this example, `ot_qls`) as if it were the actual variable.

Important: Using an Alias is more efficient than assigning the database item to a local variable with a short name.

Default Statements

Use the Default statement to set a default value for an input value or a database item. The formula uses the default value if the database item is empty or no input value is provided when you run the formula. For example:

```
DEFAULT FOR hourly_rate IS 3.00
```

```
X = hours_worked * hourly_rate
```

```
IF hourly_rate WAS DEFAULTED
```

```
THEN
```

```
  MSG = 'Warning: hourly rate defaulted'
```

This example sets a default of 3.00 for the database item `hourly_rate`. If `hourly_rate` is empty (NULL) in the database, the formula uses the default value of 3.00. The formula uses the 'WAS DEFAULTED' test to detect when a default value is used, in which case it issues a warning message.

Important: You must use the Default statement for database items that can be empty. The Database Items window includes a check box labelled Default Required. This check box is checked for database items that can be empty. The Database Items window appears when you choose the Show Items button on the Formulas window.

Writing Efficient Payroll Calculation Formulas

The following guidelines are generally true for typical payroll runs:

- The longer an element's formula, the longer its processing time.
- The more elements entered for an assignment, the longer its processing time.
- One element associated with a lengthy formula usually processes faster than two related elements each associated with a short formula.
- The overall number of elements and formulas in the system has little effect on processing efficiency. It is the number of elements per assignment that affects processing time.

Variable Names and Aliases

To improve readability use names that are brief yet meaningful. Name length has no effect on performance or memory usage. Use Aliases if the names of database items or global values are long.

Input Statements

Use Input statements rather than database items whenever possible. This improves formula processing by as much as a factor of ten. It speeds up the running of your payroll by eliminating the need to access the database for the input values.

Inefficient:

```
Salary = Salary_annual_salary / 12
```

```
RETURN Salary
```

Efficient:

```
INPUTS ARE Annual_salary
```

```
Salary = Annual_salary / 12
```

```
RETURN Salary
```

Date Literals

Use the TO_DATE function only when the operand is a variable.

Inefficient:

```
start_date = TO_DATE ( '1992-01-12 00:00:00' )
```

Efficient:

```
start_date = '1992-01-12 00:00:00' (date)
```

Single Expressions

Use a single expression in straightforward formulas where this does not lead to confusion.

Inefficient:

```
Temp = Salary / Annualizing_factor
```

```
Tax = Temp * 3
```

Efficient:

```
Tax = (Salary / Annualizing_factor) * 3
```

Database Items

Do not refer to database items until you need them. People sometimes list at the top of a formula all the database items the formula might need, thinking this helps Oracle FastFormula process more quickly. However, this in fact slows processing by causing unnecessary database calls.

Inefficient:

```
S = Salary
```

```
A = Age
```

```
IF S < 20000 THEN
```

```
IF A < 20 THEN
```

```
Training_allowance = 30
```

```
ELSE
```

```
Training_allowance = 0
```

Efficient:

```
IF Salary < 20000 THEN
```

```
IF Age < 20 THEN
```

```
Training_allowance = 30
```

```
ELSE
```

```
Training_allowance = 0
```

The first example always causes a database fetch for Age whereas the second only fetches Age if Salary is less than 20000.

Balance Dimensions for UK HRMS

Wherever possible, use balance dimensions for single assignments only in formulas. Multiple assignments require more calculation, leading to slower processing time. The number of genuine multiple assignments in a payroll is not normally high, and the presence of a small number does not lead to any significant increase in overall processing time. There could be a problem, however, if you unnecessarily link balance dimensions for multiple assignments into general formulas.

Proration Formulas for UK HRMS

You set up proration formulas to enable element values to be calculated accurately if they change during a payroll period, for example, if an employee leaves the company or if their pay rate changes.

For more detailed information on proration, see the Technical Essay entitled Proration available on MetaLink (Technical Libraries/Human Resources Management Systems/Payroll/Documentation/United Kingdom).

Formula Reference

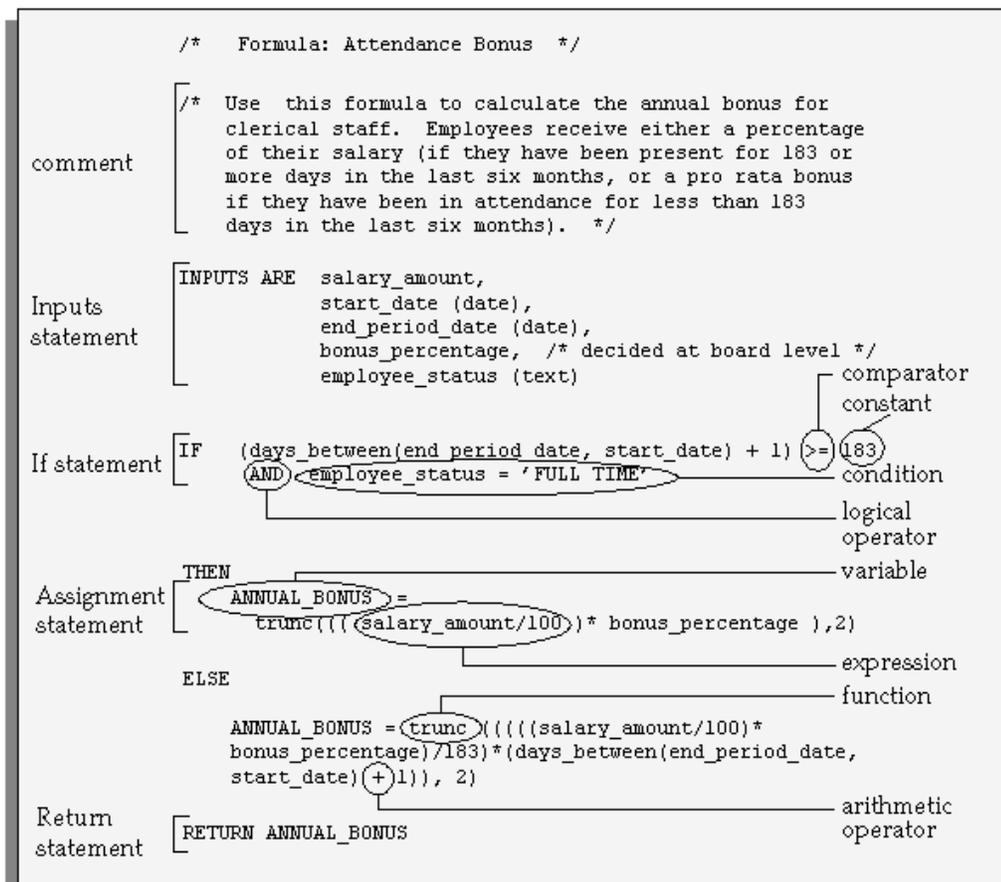
Formula Reference

Formulas comprise *statements* and *comments*. Statements are instructions telling Oracle FastFormula how to process *constants* and *variables*, which are the basic information units in a formula. The two key types of statement, which describe the formula's calculations, are the Assignment statement and the If statement. These statements can include *expressions*, which manipulate constants and variables using *arithmetic operators* and *functions*. The operators and functions you can use and the results they give depend upon the data type of the constants and variables. In If statements, one expression can be compared to another using *comparators* to create a *condition*. Conditions can be combined using *logical operators*.

There are rules about how you use each of these components. Refer to the component description for more detailed information.

An example of each of these formula components is identified in the sample formula.

Components in a Sample Formula



Input Values in Payroll Formulas

In many formulas for calculating pay, some or all of the information you need comes from the input values of the element.

For example, suppose you pay some salaried employees using a recurring element called Salary. The Salary element has an input value called `annual_salary`. You need a formula that divides the input value into twelve parts:

```
INPUTS ARE annual_salary
```

```
Salary = annual_salary/12
```

```
RETURN Salary
```

Important: When you use an Inputs statement, you need to make sure that none of the input values can have a value of null because this causes the formula to fail. You can avoid this problem by using the Default statement.

Using an Inputs statement is the most efficient way to access the input values of the element with which the formula is associated. However, if the formula uses the input values of other elements, it must access the database items for them.

For example, if you want to use the input value `annual_salary` in the formula to calculate the element Bonus, you use the database item as follows:

```
IF Salary_annual_salary > 20000
```

```
THEN
```

```
Bonus = bonus_rate * (sales_achieved - sales_threshold)
```

Notice that the database item name is in two parts: the input value (`annual_salary`) name prefixed by the element name (`Salary`). This is the naming convention for the database items of element input values.

Multiple Entries of Element Input Values

When you define an element, you can enable multiple entries of the element within a payroll period.

For example, suppose you use the element Wages to pay some weekly-paid employees. The Wages element has the input value `hours_worked`. Each week, you regularly make five entries for the input value `hours_worked`.

To calculate Wages, you can multiply the hours worked each day by the employee's standard rate from the grade rates table, so that your formula looks like this:

```
INPUTS ARE hours_worked
```

```
Wages = hours_worked * standard_rate
```

```
RETURN Wages
```

During the payroll run, the formula processes five times, creating five separate pay values, one for each entry.

Now consider using the database item `Wages_hours_worked` instead of an `Inputs` statement. The database item for an entry value **sums up** all the entries made in the payroll period.

This is a great convenience when referring to input value totals for a payroll period. However, you must be sure that it is the totals that you want to use. In this example, using the database item produces the wrong result.

`Wages_hours_worked` gives a single value that is the **sum** of the five entries in each weekly payroll period. When the payroll runs, the formula processes five times, each time calculating wages using the total hours worked in the week.

Important: If multiple entries are enabled for an element, be careful when using database items for the element's entry values. These database items hold the sum of all the entries. This includes entries made as indirect formula results during the payroll run.

Database Items for Numeric Values Only

Entry value database items are **not** created for input values with units of character, date, or time when multiple entries are enabled for the element. This is because entry values of these types cannot be summed over the payroll period. Only numeric values can be summed. Numeric input values are those with units of:

- Hours
- Integer
- Money
- Number

Notice that other database items, such as default, minimum, or maximum, may be created for non-numeric input values.

Constants

Every piece of information that you can manipulate or use in a formula is a constant or a variable.

The data type of a constant or variable describes what kind of data the constant or variable holds. Generally, you use constant and variables of the same data type in an expression.

Constants are actual values you use in a formula. Oracle FastFormula uses constants directly rather than holding them in a variable.

There are three types of constant:

- numeric

- text
- date

Numeric Constants

Enter numeric constants without quotes. Precede negative numbers with a minus sign (-). Numbers may have a decimal component after a decimal point. Do not use exponents and floating point (scientific) notations. So, for example, you cannot use 2^2 or $10e^{1.24}$ as numeric constants. Do not use commas or spaces in a number. So, for example, you cannot use 10,000 or 10 000.00 numeric constants.

Examples of valid numeric constants are:

- 63
- 3.55
- -2.3
- - 0.33
- - .2
- 10000

Text Constants

Enclose text constants in single quotes. They may contain spaces. You can represent the single quote character in a text constant by writing it twice ("). Note that this is not the same as the double quote ("). Examples of valid text constants are:

- 'J. Smith'
- 'P O''Donnell'
- '1234'
- 'Manager'
- '12 Union Road'
- 'The Bonus this year is 23%'

Date Constants

Date constants contain a date. Enclose dates in single quotes and follow immediately with the word *date*, in brackets. Use the format YYYY-MON-DD HH24:MI:SS or DD-MON-YYYY. It is recommended that you use the first format if you want to compile the formula under different language settings.

Examples of valid date constants are:

- '1989-03-12 00:00:00' (date)
- '12-MAR-1989' (date)

Variables

You use *variables* in a formula to access information. Variables can have frequently changing values.

The data type of a variable determines the type of information the variable holds:

- numeric
- text
- date

You do not have to specify what type you want a variable to be. Oracle FastFormula works out the type from how you use the variable. For example, if you set a variable to 'J. Smith', this is interpreted as a text variable.

The system also warns you if you try to perform any inconsistent operations, such as trying to add a number to a text string.

There are three classes of variable in Oracle FastFormula:

- **Local Variable** - Variables that occur in a single formula only.
- **Global Value** - Values that can occur in any formula.
- **Database Item** - Items that exist in the application's database.

The variable class determines how a formula uses it.

Local Variables

Local variables occur in a single formula only. You can change a local variable within the formula by assigning a value to it using an Assignment statement.

You can use local variables to store data in a formula. You might want to hold data temporarily while you perform some other calculations, or to pass data back to the application.

Below is an example showing the use of a local variable, `annual_leave`.

```
/* Formula: Annual Leave Formula */

IF years_service >= 10

THEN

    annual_leave = 25

ELSE

    annual_leave = 20 + FLOOR (years_service/2)

RETURN annual_leave
```

Global Values

Global values are visible from within any formula. Use global values to store information that does not change often, but you refer to frequently, such as company name, or a location allowance that applies to many employees. Global values are date tracked so you can make date effective changes ahead of time.

You can never change a global value using a formula. You alter global values using the Globals window. The global value is the same across all formulas within a Business Group.

See: Defining Global Values, page 1-227

Below is an example using a global value.

```
/* Formula: HAZARD ALLOWANCE FORMULA */

IF basic_hours > hazard_limit

THEN

    hazard_allowance = 2.30

ELSE

    hazard_allowance = 2.00

RETURN hazard_allowance
```

In this example, *hazard_limit* is a global value, which has been preset to reflect the point at which workers' hazard payment increases.

Database Items

Database items exist in the application database and have a label, hidden from users, that the system uses to find the data.

There are two types of database item:

- *Static* database items are predefined. They include standard types of information, such as the sex, birth date, and work location of an employee, or the start and end dates of a payroll period.
- *Dynamic* database items are generated from your definitions of:
 - elements
 - balances
 - absence types
 - grade rates and pay scale rates
 - flexfield segments

The name of your element, pay and input values, balance, absence type, grade rate, pay scale rate, or flexfield segment becomes part of the name of the generated database item. This helps you identify the database item you need when you display a list of all available items in the Formulas window.

Definitions of flexfield segments only become database items when you initiate the Declare Descriptive Flexfield process from the Submit Requests window. The other definitions become database items immediately when you save them to the database.

See:

Static Database Items, page 1-54

Dynamic Database Items, page 1-73.

Database items are specific to the *context* in which you use them. For example, using the database item `hourly_rate` gives the appropriate hourly rate for the specific assignment being processed.

Like global values, database item values cannot be changed within a formula.

Rules for Determining Variable Class and Data Type

The rules that determine the data type and class of variables in a formula are:

1. The variable can be an input you name in the Inputs statement. For example:

```
INPUTS ARE salary_amount,
```

```
start_date (date)
```

```
frequency (text)
```

If you do not specify the variable type in the statement, Oracle FastFormula assumes it is numeric.

2. If the variable is not an input, Oracle FastFormula looks in the list of global values the first time the variable occurs. If the variable is in the list, Oracle FastFormula determines the data type from there.
3. If the variable is not in the list, Oracle FastFormula searches the list of database items. Again, if it is in the list, Oracle FastFormula knows the data type.
4. Finally, if Oracle FastFormula does not find the variable in either the global values or the database items, then it treats the variable as a local variable. It determines the data type from the way you use the variable.

Notice that if the variable is either a global value or a database item, then any attempt in your formula to alter the value of the variable causes an error.

If the variable is a local variable, it does not contain a value when it is first used in the formula. Therefore you must assign a value to the variable before you try to use it in a condition or expression. If you fail to assign a value, Oracle FastFormula fails when you attempt to verify or run the formula.

Tip: To avoid a failure, assign values to your local variables when they first appear in your formula.

Naming Variables

Variables have names comprising one or more words. The words must be joined by underscores. The words must each start with an alphabetic character (A-Z) and can be followed by alphanumeric characters (A-Z, 0-9). The maximum size of a variable name is 80 characters.

Oracle FastFormula is not sensitive to case. So, for example, the variable called EMPLOYEE_NAME is the same as the variable Employee_name.

The following reserved words cannot be used as the names of variables:

| | | | |
|---------|-----------|--------|---------|
| ALIAS | AND | ARE | AS |
| DEFAULT | DEFAULTED | ELSE | EXECUTE |
| FOR | IF | INPUTS | IS |
| NOT | OR | RETURN | THEN |
| USING | WAS | | |

Also, any word consisting only of digits, as these could be mistaken for numbers.

You may find that the name of a database item or global value is too long to use conveniently in your formula. You can set up an alternative, shorter name for use within a formula. You set this up using the Alias statement.

See: Statements, page 1-45

Expressions

Expressions combine constants and variables with arithmetic operators (+, -, *, /) and functions to return a value of a certain data type. For example, the expression (3 + 2) returns a value of 5, and is of numeric data type.

The format of an expression is:

```
SUBEXPRESSION [operator SUBEXPRESSION ...]
```

This means that a number of 'subexpressions' can combine in a single expression. For example, the subexpressions (3 + 2) and MONTHS_BETWEEN(start_date, end_date) can combine in a single expression as follows:

```
(3 + 2) + MONTHS_BETWEEN(start_date, end_date)
```

Expressions can also be used inside functions, as in the following example:

```
salary = GREATEST(minimum_wage, (hourly_rate * hours_worked))
```

Data Type of Expressions

The rules for determining the data type of an expression are simple. Operands in an expression are normally of the same data type, and this is normally the data type of the

expression as a whole. For example, in the following expression all the operands are numeric and the expression itself is numeric:

```
GREATEST(minimum_wage, (hourly_rate * hours_worked))
```

There are some exceptions to this. For example:

```
DAYS_BETWEEN(date1, date2)
```

```
MONTHS_BETWEEN(date1, date2)
```

These have date operands, but return a numeric value.

So the expression:

```
4 + days_between(start_date, todays_date)
```

returns a numeric result.

Arithmetic Operators

An expression may contain arithmetic operators, which determine how variables and constants are manipulated. For example, the operator "+" indicates that two items should be added together.

The division, subtraction, and multiplication operators can only be used with numeric operands. The operands can be variables, constants, or subexpressions. A formula error occurs if:

- the result of subtraction is too large a negative number
- the result of multiplication is too large
- the second operand of a division evaluates to zero

In both cases, 'too large' here is determined by the normal limits in the ORACLE database.

The addition operator can be used with numeric or text operands. If the result is greater than 240 characters, a formula error occurs.

Notice that you enclose text constants in single forward quotes only ('), not double quotes ("). For example, the statements:

```
string1 = 'will '
```

```
result_string = 'Pigs ' + string1 + 'fly'
```

set the local variable **result_string** to 'Pigs will fly'.

Functions

Oracle FastFormula provides functions that manipulate data in different ways. Some functions work on only one type of data, some can work on two, others work on all three data types.

The functions are described below, separated into the three data types and functions that convert between data types. Where a function returns a different data type result than the data type of its operands, the description explains this.

Some functions retrieve data from Oracle Applications tables. These are described in the sections: Functions To Get Values from Tables, and Functions for Accrual Type Formulas. Some functions enable you to set and use globals in SQL*Plus. They are described in the section: Functions to Set and Get Globals.

The general form of a function is:

```
NAME OF FUNCTION(operand, operand, . . .)
```

Notice that, as with the operators, the operands of a function can be variables, constants, or complete expressions. If the operand is a text string, you must enclose it in quote marks.

Text Functions

CHR

CHR(*n*)

The CHR function returns the character having the binary equivalent to number operand *n* in the database character set.

Example

```
/* CHR (10) used to add a newline to the end of REPORT_TEXT2. */
```

```
REPORT_TEXT2 = 'Warning the Transaction Limit has been exceeded'
```

DEBUG

DEBUG(*expr*)

This function accepts a string and uses a DBMS_OUTPUT statement to output the string to the console. Use this function when you are testing a new formula to track its processing and identify where it is failing.

GREATEST

GREATEST(*expr*, *expr* [, *expr*] . . .)

GREATEST_OF(*expr*, *expr* [, *expr*] . . .)

The GREATEST function compares the values of all the text string operands. It returns the value of the operand that is alphabetically last. If there are two or more operands that meet the criteria, Oracle FastFormula returns the first.

INITCAP

INITCAP(*expr*)

The INITCAP function returns the expression *expr* with the first letter of each word in uppercase, all other letters in lowercase. Words are delimited by white space or characters that are not alphanumeric.

INSTR

INSTR(*expr1*,*expr2* [, *n* [, *m*]])

The INSTR searches *expr1* beginning with its *n*th character for the *n*th occurrence of *expr2* and returns the position of the character in *expr1* that is the first character of this occurrence. If *n* is negative, Oracle FastFormula counts and searches backward from the end of *expr1*. The value of *m* must be positive. The default values of both *n* and *m* are 1, meaning Oracle FastFormula begins searching at the first character of *expr1* for the first occurrence of *expr2*. The return value is relative to the beginning of *expr1*, regardless of the value of *n*, and is expressed in characters. If the search is unsuccessful (if *expr2* does not appear *m* times after the *n*th character of *expr1*) the return value is 0.

INSTRB

INSTRB(*expr1*,*expr2* [, *n* [, *m*]])

The same as INSTR, except that *n* and the return value are expressed in bytes, rather than in characters. For a single-byte database character set, INSTRB is equivalent to INSTR.

LEAST

LEAST(*expr*, *expr* [, *expr*] . . .)

LEAST_OF(*expr*, *expr* [, *expr*] . . .)

The LEAST function compares the values of all the text string operands. It returns the value of the operand that is alphabetically first. If there are two or more operands that meet the criteria, Oracle FastFormula returns the first.

LENGTH

LENGTH(*expr*)

The LENGTH function returns the number of characters in the text string operand *expr*.

Note: The data type of the result of this function is numeric.

LENGTHB

LENGTHB(*char*)

The LENGTHB function returns the length of *char* in characters. If *char* has datatype CHAR, the length includes all trailing blanks. If *char* is null, this function returns null.

LOWER

LOWER(*expr*)

The LOWER function returns the string operand *expr* with all letters lowercase. The return value has the same datatype as the argument *expr*.

LPAD

(expr, n [,pad])

The LPAD function returns the text string operand *expr* left-padded to length *n* with the sequence of characters in *pad*. The default for *pad* is a blank. If *expr* is longer than *n*, then LPAD returns the portion of *expr* that fits in *n*.

Examples:

```
/* A is set to 'XYXYXhello' */
```

```
A = LPAD ('hello', 10, 'XY')
```

```
/* A is set to 'hell' */
```

```
A = LPAD ('hello', 4 )
```

LTRIM

(expr [,set])

The LTRIM function returns the text string operand *expr* with all the leftmost characters that appear in *set* removed. The default for *set* is a blank. If none of the leftmost characters of *expr* appear in *set* then *expr* is returned

Examples:

```
/* A is set to 'def' */
```

```
A = LTRIM ('abcdef', 'abc')
```

```
/* A is set to 'abcdef' */
```

```
A = LTRIM ('abcdef', 'bc')
```

REPLACE

(expr, search_string [,replacement_string])

The REPLACE function returns the text string operand *expr* with every occurrence of *search_string* replaced with *replacement_string*. If *replacement_string* is omitted or null, all occurrences of *search_string* are removed. If *search_string* is NULL, *expr* is returned. REPLACE allows you to substitute one string for another as well as to remove character strings.

Example:

```
SELECT REPLACE ('JACK and JUE', 'J', 'BL') "Changes"
```

FROM DUAL

Changes

BLACK and BLUE

RPAD

(*expr*, *n* [,*pad*])

The RPAD function returns the text string operand *expr* right-padded to length *n* with the sequence of characters in *pad*. The default for *pad* is a blank. If *expr* is longer than *n*, then RPAD returns the portion of *expr* that fits in *n*.

Examples:

```
/* A is set to 'helloXYXYX' */
```

```
A = RPAD ('hello', 10, 'XY')
```

```
/* A is set to 'hell' */
```

```
A = RPAD ('hello', 4 )
```

RTRIM

(*expr* [,*set*])

The RTRIM function returns the text string operand *expr* with all the rightmost characters that appear in *set* removed. The default for *set* is a blank. If none of the rightmost characters of *expr* appear in *set* then *expr* is returned

Examples:

```
/* A is set to 'abc' */
```

```
A = RTRIM ('abcdef', 'def')
```

```
/* A is set to 'abcdef' */
```

```
A = RTRIM ('abcdef', 'de')
```

SUBSTRING

`SUBSTR(expr, m [,n])`

`SUBSTRING(expr, m [,n])`

The SUBSTRING function returns a substring of the text string operand *expr* of length *n* characters beginning at the *m*th character. If you omit the third operand, the substring starts from *m* and finishes at the end of *expr*.

Note: The first operand is a text operand. The second and third operands are numeric operands. The resulting data type of this function is text.

Tip: Always check string length before you start to substring. For example:

```
/* Check that the tax code starts with GG */

IF length(Tax_code) <= 2

THEN

    (message = 'Tax code is too short'

    RETURN message

    )

IF substr( Tax_code, 1, 2) = 'GG' THEN ...
```

Or, to check if Tax_code is a string of at least two characters starting with 'GG':

```
IF Tax_code LIKE 'GG%' THEN ...
```

SUBSTRB

`(expr, m [,n])`

The same as SUBSTR, except that the arguments *m* and *n* are expressed in bytes, rather than in characters. For a single-byte database character set, SUBSTRB is equivalent to SUBSTR.

TRANSLATE

`(expr, from, to)`

The TRANSLATE function returns the text string operand *expr* with all occurrences of each character in *from* replaced by its corresponding character in *to*. Characters in *expr* that are not in *from* are not replaced. The argument *from* can contain more characters

than *to*. In this case, the extra characters at the end of *from* have no corresponding characters in *to*. If these extra characters appear in *expr*, they are removed from the return value. Oracle FastFormula interprets the empty string as null, and if this function has a null argument, it returns null.

TRIM

`TRIM(trim_character FROM trim_source)`

The TRIM function allows you to trim heading or trailing characters (or both) from a character string. If *trim_character* or *trim_source* is a character literal, you must enclose it in single quotes. You can specify LEADING or TRAILING to remove leading or trailing characters. If you specify none of these, both leading and trailing characters are removed equal to *trim_character*.

UPPER

`UPPER(expr)`

The UPPER function converts a text string to upper case.

Numeric Functions

ABS

`ABS(n)`

The ABS function returns the magnitude of a numeric operand *n* as a positive numeric value.

If the value of the operand is positive, its value returns unchanged. If the operand is negative then the value's sign inverts, and the value returns as a positive number.

Example:

`ABS (-17)` returns 17

CALCULATE_HOURS_WORKED

`CALCULATE_HOURS_WORKED(n, date1, date2, standard_frequency)`

The CALCULATE_HOURS_WORKED function returns the total number of hours worked in a given date range.

The function works by calculating the total number of hours worked for an employee between *date1* and *date2*, taking into account that the employee works *n* hours in the standard working period *standard_frequency*. This parameter gives the unit of measurement for the standard working period. It can be one of:

- W (weekly)
- M (monthly)
- Y (yearly)

Example:

`CALCULATE_HOURS_WORKED (40, 01-FEB-2003, 28-FEB-2003, W)` returns 160

This indicates that the employee has worked 160 hours in the month of February 2003, based on a 40-hour week and taking into account the number of working days in that month.

FLOOR

FLOOR(*n*)

The FLOOR function returns the integer part of a numeric operand *n*.

If the value of the operand contains information after the decimal point, Oracle FastFormula discards that information and returns a whole number.

Example:

FLOOR(35.455) returns 35

GREATEST

GREATEST(*n*, *n* [, *n*] . . .)

GREATEST_OF(*n*, *n* [, *n*] . . .)

The GREATEST function compares all the operands and returns the largest value.

LEAST

LEAST(*n*, *n* [, *n*] . . .)

LEAST_OF(*n*, *n* [, *n*] . . .)

The LEAST function compares all the operands and returns the smallest value.

POWER

POWER(*m*,*n*)

Returns *m* raised to the *n*th power. The base *m* and the exponent *n* can be any numbers, but if *m* is negative, *n* must be an integer.

ROUND

ROUND(*n* [, *m*])

The ROUND function rounds off a numeric value *n* to *m* decimal places and a date depending on the format of *m*. For numeric values, the first operand is the value Oracle FastFormula rounds off, the second the number of places Oracle FastFormula rounds off to. For dates, ROUND returns *n* rounded to the unit specified by the format model of *m* such as Year or Day. Refer to the *SQL Language Reference Manual* for details of the valid formats you can specify.

Examples:

ROUND(2.3401, 2) returns 2.34

ROUND (2.3461, 2) returns 2.35

ROUND (TO_DATE('27-OCT-1992', 'DD-MON-YYYY'), 'YEAR') returns 01-JAN-1993

ROUNDUP

ROUNDUP(*n* [, *m*])

ROUND_UP(*n* [, *m*])

The ROUNDUP function rounds a numeric value *n* up to *m* decimal places. The first operand is the value to be rounded up, the second the number of places to round to. If the digits after the rounding point are zero, the value is unchanged. If the digits are not zero, the value is incremented at the rounding point.

Examples:

ROUND_UP(2.3401, 2) returns 2.35

ROUND_UP(2.3400, 2) returns 2.34.

TRUNC

TRUNC(*n* [, *m*])

TRUNCATE(*n* [, *m*])

The TRUNC function rounds a numeric value *n* down to *m* decimal places. The first operand is the value to be rounded down, the second the number of places to round to. TRUNC also returns *n* with the time portion of the day truncated to the unit specified by the format model of *m*. If you omit *m*, *d* is truncated to the nearest day. The default model, 'DD', returns the date rounded or truncated to the day with a time of midnight.

Oracle FastFormula drops all digits (if any) after the specified truncation point.

Examples:

TRUNC(2.3401, 2) returns 2.34.

TRUNC(TO_DATE('27-OCT-1992', 'DD-MON-YYYY'), 'YEAR') returns 01-JAN-1992

Date Functions

ADD_DAYS

ADD_DAYS(*date*, *n*)

The ADD_DAYS function adds a number of days to a date. The resulting date accords with the calendar.

Note: Oracle FastFormula ignores any fractional part of the number *n*.

Example:

ADD_DAYS ('30-DEC-1990' (date), 6) returns 5 JAN 1991

ADD_MONTHS

ADD_MONTHS(*date*, *n*)

The ADD_MONTHS function adds a number of months to a date. The resulting date accords with the calendar.

Note: Oracle FastFormula ignores any fractional part of the number *n*.

ADD_YEARS

ADD_YEARS(*date*, *n*)

The ADD_YEARS function adds a number of years to a date. The resulting date accords with the calendar.

Note: Oracle FastFormula ignores any fractional part of the number *n*.

GREATEST

GREATEST(*date1*, *date2* [, *date3*] . . .)

The GREATEST function compares all the operands and returns the latest date.

LAST_DAY

LAST_DAY(*d*)

The LAST_DAY function returns the date of the last day of the month that contains *d*. You might use this function to determine how many days are left in the current month.

LEAST

LEAST(*date1*, *date2* [, *date3*] . . .)

The LEAST function compares all the operands and returns the earliest date.

DAYS_BETWEEN

DAYS_BETWEEN(*date1*, *date2*)

The DAYS_BETWEEN function returns the number of days between two dates. If the later date is first, the result is a positive number. If the earlier date is first, the result is a negative number. The number returned is also based on the real calendar.

Note: The result is a numeric data type.

Example:

DAYS_BETWEEN('1995/06/27 00:00:00' (date), '1995/07/03 00:00:00' (date)) returns -5

MONTHS_BETWEEN

MONTHS_BETWEEN(*date1*, *date2*)

The MONTHS_BETWEEN function returns the number of months between two dates. If the later date is first, the result is a positive number. If the earlier date is first, the result is a negative number. The number returned is also based on the real calendar.

If the result is not a whole number of months (that is, there are some days as well), the days part is shown as a decimal.

Note: The result is a numeric data type.

NEW_TIME

NEW_TIME(*d*, *z1*, *z2*)

Returns the date and time in zone *z2* when the date and time in zone *z1* are *d*. The arguments *z1* and *z2* can be any one of these text strings:

| | |
|------------|--|
| AST or ADT | Atlantic Standard or Daylight Time |
| BST or BDT | Bering Standard or Daylight Time |
| CST or CDT | Central Standard or Daylight Time |
| EST or EDT | Eastern Standard or Daylight Time |
| GMT | Greenwich Mean Time |
| HST or HDT | Alaska-Hawaii Standard Time or Daylight Time |
| MST or MDT | Mountain Standard or Daylight Time |
| NST | Newfoundland Standard Time |
| PST or PDT | Pacific Standard or Daylight Time |
| YST or YDT | Yukon Standard or Daylight Time |

NEXT_DAY

`NEXT_DAY(d, expr)`

The `NEXT_DAY` function returns the date of the first weekday named by *expr* that is later than the date *d*. The argument *expr* must be a day of the week in your session's date language. The return value has the same hours, minutes, and seconds component as the argument *d*.

Data Conversion Functions

Use data conversion functions to convert from one data type to another data type. For example, you could have an expression returning a number value for salary, which you want to include in a printed message (that is, a character value). To print the number as part of the message, you need to convert the value of salary from a number to a character value, using the `TO_TEXT` function.

CONVERT

`(expr, dest_char_set [,source_char_set])`

The `CONVERT` function converts a character string from one character set to another. The *expr* argument is the value to be converted. The *dest_char_set* argument is the name of the character set to which *expr* is converted. The *source_char_set* argument is the name of the character set in which *expr* is stored in the database. The default value is the database character set.

INSTR

`(expr1,expr2[,n[,m]])`

The `INSTR` function searches *expr1* beginning with its *n*th character for the *m*th occurrence of *expr2* and returns the position of the character in *expr1* that is the first character of this occurrence. If *n* is negative, Oracle FastFormula counts and searches backwards.

NUM_TO_CHAR

NUM_TO_CHAR(*n*, *format*)

Converts the number *n* from number data type to text data type using the specified format. This function is equivalent to the SQL TO_CHAR function. For example:

```
NUM_TO_CHAR(amount, '$9,990.99')
```

This returns the amount with a leading dollar sign, commas every three digits, and two decimal places. Refer to the *SQL Language Reference Manual* for a full list of the valid number formats you can specify.

TO_DATE

TO_DATE (*expr* [, *format*])

Converts the expression *expr* of text data type to a date data type. The text expression must be of the form 'YYYY/MM/DD HH24:MI:SS' if no format is provided. The day and year must be in numeric form. For example:

```
/* legal */
```

```
date_1 = TO_DATE ('12 January 89', 'DD Month YY')
```

```
/* illegal */
```

```
date_1 = TO_DATE ('12 January Nineteen-Eighty-Nine',  
  
                  'DD Month Year')
```

Note: When assigning date variables from constants it is much more efficient to say:

```
date_1 = '1989/01/12 00:00:00'(date)
```

Note: The text expression must be in the format of either YYYY/MM/DD HH24:MI:SS or DD-MON-YYYY if no format is provided.

TO_NUMBER

TO_NUM(*expr*)

TO_NUMBER(*expr*)

Converts the expression *expr* of text data type to a number data type. The expression must represent a valid number. So for example, you cannot convert an expression such as 'Type 24' but you can convert the text expression '1234'. For decimal values, you must always use a period as a decimal point, for example '4.5'.

TO_TEXT

TO_TEXT(*n*) TO_TEXT (*date1* [, *format*])

TO_CHAR(*n*) TO_CHAR(*date1* [, *format*])

DATE_TO_TEXT(*n*) (*date1* [, *format*])

The TO_TEXT function converts:

- the number *n* from number data type to text data type. The default number format has the decimal point as a period, for example '4.5'.
- the date *date1* from date data type to text data type. The optional *format* should be a text string like 'DD/MM/YYYY'. The default format is 'YYYY/MM/DD HH24:MI:SS'.

For example:

```
birthdate = '21-JAN-1960' (date)

      msg = 'Birthdate is: ' + TO_CHAR (birthdate)

/* sets msg to 'Birthdate is: 1960/01/21 00:00:00' */

      msg = 'Birthdate is: ' + TO_CHAR (birthdate,

      'DD-MON-YY')

/* sets msg to 'Birthdate is: 21-JAN-60' */

      msg = 'Birthdate is: ' + TO_CHAR (birthdate,

      'DD Month Year')

/* sets msg to 'Birthdate is: 21 January Nineteen-Sixty' */
```

Functions to Get Values From Tables

GET_LOOKUP_MEANING

GET_LOOKUP_MEANING(*lookup_type* , *lookup_code*)

The GET_LOOKUP_MEANING function enables Oracle FastFormula to translate a lookup code into a meaning. This can be used for any descriptive flexfield items or developer flexfield items that are based on lookups.

Example:

```
GET_LOOKUP_MEANING ('ETH_TYPE', PEOPLE_GB_ETHNIC_ORIGIN)
```

GET_TABLE_VALUE

`GET_TABLE_VALUE(table_name, column_name, row_value [,effective date])`

The GET_TABLE_VALUE function returns the value of a cell in a user-defined table. The three text operands, which identify the cell (table_name, column_name, and row_value), are mandatory. The date operand is optional. If it is not supplied, the function returns the cell value as of the effective date.

You cannot use this function in formulas for user table validation or QuickPaint reports.

Example:

```
GET_TABLE_VALUE('WAGE_RATES', 'Wage Rate', Rate_Code)
```

RAISE_ERROR

`RAISE_ERROR(application_ID, message_name)`

This function allows you to raise a functional error message from within a formula. It accepts an Application ID and the message_name of an Oracle Applications error message to raise.

Example:

```
ERROR = RAISE_ERROR(800, 'error_name')
```

RATES_HISTORY

`RATES_HISTORY(element or rate type name, date, element or rate type indicator, time dimension)`

This function uses information stored in the UK Element Attribution Information EIT and information about the assignment's contract type to calculate a payment rate as of the given date and expressed for the selected time dimension (such as hourly or annual). If the element or rate type indicator is R, the function sums the rates for all elements classified with the given rate type (which is stored against the element in the Rate Type Information EIT).

The time dimension parameter must be A (annual), D (daily), H (hourly), or P (periodic). The element or rate type parameter must be R (rate type) or E (element).

The function can also adjust the returned rate for FTE and length of service, if these factors are set to Yes in the Element Attribution Information.

Functions for Accrual Type Formulas

In addition to the standard FastFormula functions, you may find the following functions useful for your Accrual and Carry Over formulas.

CALCULATE_PAYROLL_PERIODS

This function takes no parameters; it uses the payroll id context. It calculates the number of payroll periods in one year for that payroll, and sets the global variable `PAYROLL_YEAR_NUMBER_OF_PERIODS` to that value. For example, the function would set the global variable to 12 for a calendar month payroll.

Example:

```
E = CALCULATE_PAYROLL_PERIODS
```

GET_ABSENCE

`GET_ABSENCE(calculation date, start date)`

This function calculates the total amount of absence contributing to an accrual plan between two dates. It counts the whole of any absence that:

- has a start date and an end date, and
- starts on or between the two dates given as inputs

Example:

```
TOTAL_ABSENCE = GET_ABSENCE('01-JAN-1999'(date), '31-DEC-1999'(date))
```

GET_CARRY_OVER

`GET_CARRY_OVER(calculation date, start date)`

This function returns the number of days or hours recorded on the Carry Over element entry with an effective date on or between the two input dates. If more than one element entry is effective between these dates, the function sums the hours or days.

Carry Over element entries may also have an expiry date, after which any unused carry over is lost. If the calculation date is after the expiry date, the function checks the absences taken between start and calculation date. If the person took absences totaling the carry over, the function returns total carry over because it was all used before it expired. If absences total less than the carry over, the function returns total absence time; the rest of the carryover is lost.

For example, if the carry over is 10 days and 6 days absence were taken up to the expiry date, the function returns 6. The other four days of carry over have expired and been lost.

GET_NET_ACCRUAL

`GET_NET_ACCRUAL(calculation date, plan id, accrual start date, accrual latest balance)`

This function calls the accrual formula defined in the accrual plan to return the net accrual at the calculation date. The following contexts must be available to a formula calling this function: assignment id, payroll id, business group id, and assignment action id.

GET_OTHER_NET_CONTRIBUTION

`GET_OTHER_NET_CONTRIBUTION(calculation date, start date)`

This function calculates the total amount of net contribution other than absences or carry over between two dates. It looks for element entries for all elements that have been added in the Net Calculation Rules window. It sums the days or hours from all entries with an effective date on or between the two input dates.

GET_PAYROLL_PERIOD

GET_PAYROLL_PERIOD(*date*)

This function determines the payroll period spanning the input date and sets global variables containing the start and end date and the period number. It returns 0 if successful, and otherwise error.

This example shows how to use this function then use the GET_DATE and GET_NUMBER functions to retrieve the values it sets in the global variables:

```
E = GET_PAYROLL_PERIOD(Calculation_date)

Calculation_Period_SD = GET_DATE('PAYROLL_PERIOD_START_DATE')

Calculation_Period_ED = GET_DATE('PAYROLL_PERIOD_END_DATE')

Calculation_Period_PNUM = GET_NUMBER('PAYROLL_PERIOD_NUMBER')
```

GET_ACCRUAL_BAND

GET_ACCRUAL_BAND(*number*)

This function determines the appropriate accrual band for the specified length of service. It sets global variables containing the ANNUAL_RATE, UPPER_LIMIT and CEILING values for the band. ANNUAL_RATE is the amount that should accrue this accrual term. UPPER_LIMIT is the length of service that must be completed for the employee to go to the next accrual band. CEILING is the maximum number of hours or days the employee can accrue at any time. The function returns 0 if successful, and otherwise error.

This example shows how to use this function then use the GET_NUMBER function to retrieve the values it sets in the global variables:

```
IF (GET_ACCRUAL_BAND(Years_Service) = 0 THEN

(

Annual_Rate = GET_NUMBER('ANNUAL_RATE')

Upper_Limit = GET_NUMBER('UPPER_LIMIT')

Ceiling = GET_NUMBER('CEILING')

ELSE

( ... [processing for error] ....)

)
```

GET_ASSIGNMENT_STATUS

GET_ASSIGNMENT_STATUS(*date*)

This function determine the assignment status at a given date. It populates the globals ASSIGNMENT_EFFECTIVE_SD, ASSIGNMENT_EFFECTIVE_ED and ASSIGNMENT_SYSTEM_STATUS. It returns 0 if successful, and otherwise error.

Example:

```
ERROR = GET_ASSIGNMENT_STATUS('01-JAN-1999'(date))
```

GET_ASG_INACTIVE_DAYS

GET_ASG_INACTIVE_DAYS(*period start date, period end date*)

This function checks the assignment status on each day from period start date to period end date. It calls the function GET_WORKING_DAYS to calculate the total number of working days in the period (Mondays to Fridays) and subtracts the number of working days when the assignment was inactive. It returns the number of inactive working days.

GET_PERIOD_DATES

GET_PERIOD_DATES(*date1, unit, date2, number*)

This function determines the start and end dates of a period of time with the duration specified by the unit input and the number (such as 2 months). Valid units are D (days), M, (months), and W (weeks). The period spans date1 and starts on a date that is a multiple of the unit duration on from date2 (or backwards from date2).

The function populates the globals PERIOD_START_DATE and PERIOD_END_DATE. It returns 0 if successful, and otherwise error.

Example:

```
Error = GET_PERIOD_DATES('1-FEB-1999'(date), 'M', '15-DEC-1998'(date), 1)
```

This example populates PERIOD_START_DATE with 15-JAN-1999 and PERIOD_END_DATE with 14-FEB-1999.

An example where the period starts before date2:

```
Error = GET_PERIOD_DATES('1-FEB-1999'(date), 'M', '15-APR-1999'(date), 2)
```

This example populates PERIOD_START_DATE with 15-JAN-1999 and PERIOD_END_DATE with 14-MAR-1999.

GET_START_DATE

GET_START_DATE(*accrual start date, start of accrual term*)

This function returns the date at which the accrual formula should start calculating accruals.

- If there is no payroll balance holding gross accruals, the date is always the start of the accrual term.

- If there is a payroll balance and there are retrospective absence entries that have not already been used in an accrual calculation, the function returns the start date of the earliest of these entries.
- If there is a payroll balance and there are no unprocessed retrospective absence entries, the function returns accrual start date.

This date, which is passed into the accrual formula, is the day after either the Date Earned or the Date Paid of the last payroll period in which the assignment was processed--depending on the PTO Balance Type set for the business group.

Note: Although GET_START_DATE returns the start date of the earliest of any unprocessed retrospective element entries, this date is not currently used in the seeded accrual formulas. If GET_START_DATE finds any unprocessed retrospective element entries, the formula always calculates accruals from the beginning of the accrual term.

GET_WORKING_DAYS

GET_WORKING_DAYS(*start date, end date*)

This function returns the number of working days (Mondays to Fridays) in the period from start date to end date.

PUT_MESSAGE

PUT_MESSAGE(*expr*)

This function adds a message to the stack to be output at the end of the formula by the Accruals form.

Example:

```
E = PUT_MESSAGE('The assignment is not yet eligible for accrual')
```

Functions to Call a Formula

These functions allow you to call another formula, either once or in a loop. They require all the contexts available to the Accruals formula type.

CALL_FORMULA

CALL_FORMULA(*formula name*)

This function runs a named formula with no inputs and no outputs.

LOOP_CONTROL

LOOP_CONTROL(*formula name*)

This function repeatedly calls another formula, which must have the return parameter 'CONTINUE_LOOP'. The loop continues until the function detects a value other than 'Y' in CONTINUE_LOOP. If it detects 'N', the function returns 0 (success); if it detects another value, the function returns 1 (error).

Functions to Set and Get Globals

Using the following functions, you can set and use globals in SQL*Plus from within your formulas.

SET_TEXT, SET_NUMBER, SET_DATE

SET_TEXT(variable name, value)

SET_NUMBER(variable name, value)

SET_DATE(variable name, value)

These functions accept the name of a global variable and the value to be set. They determine whether the global exists and, if not, create a new global. They return 0 if successful and 1 if not successful.

Examples:

```
E = SET_NUMBER('UPPER_LIMIT', 0)
```

```
E = SET_DATE('CONTINUOUS_SERVICE_DATE', service_start_date)
```

GET_TEXT, GET_NUMBER, GET_DATE

GET_TEXT(variable name)

GET_NUMBER(variable name)

GET_DATE(variable name)

These functions accept the name of a global variable and return its value. If they cannot find the global, they return NULL.

Example:

```
Calculation_Period_SD = GET_DATE('PAYROLL_PERIOD_START_DATE')
```

CLEAR_GLOBALS

This function sets to NULL the value of all global variables that were set using SET_TEXT, SET_NUMBER, and SET_DATE. There are no inputs. It returns 0 if successful and 1 if not successful.

REMOVE_GLOBALS

This function removes all global variables. There are no inputs. It returns 0 if successful and 1 if not successful.

ISNULL

ISNULL(variable name)

A set of three functions that test whether a text, numeric, or date value is NULL. Returns Y if the value is NULL and N otherwise.

Example:

```
IF IS_NULL(VARIABLE_NAME) = 'Y' THEN  
ERROR = SET_NUMBER(VARIABLE_NAME, 0)
```

Comments

A formula may contain any number of comments, which can be placed anywhere in the formula.

Comments start with the sequence /* (slash asterisk), and finish with */ (asterisk slash). Oracle FastFormula ignores all text within these comment delimiters.

Caution: Do not put a comment within a comment. This causes Oracle FastFormula to return a syntax error.

Statements

Statements are instructions that Oracle FastFormula carries out. There are six types of statement you can use:

- Alias statement
- Assignment statement
- Default statement
- If statement
- Inputs statement
- Return statement

An If statement can have Assignment, Return, and other If statements nested within it, enabling you to build up powerful formulas.

Order of Statements

1. Alias statements (if any)
2. Default statements (if any)
3. Input statement (if any)
4. Other statements

Alias Statement

The format of the Alias statement is:

```
ALIAS varname1 AS varname2
```

where varname1 is the name of an existing database item or global value, and varname2 is a unique name not currently known to the system nor used previously in your formula.

Use the Alias statement to define another name, or alias, for existing variables in the system. You can declare aliases for database items and global values.

Alias statements must appear before any other statements in a formula.

Default Statement

The format of the Default statement is:

```
DEFAULT FOR <varname> IS <constant>
```

where varname is an input value or database item, and constant is a constant value matching the data type of varname.

Use the Default statement to set a default value for an input value or database item. The formula uses the default value if the database item is empty or the input value is not provided when you run the formula.

You can use the Default statement with the 'WAS DEFAULTTED' test to detect when a default value has been used. For example:

```
DEFAULT FOR hourly_rate IS 3.00

X = hours_worked * hourly_rate

IF hourly_rate WAS DEFAULTTED

THEN

    MSG = 'Warning: hourly rate defaulted'
```

This example sets a default of 3.00 for the database item hourly_rate. If hourly_rate is empty (NULL) in the database, the formula uses the default value of 3.00 and issues a warning message.

Important: You must use the Default statement for database items that can be empty. The Database Items window includes a check box labelled Default Required. This check box is checked for database items that can be empty. The Database Items window appears when you click the Show Items button on the Formulas window.

Inputs Statement

The format of the Inputs statement is:

```
INPUTS ARE varname1(data type)[, varname2 (data type)] ...
```

Use the Inputs statement to pass input values from an element into a formula.

For example,

```
INPUTS ARE bonus (number),
```

```
start_date (date)
```

You do not need to declare the type of number variables because this is the default data type. You can define up to 15 input values for an element.

The Inputs statement must appear before the other formula statements except:

- any Alias statements, which must always be at the top of the formula
- any Default statements that provide default values for input values

Input Variables or Database Items

Always use the Inputs statement to retrieve the input values of the element associated with the formula. Using a database item forces the formula to execute the code and work out the path to retrieve the database item.

For example, the formula below:

```
INPUTS ARE wage_rate,  
  
hours_worked  
  
wage = wage_rate * hours_worked  
  
RETURN wage
```

is more efficient than the second formula:

```
wage = wage_wage_rate * wage_hours_worked  
  
RETURN wage
```

Assignment Statement

Use the Assignment statement to set a value for a local variable. The format of the Assignment statement is:

```
varname = expression
```

For example:

```
rate = hourly_rate + 14  
  
wage = hours_worked * rate
```

Oracle FastFormula evaluates the expression on the right hand side of the statement, and places its result in the variable you name on the left hand side. The left side of an

Assignment statement must always be a local variable because a formula can only change the value of local variables.

IF Statement

Use the If statement to check a condition that controls whether a sequence of statements is executed.

There are two *clauses* in the If statement: the THEN and ELSE clauses.

- The THEN clause lets you define what to do if the conditions are true.
- The ELSE clause lets you define what to do if the conditions are not true.

The If statement is the only statement that can have other statements *nested* within it, including other IF statements.

Format of Statement

The format of the If statement is:

```
IF [NOT] condition
```

```
[logical operator] [NOT] condition
```

```
THEN
```

```
statement [statement ..]
```

```
ELSE
```

```
statement [statement ..]
```

The If statement can consist of a single condition, or two or more conditions combined with logical operators. The logical operators are AND, OR and NOT. The first two combine the conditions logically, and the third negates a condition:

- The AND operator means that if both conditions are true, then their combination is true.
- The OR operator means that if either condition is true, then their combination is true.
- If the NOT operator precedes a condition, this inverts the truth of the condition. That is, if condition X is true, then NOT X is false.

Format of Conditions

A condition itself has a valid format. This is:

```
expression comparator expression
```

The values represented by each expression are compared together in the way described by the comparator. The two expressions must both return the same data type. There

are eight comparators, and the way they work depends upon the data type of the values they are comparing.

| Comparator | Symbols | Data Types | Meaning |
|--------------------------|----------------|-------------------|---|
| Equals | = | All | The condition is true if both expressions have exactly the same value. For text, the case of the expression must be the same. So, for example, 'Smith' is not equal to 'SMITH'. |
| Not Equal to | != <> >< | All | The condition is true if the result of the first expression does NOT have the same value as the result of the second expression. |
| Greater than | > | All | The condition is true if the first expression is alphabetically after, or has a numerically greater value, or a later date than the second expression. |
| Less than | < | All | The condition is true if the first expression is alphabetically before, or has a numerically smaller value, or an earlier date than the second expression. |
| Greater than or equal to | >= => | All | The condition is true if either the greater than OR the equal to comparator returns a true result. |
| Less than or equal to | <= =< | All | The condition is true if either the less than OR the equal to comparator returns a true result. |

| Comparator | Symbols | Data Types | Meaning |
|------------|----------|------------|--|
| Like | LIKE | Text | <p>The condition is true if the two text expressions match according to the rules of the LIKE syntax. You can include Wildcards in the text to allow searching for text that matches a pattern, or words that begin with a certain sequence of letters.</p> <ul style="list-style-type: none"> - percent sign (%) matches any number of characters in that position - underscore (_) matches a single character occurrence in that position. |
| Not Like | NOT LIKE | Text | <p>The condition is true if the two text expressions do NOT match according to the rules of the LIKE syntax.</p> |

There is a special comparator called WAS DEFAULTED that you can use to test database items and input values. If there is no value available for an input value or database item, the formula uses a default value. The condition containing the WAS DEFAULTED comparator is True if a default value was used. For example:

```

DEFAULT FOR employee_middle_name IS ' '

IF employee_middle_name WAS DEFAULTED

THEN

/* special processing */

```

Correct Use of Brackets

If you group more than one statement under the THEN or ELSE clauses, enclose the group of statements within brackets, that is (and). In the absence of brackets, Oracle FastFormula conditionally executes *only* the statement that immediately follows the THEN or ELSE clause. Any other statements are executed unconditionally. For example, when the following formula runs, High_salary is always set to Y:

```

High_salary = 'N'

IF Salary > 20000

    THEN Tax = Salary * .25

        High_salary = 'Y'

```

To prevent this, use brackets as follows:

```

High_salary = 'N'

IF Salary > 20000

    THEN

    (

        Tax = Salary * .25

        High_salary = 'Y'

    )

```

Return Statement

Use the Return statement to return values in local variables to the application. Oracle FastFormula can pass back any number of variables. The variable does not need to contain a value.

Example:

```

/* Formula: LONDON ALLOWANCE FORMULA */

INPUTS ARE this_months_extra (number)

London_allowance = (grade_pay/20 + this_months_extra)

RETURN London_allowance

```

Notice that you do not have to declare the data type of local variables in the Return statement (as the formula already knows the data type).

Oracle FastFormula stops executing the formula when it reaches the Return statement. Any statements after the Return statement are ignored.

Formula Compilation

When you have created or edited a formula in the Formula window, you choose the Verify button to compile it.

If you need to compile many formulas at the same time, you can run the Bulk Compile Formulas process in the Submit Requests window. For example, you run this process when you upgrade your legislative information, which includes formulas.

Note: If you make any changes to a function after you have compiled a formula that uses it, you need to recompile the formula for the changes to take effect.

Formula Errors

There are two types of error that can occur when using Oracle FastFormula:

- Verify-time errors occur in the Formulas window when you run the formula verification. An error message explains the nature of the error.

Common verify-time errors are syntax errors resulting from typing mistakes.

- Run-time errors occur when a problem arises while a formula is running. The usual cause is a data problem, either in the formula or in the application database.

The basic Oracle FastFormula errors that can occur at run-time are:

- **Uninitialized Variables:** An uninitialized local variable is one that has no value when the formula runs. The term 'uninitialized' means you have not assigned any value to the variable before you try to use it. This causes an error in all statements except the Return statement. For example:

```
IF    (tax_band < 2000)

      THEN tax = salary / 8

IF    (tax_band > 2000)

      THEN tax = salary / 10

IF tax > 1000

      THEN ...
```

This formula fails with an 'Uninitialized variable' message (for the variable tax) if the tax band is set to 2000.

- **Divide by Zero:** Dividing a number by zero is an operation that provides no logical result. If this situation ever arises, Oracle FastFormula passes a code back to the application indicating an error (the application then takes the appropriate action).

Always check for the possibility of a divide by zero error if there is any chance it could occur. For example, the formula:

```
x = salary/contribution_proportion
```

produces an error if the contribution proportion is set to zero. In this formula, check for the divide by zero condition as follows:

```
IF    contribution_proportion = 0

THEN (message = 'The contribution proportion is not
valid.' RETURN message)

ELSE x = salary/contribution_proportion
```

- **No Data Found:** A database item supposed to be in the database was not found. This represents an error in the application data.
- **Too Many Rows:** The database item definition within the application caused more than one value to be fetched from the database.
- **Value Exceeded Allowable Range:** This can occur for a variety of reasons such as:
 - exceeding the maximum allowable length of a string (which is 240 characters)
 - rounding up a number to an excessive number of places, for example, round (1,100)
 - using an invalid date, for example, 39-DEC-1990.
- **Invalid Number:** This occurs only when a database item contains an item that does not make sense as a number.
- **Null Data Found:** A database item was found to have a null value when it should have had a non-null value. Use the Default statement for database items marked as Default Required in the Database Items window.

Database Items

This topic lists the database items available to you in Oracle HRMS for writing formulas and defining QuickPaint reports. The database items are grouped into two listings:

- *Static Database Items*, page 1-54
- *Dynamic Database Items*, page 1-73

Static database items are shipped with the system and you cannot modify them. Dynamic database items are created by Oracle HRMS processes whenever you define new elements or other related entities.

Static Database Items

Static database items are shipped with the system and you cannot modify them.

Accrual Plan Information

| Database item | Description |
|----------------------------------|--|
| ACP_CARRIED_OVER_DATE | The effective date stored in the latest Carry Over element entry for the assignment and accrual plan |
| ACP_CARRIED_OVER_PTO | The amount of PTO stored for an assignment in the latest Carry Over element entry |
| ACP_CATEGORY | The category of accrual plan |
| ACP_CONTINUOUS_SERVICE_DATE | An employee's adjusted service date |
| ACP_ENROLLMENT_END_DATE | The end date of an employee's enrollment in the accrual plan |
| ACP_ENROLLMENT_START_DATE | The start date of an employee's enrollment in the accrual plan |
| ACP_INELIGIBLE_PERIOD_LENGTH | The length of the plan's ineligibility period (a number) |
| ACP_INELIGIBLE_PERIOD_TYPE | The units (e.g. months) for measuring the length of the plan's ineligibility period |
| ACP_NAME | The name of the accrual plan |
| ACP_SERVICE_START_DATE | The start date of an employee's period of service |
| ACP_START | The rule for determining the start date for new hires in the plan |
| ACP_TERMINATION_DATE | The end date of an employee's period of service |
| ACP_UOM | The units (hours or days) for accumulating PTO |
| PTO_ACCRUAL_PLAN_ID | The id of the accrual plan. |
| PTO_DATE_PAID_CALCULATION_DATE | The last day of the period for calculating accruals in the payroll run (when the PTO Balance Type for the business group is Date Paid) |
| PTO_DATE_EARNED_CALCULATION_DATE | The last day of the period for calculating accruals in the payroll run (when the PTO Balance Type for the business group is Date Earned) |

| Database item | Description |
|----------------------------|---|
| PTO_DATE_PAID_START_DATE | The first day of the period for calculating accruals in the payroll run (when the PTO Balance Type for the business group is Date Paid) |
| PTO_DATE_EARNED_START_DATE | The first day of the period for calculating accruals in the payroll run (when the PTO Balance Type for the business group is Date Earned) |

Applicant Information

| Database item | Description |
|----------------------|---------------------------------------|
| APL_DATE_END | The date the application ended |
| APL_DATE_RECEIVED | The date the application was received |

Assignment Address Detail (US/UK only)

| Database item | Description |
|-----------------------|--|
| PER_ADR_UK_COUNTY | The assignment's home county (UK only) |
| PER_ADR_US_COUNTY | The assignment's county (US only) |
| PER_ADR_US_STATE | The assignment's state (US only) |
| PER_ADR_US_STATE_CODE | The assignment |

Contact Addresses

| Database item | Description |
|----------------------|--|
| CON_ADR_CITY | The name of the contact's town or city |
| CON_ADR_COUNTRY | The name of the contact's country |
| CON_ADR_DATE_FROM | The first date on which the contact can be contacted |
| CON_ADR_DATE_TO | The last date on which the contact can be contacted |
| CON_ADR_LINE_1 | The first line of the contact's address |
| CON_ADR_LINE_2 | The second line of the contact's address |
| CON_ADR_LINE_3 | The third line of the contact's address |
| CON_ADR_PHONE_1 | The contact's first telephone number |
| CON_ADR_PHONE_2 | The contact's second telephone number |
| CON_ADR_PHONE_3 | The contact's third telephone number |
| CON_ADR_POSTAL_CODE | The contact's postal code |
| CON_ADR_REGION_1 | The first line of the contact's region |
| CON_ADR_REGION_2 | The second line of the contact's region |
| CON_ADR_REGION_3 | The third line of the contact's region |

Contact Information

| Database item | Description |
|----------------------|---|
| CON_AGE | The contact's age |
| CON_APP_NUMBER | The contact's applicant number |
| CON_BENEFICIARY_FLAG | The contact's beneficiary flag |
| CON_CURRENT_APP | Whether the contact is a current applicant (yes/no) |
| CON_CURRENT_EMP | Whether the contact is a current employee (yes/no) |
| CON_CURRENT_CWK | Whether the contact is a current contingent worker (yes/no) |
| CON_CWK_NUMBER | The contact's contingent worker number |
| CON_DATE_END | The end date of the contact's relationship |

| Database item | Description |
|-----------------------------|--|
| CON_DATE_START | The start date of the contact's relationship |
| CON_DATE_OF_BIRTH | The contact's date of birth |
| CON_DEPENDENT_FLAG | The contact's dependent flag |
| CON_DISABLED | Whether the contact is disabled (yes/no) |
| CON_EMP_NUMBER | The contact's employee number |
| CON_END_DATE | The date to which this contact information is effective |
| CON_END_LIFE_REASON_ID | ID for the reason for the end of the relationship |
| CON_FIRST_NAME | The contact's first name |
| CON_FULL_NAME | The contact's full name |
| CON_KNOWN_AS | The contact's preferred name |
| CON_LAST_NAME | The contact's last name |
| CON_MARITAL_STATUS | The contact's marital status |
| CON_MIDDLE_NAMES | The contact's middle names |
| CON_NATIONAL_IDENTIFIER | The contact's national identifier |
| CON_NATIONALITY | The contact's nationality |
| CON_PERSONAL_FLAG | Personal relationship flag |
| CON_PERSON_TYPE | The contact's person type - employee or applicant, for example |
| CON_RLTD_PER_RSIDS_W_DSGNTR | Whether the contact shares the same residence as the employee. |
| CON_RELATIONSHIP | The relationship of the contact to the employee |
| CON_SEQUENCE_NUMBER | Contact's sequence number |
| CON_SEX | The contact's sex |
| CON_START_DATE | The date from which this contact information is effective |
| CON_START_LIFE_REASON_ID | ID for reason for the start of the relationship |
| CON_THIRD_PARTY_PAY_FLAG | Third party payments relationship flag |

| Database item | Description |
|----------------------|-------------------------------------|
| CON_TITLE | The contact's title |
| CON_WORK_PHONE | The contact's work telephone number |

Contingent Worker

| Database item | Description |
|-------------------------|---|
| CWK_START_DATE | The contingent workers's start date |
| CWK_END_DATE | The contingent worker's end date |
| CWK_PROJ_END_DATE | The contingent worker's projected end date |
| CWK_LEAVING_REASON | The reason the contingent worker left |
| CWK_LEAVING_REASON_CODE | The code of the reason the contingent worker left |

Contracts Information

| Database item | Description |
|----------------------|-------------------------|
| CTR_STATUS_MEANING | Contract status meaning |
| CTR_TYPE_MEANING | Contract type meaning |
| CTR_STATUS | Contract status code |
| CTR_TYPE | Contract type code |

Date Information

| Database item | Description |
|----------------------|--------------------------------------|
| SESSION_DATE | The effective date from FND_SESSIONS |
| SYSDATE | The system date |

Element Type Details

| Database item | Description |
|-------------------------|--|
| CURRENT_ELEMENT_TYPE_ID | The type ID of the element being processed |
| ELEMENT_NAME | The name of the element being processed |
| ENTRY_END_DATE | The end date of the original entry |
| ENTRY_START_DATE | The start date of the original entry |

Employee Assignment Information

| Database item | Description |
|------------------------------|--|
| ASG_ASSIGNMENT_CATEGORY | The category for the assignment |
| ASG_ASSIGNMENT_SEQUENCE | This is used as a default for assignment number |
| ASG_BARGAINING_UNIT_CODE | The employee's bargaining unit code |
| ASG_CHANGE_REASON | The change reason for the assignment |
| ASG_DATE_FROM | The date from which this assignment information is effective |
| ASG_DATE_TO | The date to which this assignment information is effective |
| ASG_EMPLOYMENT_CATEGORY | The employment category for the assignment |
| ASG_EMPLOYMENT_CATEGORY_CODE | The employment category code for the assignment |
| ASG_END_TIME | The standard end time for the assignment |
| ASG_FREQ | The frequency for which the assignment working hours are measured |
| ASG_FREQ_CODE | The working hours frequency code for the assignment |
| ASG_FTE_VALUE | The full-time equivalent budget actual value for the assignment |
| ASG_FULL_TIME_FREQ | The full-time frequency for the assignment |
| ASG_FULL_TIME_HOURS | The full-time working hours for the assignment |
| ASG_GRADE | The employee's grade |
| ASG_GRADE_DATE_FROM | The date from which this assignment grade information is effective |

| Database item | Description |
|-------------------------------|---|
| ASG_GRADE_DATE_TO | The date to which this assignment grade information is effective |
| ASG_GROUP | The employee's group |
| ASG_HEAD_VALUE | The head budget value for the assignment |
| ASG_HOURS | The standard number of working hours for the assignment |
| ASG_INT_ADDR_LINE | The internal address of the assignment |
| ASG_JOB | The employee's job |
| ASG_JOB_DATE_FROM | The date from which this assignment job information is effective |
| ASG_JOB_DATE_TO | The date to which this assignment job information is effective |
| ASG_LABOUR_UNION_MEMBER_FLAG | Whether the assignment is a union member |
| ASG_LAST_CHANGE_REASON | The reason the salary was changed |
| ASG_LAST_EARNED_PAYROLL_NAME | The payroll name the assignment was last processed with as at the date earned |
| ASG_LAST_EARNED_PERIOD_ID | The time period ID the assignment was last processed with as at the date earned |
| ASG_LAST_EARNED_PERIOD_NAME | The time period name the assignment was last processed with as at the date earned |
| ASG_LAST_EARNED_PERIOD_NUMBER | The time period number the assignment was last processed with as at the date earned |
| ASG_LAST_PERFORMANCE_DATE | Last performance review date |
| ASG_LAST_PERFORMANCE_LOCATION | Last performance review location |
| ASG_LAST_PERFORMANCE_RATING | Last performance review rating |
| ASG_LAST_PERFORMANCE_TYPE | Last performance review type |
| ASG_LAST_PROC_PAYROLL_NAME | The payroll name the assignment was last processed |
| ASG_LAST_PROC_PERIOD_ID | The time period ID the assignment was last processed |
| ASG_LAST_PROC_PERIOD_NAME | The period name the assignment was last processed |
| ASG_LAST_PROC_PERIOD_NUMBER | The period number the assignment was last processed |

| Database item | Description |
|----------------------------------|--|
| ASG_LAST_PROPOSED_SALARY_CHANGE | The proposed salary change |
| ASG_LAST_PROPOSED_SALARY_PERCENT | The proposed salary change as a percentage |
| ASG_LAST_SALARY_CHANGE_APPROVED | Whether the last proposed salary change has been approved |
| ASG_LAST_SALARY_DATE | The last salary change date |
| ASG_LOCATION | The employee's location |
| ASG_LOC_INACTIVE_DATE | The date to which the location information is effective |
| ASG_MANAGER | Whether the assignment is a managerial assignment (yes/no) |
| ASG_MONEY_VALUE | The assignment's money budget actual value |
| ASG_NEXT_PERFORMANCE_DATE | Next performance review date |
| ASG_NEXT_SALARY_DATE | The date of the next salary change |
| ASG_NUMBER | The assignment number |
| ASG_ORG | The employee's organization |
| ASG_ORG_DATE_FROM | The date from which assignment organization information is effective |
| ASG_ORG_DATE_TO | The date to which assignment organization information is effective |
| ASG_ORG_INT_EXT | The assignment organization internal external flag |
| ASG_ORG_LOCATION | The location of the assignment organization |
| ASG_ORG_TYPE | The assignment organization type |
| ASG_PAYROLL | The employee's payroll |
| ASG_PERFORMANCE_REVIEW_FREQUENCY | The performance review period for the assignment |
| ASG_PERFORMANCE_REVIEW_PERIOD | The performance review frequency for the assignment |
| ASG_PER_STATUS_DP | Personal status for the assignment (as of Date Paid) |
| ASG_PFT_VALUE | The PFT budget value for the assignment |

| Database item | Description |
|--------------------------------|---|
| ASG_POS_HOURS | The standard number of working hours for the position |
| ASG_POSITION | The employee's position |
| ASG_POS_DATE_FROM | The date from which this assignment position information is effective |
| ASG_POS_DATE_TO | The date to which this assignment position information is effective |
| ASG_POS_END_TIME | The standard end time for the assignment position |
| ASG_POS_FREQ | The frequency for which the assignment position's hours are measured |
| ASG_POS_FREQUENCY | The frequency for which the assignment position's hours are measured |
| ASG_POS_FTE | The assignment position FTE |
| ASG_POS_LOCATION | The location of the assignment position |
| ASG_POS_PROB_PERIOD | The probation period for the assignment position (in numeric format) |
| ASG_POS_PROBATION_PERIOD | The probation period for the assignment position (formatted as text) |
| ASG_POS_PROBATION_PERIOD_UNITS | The units used to measure the probation period |
| ASG_POS_START_TIME | The standard start time for the assignment position |
| ASG_POS_WORKING_HOURS | The standard number of working hours for the position |
| ASG_PRIMARY | Whether this is the employee's primary assignment (yes/no) |
| ASG_PRIMARY_CODE | The assignment's primary code |
| ASG_PROB_END_DATE | The probation period end date |
| ASG_PROB_PERIOD | The assignment's probation period |
| ASG_PROB_UNITS | The units of the assignment's probation period |
| ASG_REC_FULL_NAME | The full name for the recruiter |
| ASG_RELIEF | The relief position if the current position holder is absent |
| ASG_SALARY | The current salary for an employee |

| Database item | Description |
|---|---|
| ASG_SALARY_BASIS | The payment basis (i.e. frequency) for the assignment, e.g. monthly |
| ASG_SALARY_BASIS_ANNUALIZATION_FACTOR | The payment basis pay annualization factor for the assignment |
| ASG_SALARY_BASIS_CODE | The payment basis lookup code for the assignment |
| ASG_SALARY_BASIS_GRADE_ANNUALIZATION_FACTOR | The payment grade basis pay annualization factor for the assignment |
| ASG_SALARY_BASIS_NAME | The salary basis name for the assignment |
| ASG_SALARY_ELEMENT | The display element name |
| ASG_SALARY_ELEMENT_VALUE_NAME | The display input value name |
| ASG_SALARY_GRADE_RATE | The display rate name |
| ASG_SALARY_RATE_BASIS | The salary rate basis |
| ASG_SALARY_REVIEW_FREQUENCY | The salary review frequency for the assignment |
| ASG_SALARY_REVIEW_PERIOD | The salary review period for the assignment |
| ASG_START_DATE | The start date of the assignment |
| ASG_START_TIME | The standard start time for the assignment |
| ASG_STATUS | The primary status for the assignment |
| ASG_SUCESSOR | The position name that will succeed into this position |
| ASG_SUP_FULL_NAME | The full name for the supervisor |
| ASG_TYPE | Whether this is an employee or applicant assignment |
| ASG_VACANCY | The name of the vacancy applied for |
| ASG_WORK_AT_HOME | The work at home code for an assignment |
| ASSIGNMENT_ACTION_END_DATE | The end date of the assignment action |
| ASSIGNMENT_ACTION_START_DATE | The start date of the assignment action |
| CHEQUE_UK_NUMBER | The cheque number for the assignment action (UK spelling) |

| Database item | Description |
|----------------------|--|
| CHECK_US_NUMBER | The check number for the assignment action (US spelling) |
| GROSSUP_AMOUNT | The gross up amount to be added to the net amount |

Employee Hire Information

| Database item | Description |
|-------------------------|---|
| EMP_HIRE_DATE | The employee's hire date |
| EMP_LAST_PROCESS_DATE | The date the employee was last processed |
| EMP_LEAVING_REASON | The reason the employee left |
| EMP_LEAVING_REASON_CODE | The code for the reason the employee left |
| EMP_PROJ_TERM_DATE | The employee's projected termination date |
| EMP_TERM_ACCEPTED_BY | The person who accepted the employee's notice |
| EMP_TERM_DATE | The employee's termination date |

Home Address Details (UK only)

| Database item | Description |
|----------------------|------------------------------------|
| PER_ADR_UK_COUNTY | The person's home county (UK only) |

Home Address Details (US only)

| Database item | Description |
|-----------------------|-----------------------------------|
| PER_ADR_US_COUNTY | The person's county (US only) |
| PER_ADR_US_STATE | The person's state (US only) |
| PER_ADR_US_STATE_CODE | The person's state code (US only) |

Human Resources Intelligence

| Database item | Description |
|----------------------------------|---|
| HRI_ASG_EMPLOYMENT_CATEGORY_CODE | The employment category code |
| HRI_ASG_FREQ_CODE | The assignment working hours frequency code |
| HRI_ASG_FULL_TIME_FREQ | The full-time frequency |
| HRI_ASG_FULL_TIME_HOURS | The full-time working hours |
| HRI_ASG_HOURS | The normal working hours of the assignment |
| HRI_ASG_PER_EMP_PTU | Person Assignment EMP User Person Type |
| HRI_ASG_PER_APL_PTU | Person Assignment APL User Person Type |
| HRI_ASG_PER_CWK_PTU | Person Assignment CWK User Person Type |
| HRI_ASG_PRIMARY_CODE | The primary assignment code |

Location Details

| Database item | Description |
|----------------------|---|
| LOC_ADR_LINE_1 | The first line of the assignment's work address |
| LOC_ADR_LINE_2 | The second line of the assignment's work address |
| LOC_ADR_LINE_3 | The third line of the assignment's work address |
| LOC_ADR_POSTAL_CODE | The postal code for the assignment's work address |
| LOC_ADR_REGION_1 | The first line of the assignment's region |
| LOC_ADR_REGION_2 | The second line of the assignment's region |
| LOC_ADR_REGION_3 | The third line of the assignment's region |
| LOC_ADR_PHONE_1 | The assignment's first work telephone number |
| LOC_ADR_PHONE_2 | The assignment's second work telephone number |
| LOC_ADR_PHONE_3 | The assignment's third work telephone number |
| LOC_ADR_CITY | The town or city where the assignment works |
| LOC_ADR_COUNTRY | The country where the assignment works |

Payroll Details

| Database item | Description |
|---|--|
| ACTION_TYPE | Action type of target payroll action |
| LAST_REG_PAYMENT_PERIOD | The last regular payment period |
| LAST_REG_PAYMENT_PERIOD_START_DATE | The start date of the last regular payment period |
| PAY_EARNED_CUT_OFF_DATE | The cut-off date of the earned period |
| PAY_EARNED_DIRECT_DEPOSIT_DATE | The direct deposit date of the earned period |
| PAY_EARNED_END_DATE | The end date of the earned period |
| PAY_EARNED_PAY_ADVICE_DATE | The pay advice date of the earned period |
| PAY_EARNED_PERIOD_ID | The ID of the time period of the earned period |
| PAY_EARNED_PERIOD_NAME | The period name for the earned period |
| PAY_EARNED_PERIOD_NUMBER | The period number for the earned period |
| PAY_EARNED_START_DATE | The start date of the earned period |
| PAY_NO_OF_SCHEDULED_PAYMENTS | The start date of the earned period |
| PAY_PERIODS_PER_YEAR | The number of payable periods in the year (as of date earned) |
| PAY_PERIODS_PER_YEAR_DP | The number of payable periods in the year (as of date paid) |
| PAY_PROC_PERIOD_CUT_OFF_DATE | The cut off date for the payroll period (as of date earned) |
| PAY_PROC_PERIOD_CUT_OFF_DATE_DP | The cut off date for the payroll period (as of date paid) |
| PAY_PROC_PERIOD_DATE_PAID | The date the payroll was paid |
| PAY_PROC_PERIOD_DIRECT_DEPOSIT_DATE | The direct deposit date for the payroll period (as of date earned) |
| PAY_PROC_PERIOD_DIRECT_DEPOSIT_DATE_DP | The direct deposit date for the payroll period (as of date paid) |
| PAY_PROC_PERIOD_END_DATE | The end date of the payroll period (as of date earned) |
| PAY_PROC_PERIOD_END_DATE_DP | The end date of the payroll period (as of date paid) |
| PAY_PROC_PERIOD_ID | The ID of the time period for the payroll (as of date earned) |

| Database item | Description |
|---|--|
| PAY_PROC_PERIOD_ID_DP | The id of the time period for the payroll (as of date paid) |
| PAY_PROC_PERIOD_NAME | The period name for the payroll (as of date earned) |
| PAY_PROC_PERIOD_NAME_DP | The period name for the payroll (as of date paid) |
| PAY_PROC_PERIOD_NUMBER | The current period number for the payroll (as of date earned) |
| PAY_PROC_PERIOD_NUMBER_DP | The current period number for the payroll (as of date paid) |
| PAY_PROC_PERIOD_PAY_ADVICE_DATE | The pay advice date for the payroll period (as of date earned) |
| PAY_PROC_PERIOD_PAY_ADVICE_DATE_DP | The pay advice date for the payroll period (as of date paid) |
| PAY_PROC_PERIOD_START_DATE | The start date of the payroll period (as of date earned) |
| PAY_PROC_PERIOD_START_DATE_DP | The start date of the payroll period (as of date paid) |
| PAYROLL_ARREARS_FLAG | Value of arrears flag for payrolls |

People Addresses

| Database item | Description |
|----------------------|---|
| PER_ADR_CITY | The name of the person's town or city |
| PER_ADR_COUNTRY | The name of the person's country |
| PER_ADR_COUNTRY_CODE | The person's country code |
| PER_ADR_DATE_FROM | The first date on which the person can be contacted at this address |
| PER_ADR_DATE_TO | The last date on which the person can be contacted at this address |
| PER_ADR_LINE_1 | The first line of the person's address |
| PER_ADR_LINE_2 | The second line of the person's address |
| PER_ADR_LINE_3 | The third line of the person's address |
| PER_ADR_PHONE_1 | The person's first contact number |
| PER_ADR_PHONE_2 | The person's second contact number |
| PER_ADR_PHONE_3 | The person's third contact number |
| PER_ADR_POSTAL_CODE | The person's postal code |
| PER_ADR_REGION_1 | The first line of the person's region |
| PER_ADR_REGION_2 | The second line of the person's region |
| PER_ADR_REGION_3 | The third line of the person's region |

People Information

| Database item | Description |
|---------------------------|--|
| PER_1099R_NAME | Employee details for 1099R |
| PER_AGE | The person's age |
| PER_APPLICANT_NUMBER | The person's applicant number |
| PER_BENEFIT_GROUP_ID | The ID of the person's benefit group |
| PER_COORD_BEN_MED_PLN_NO | The benefits medical plan number for the person |
| PER_COORD_BEN_NO_CVG_FLAG | Whether there is any other benefits coverage |
| PER_CURRENT_APP | Whether the person is a current applicant (yes/no) |

| Database item | Description |
|--------------------------------|--|
| PER_CURRENT_CWK | Whether the person is a current contingent worker (yes/no) |
| PER_CURRENT_EMP | Whether the person is a current employee (yes/no) |
| PER_CWK_NUMBER | The person's contingent worker number |
| PER_DATE_OF_BIRTH | The person's date of birth |
| PER_DATE_OF_DEATH | The person's date of death |
| PER_DATE_VERIFIED | The date the employee last verified his or her personal data |
| PER_DISABLED | Whether the person is disabled (yes/no) |
| PER_DPNT_ADOPTION_DATE | The person's dependent's adoption date |
| PER_DPNT_VLNTRY_SVCE_FLAG | Whether the dependent is on voluntary service |
| PER_EMP_NUMBER | The person's employee number |
| PER_FIRST_NAME | The person's first name |
| PER_FULL_NAME | The person's full name |
| PER_KNOWN_AS | The person's preferred name |
| PER_LAST_NAME | The person's last name |
| PER_MAIL_DESTINATION | The person's mail destination |
| PER_MARITAL_STATUS | The person's marital status |
| PER_MIDDLE_NAMES | The person's middle names |
| PER_NATIONALITY | The person's nationality |
| PER_NATIONAL_IDENTIFIER | The person's national identifier |
| PER_ORIGINAL_DATE_OF_HIRE | Date the person was first hired |
| PER_PERSON_TYPE | Type of person (employee or applicant, for example) |
| PER_PREFIX | The person's name prefix |
| PER_PREV_LAST_NAME | The person's previous last name |
| PER_RECEIPT_OF_DEATH_CERT_DATE | Date of receipt of the person's death certificate |
| PER_SEND_EXPENSES | Where to send the person's expenses (home/office) |

| Database item | Description |
|-----------------------|------------------------------------|
| PER_SEX | The person's sex |
| PER_SUFFIX | The person's name suffix |
| PER_TITLE | The person's title |
| PER_USES_TOBACCO_FLAG | Whether the person uses tobacco |
| PER_WORK_PHONE | The person's work telephone number |

Person Types

| Database item | Description |
|----------------------|--|
| PTU_CON_PERSON_TYPE | The contact's person type, for example employee, applicant |
| PTU_PER_PERSON_TYPE | The type of person, for example employee, applicant |
| PTU_REC_PERSON_TYPE | The recruiter's person type, for example employee |
| PTU_SUP_PERSON_TYPE | The supervisor's person type, for example employee |

Recruiter Information

| Database item | Description |
|----------------------|--|
| REC_CURRENT_APP | Whether the recruiter is a current applicant (yes/no) |
| REC_CURRENT_CWK | Whether the recruiter is a current contingent worker (yes/no) |
| REC_CWK_NUMBER | The recruiter's contingent worker number |
| REC_CURRENT_EMP | Whether the recruiter is a current employee (yes/no) |
| REC_EMP_NUMBER | The recruiter's employee number |
| REC_GRADE | The recruiter's grade |
| REC_INT_ADDR_LINE | The recruiter's internal address |
| REC_JOB | The recruiter's job |
| REC_LOCATION | The recruiter's work location |
| REC_MANAGER | Whether the assignment is a managerial assignment (yes/no) |
| REC_ORG | The name of the recruiter's organization |
| REC_PERSON_TYPE | The recruiter's person type (employee or applicant, for example) |
| REC_POSITION | The recruiter's position |
| REC_WORK_PHONE | The recruiter's work telephone number |

Supervisor Information

| Database item | Description |
|----------------------|--|
| SUP_CURRENT_CWK | Whether the supervisor is a current contingent worker (yes/no) |
| SUP_CURRENT_EMP | Whether the supervisor is a current employee (yes/no) |
| SUP_CWK_NUMBER | The contingent worker number of the supervisor |
| SUP_DATE_FROM | The date from which this supervisor information is effective |
| SUP_DATE_TO | The date to which this supervisor information is effective |
| SUP_EMAIL_ADDRESS | The supervisor's email address |
| SUP_EMP_NUMBER | The supervisor's employee number |
| SUP_GRADE | The supervisor's grade |
| SUP_INT_ADDR_LINE | The supervisor's internal address |
| SUP_JOB | The supervisor's job |
| SUP_LOCATION | The supervisor's work location |
| SUP_MANAGER | Whether the assignment is a managerial assignment (yes/no) |
| SUP_ORG | The supervisor's organization |
| SUP_PERSON_TYPE | The supervisor's person type |
| SUP_POSITION | The supervisor's position |
| SUP_WORK_PHONE | The supervisor's work telephone number |

Work Address Details (UK only)

| Database item | Description |
|----------------------|--|
| LOC_ADR_UK_COUNTY | The assignment's work county (UK only) |

Work Address Details (US only)

| Database item | Description |
|-----------------------|--|
| LOC_ADR_US_COUNTY | The assignment's work county (US only) |
| LOC_ADR_US_STATE | The assignment's work state (US only) |
| LOC_ADR_US_STATE_CODE | The assignment's work state code (US only) |

Static Database Items for Oracle US Federal HR

Static database items are shipped with the system and you cannot modify them. For a list of the standard static database items, refer to *Static Database Items*, page 1-54.

You can use the following Oracle Federal HR data items with Fast Formula Rules.

- Location Extra Information: Duty Station ID
- Assignment Extra Information: Step or Rate, Tenure, Annuitant Indicator, Pay Rate Determinant, Work Schedule, Part-Time Hours Biweekly, Duty Status
- Person Extra Information: Citizenship, Veterans Preference, Veterans Preference for RIF, Veterans Status, Appointment Type, Type of Employment, Race or National Origin, Date Last Promotion, SCD Leave, SCD Civilian, SCD RIF, SCD TSP, Date From Retained Grade, Date To Retained Grade, Retained Grade, Retained Step or Rate, Retained Pay Plan, Retained Pay Table ID, Retained Pay Basis, FERS Coverage, Previous Retirement Coverage, Frozen Service, NAF Retirement Indicator
- Position Extra Information: Valid Grade, Target Grade, Pay Table ID, Pay Basis, Employment Category Group, Occupation Category Code, FLSA Category, Bargaining Unit Status, Supervisory Status, Position Occupied, Intelligence Position Ind, LEO Position Indicator, Position Type

If you define agency-specific Extra Information types or segments, you can create database items for them.

See: *Setting Up Extra Information Types (Excluding Organization EITs)*, *Oracle US Federal HR Configuring, Reporting, and System Administration Guide*

Dynamic Database Items

Dynamic database items are created by Oracle HRMS processes whenever you define new elements or other related entities.

Element Database Items

When you define a new element, Oracle HRMS runs a process to create a number of related database items for it. To ensure easy recognition of these items, the process adds the element name <ENAME> to each one. It also creates further database items for each pay and input value you use <INAME>.

Here is a list of database items created each time you define an element using the Element window:

| Database item | Description |
|--------------------------------------|--|
| <ENAME>_BEN_CLASS | The element's benefit classification |
| <ENAME>_CLASSIFICATION | The element's classification |
| <ENAME>_CLOSED_FOR_ENTRY | Yes/no flag: translated into local language. If Yes, new element entries cannot be created but existing element entries can still be modified. |
| <ENAME>_CLOSED_FOR_ENTRY_CODE | Yes/no flag: If Yes, new element entries cannot be created but existing element entries can still be modified. |
| <ENAME>_COSTABLE_TYPE | The element's costable type (from lookup table) |
| <ENAME>_COSTABLE_TYPE_CODE | The element's costable type (code values) |
| <ENAME>_COUNT | The element entry count |
| <ENAME>_END_DATE | The date to which this element is effective |
| <ENAME>_INPUT_CURRENCY_CODE | The element's input currency code |
| <ENAME>_LENGTH_OF_SERVICE | The element's qualifying length of service |
| <ENAME>_OUTPUT_CURRENCY_CODE | The element's output currency code |
| <ENAME>_PROCESSING_PRIORITY | The element's processing priority |
| <ENAME>_QUALIFYING_AGE | The element's qualifying age |
| <ENAME>_QUALIFYING_UNITS_CODE | The qualifying length of service units (code values) |
| <ENAME>_QUALIFYING_UNITS | The qualifying length of service units (from lookup table) |
| <ENAME>_REPORTING_NAME | The element's reporting name |
| <ENAME>_STANDARD_LINK | Yes/no flag: yes = standard, no = discretionary |
| <ENAME>_STANDARD_LINK_CODE | Yes/no flag: yes = standard, no = discretionary |
| <ENAME>_<INAME>_UNIT_OF_MEASURE | The element's unit of measure (from lookup table) |
| <ENAME>_<INAME>_UNIT_OF_MEASURE_CODE | The element's unit of measure (code values) |
| <ENAME>_<INAME>_DEFAULT | The element's default input value |
| <ENAME>_<INAME>_MIN | The element's minimum input value |
| <ENAME>_<INAME>_MAX | The element's maximum input value |

In addition to the items above, Oracle HRMS creates the following four items for elements defined with multiple entries *not* allowed:

| Database item | Description |
|-----------------------------------|--|
| <ENAME>_<INAME>_ENTRY_VALUE | The element value |
| <ENAME>_<INAME>_USER_ENTERED_CODE | Whether a value exists at the element entry level (yes/no) |
| <ENAME>_<INAME>_START_DATE | The element's start date |
| <ENAME>_<INAME>_END_DATE | The element's end date |

In addition to the common list above, Oracle HRMS creates the following item for elements defined with multiple entries allowed whose input values are numeric (that is, hours, integer, money or number).

| Database item | Description |
|-----------------------------|--|
| <ENAME>_<INAME>_ENTRY_VALUE | The summed element values for the multiple entries |

The units for '<ENAME> <INAME> ENTRY VALUE' are generated for both recurring and nonrecurring elements and are user-definable. Oracle HRMS modifies the definition text to retrieve the entry value in the unit of measure as specified in the PAY_INPUT_VALUES_F table.

Grade Rate Database Items

When you define a grade rate, Oracle HRMS runs a process to create a number of related database items for it. To ensure easy recognition of these items, the process adds the grade rate name <NAME> to each one.

Here is a list of database items created each time you define a grade rate using the Grade Rate window:

| Database item | Description |
|----------------------|--------------------------------|
| GRADE_<NAME>_VALUE | The grade rate's value |
| GRADE_<NAME>_MINIMUM | The grade rate's minimum value |
| GRADE_<NAME>_MAXIMUM | The grade rate's maximum value |

Pay Scale Rate Database Items

When you define a pay scale rate, Oracle HRMS runs a process to create the following database item for it. To ensure easy recognition of this item, the process adds the rate name <NAME> to it.

| Database item | Description |
|--------------------|---------------------------|
| SPINE_<NAME>_VALUE | The pay scale rates value |

Descriptive Flexfield Database Items

When you define descriptive flexfield segments you make them available for use in QuickPaint by running the Create Descriptive Flexfield DB Items process from the Submit Requests window. This process creates database items for each of the descriptive flexfields listed below.

To ensure easy recognition of these items, the process adds the descriptive flexfield segment name <SEGMENT_NAME> to each one.

| Database item | Description |
|---------------------------------------|---|
| PEOPLE_<SEGMENT_NAME> | People descriptive flexfield database items |
| PAYROLLS_<SEGMENT_NAME> | Payroll descriptive flexfield database items |
| ASSIGNMENTS_<SEGMENT_NAME> | Assignment descriptive flexfield database items |
| GRADES_<SEGMENT_NAME> | Grade descriptive flexfield database items |
| ABSENCES_<SEGMENT_NAME> | Absence descriptive flexfield database items |
| ABSENCE_TYPES_<SEGMENT_NAME> | Absence Type descriptive flexfield database items |
| PERSON_ADDRESSES_<SEGMENT_NAME> | Person Address descriptive flexfield database items |
| EVENTS_<SEGMENT_NAME> | Events descriptive flexfield database items |
| JOBS_<SEGMENT_NAME> | Jobs descriptive flexfield database items |
| CONTACTS_<SEGMENT_NAME> | Contacts descriptive flexfield database items |
| PERIODS_OF_SERVICE_<SEGMENT_NAME> | Periods of Service descriptive flexfield database items |
| RECRUITMENT_ACTIVITIES_<SEGMENT_NAME> | Recruitment Activities descriptive flexfield database items |
| POSITION_<SEGMENT_NAME> | Position descriptive flexfield database items |
| APPLICATIONS_<SEGMENT_NAME> | Applications descriptive flexfield database items |
| ORGANIZATION_<SEGMENT_NAME> | Organization descriptive flexfield database items |

Key Flexfield Database Items

When you define key flexfield segments you make them available for use in QuickPaint by running the Create Key Flexfield DB Items process from the Submit Requests window. This process creates database items for each of the key flexfields listed below.

To ensure easy recognition of these items, the process adds the key flexfield segment name <SEGMENT_NAME> to each one.

Run this process for each of your Business Groups. If you define context-dependent key flexfield structures using BUSINESS_GROUP_ID as the reference field, the process creates database items for those flexfield segments as well. BUSINESS_GROUP_ID is the only reference field that the Create Key Flexfield DB Items process supports.

| Database item | Description |
|------------------------------------|--|
| COMP_KF_<SEGMENT_NAME> | Competence key flexfield database items |
| GRADE_KF_<SEGMENT_NAME> | Grade key flexfield database items |
| GROUP_KF_<SEGMENT_NAME> | Group key flexfield database items |
| JOB_KF_<SEGMENT_NAME> | Job key flexfield database items |
| POS_KF_<SEGMENT_NAME> | Position key flexfield database items |
| SCL_ASG_<LEGISLATION_CODE>_<ENAME> | Assignment soft coded legislative flexfield database items |
| SCL_ORG_<LEGISLATION_CODE>_<ENAME> | Organization soft coded legislative flexfield database items |
| SCL_PAY_<LEGISLATION_CODE>_<ENAME> | Payroll soft coded legislative flexfield database items |

Absence Database Items

When you define an absence type, Oracle HRMS runs a process to create the following database item for it. To ensure easy recognition of this item, the process adds the absence type name <ABSENCE_NAME> to it.

| Database item | Description |
|----------------------------|--|
| <ABSENCE_NAME>_CUM_BALANCE | The cumulative balance for an absence type |

Formulas for Payroll Legislative Checks

Oracle FastFormula contains a formula type called Legislative Check that may have been set up by your localization team. This formula type can be set up to perform certain checks during a payroll run. For example, you can catch errors such as negative gross pay and cause the payroll run to fail appropriately.

Sometimes you may not want to run the legislation check in the payroll run so it is possible that this functionality can be enabled or disabled using the HR:Execute Legislative Check Formula within Run user profile.

Formulas for Benefits Administration

Oracle FastFormula contains many formula types that you can use for benefits administration. For example, grandfathered clauses and other special case scenarios may require you to write a FastFormula rule that defines special treatment for a subset of your benefits participants.

You can use Oracle FastFormula to calculate:

- The number of Hours Worked by a person in a given period
- A person's length of service
- The maximum coverage amount for a life insurance plan
- Participation Eligibility
- Other benefits related functions.

After you write a formula for use with Standard or Advanced Benefits, you link that formula to your plan design by selecting the formula in the Rule field of the appropriate window.

Total Compensation Formula Types

The following table lists the formula types you can use in administering benefits with Oracle HRMS.

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--------------------------|--|--|--|--------------|--|
| Hours Worked Calculation | Used to determine an Hours Worked amount to be used for Eligibility, Coverage or Benefit, Premium, and Rate calculations | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | Hrs_Wkd_Fctr_Id; Value of the Hrs_Wkd_Fctr.Val, Min Val, Max Val | Amount | Determine total number of hours worked during the person's most recent pay period. |
| Age Calculation | Used to determine an Age value to be used for Eligibility, Coverage or Benefit, Premium, and Rate calculations | " | Value of the Age_Fctr.Val, Min Val, Max Val | Amount | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-------------------------------|--|-----------------|--|---------------------|--|
| Length of Service Calculation | Used to determine a Service value to be used for Eligibility, Coverage or Benefit, Premium, and Rate calculations | " | LOS_Fctr_Id; Value of the LOS_Fctr.Val, Min Val, Max Val | Amount | |
| Compensation Calculation | Used to determine a Total Compensation amount to be used for Eligibility, Coverage or Benefit, Premium and Rate calculations | " | Comp_Lvl_Fctr_Id; Value of the Comp_Lvl_Fctr.Val, Min Val, Max Val | Amount | Sum the amounts for person's current Regular Salary defined balance as of the beginning of the year, Prior Year Total Commission benefits balance type, and Prior Year Total Bonus benefits balance type, and return the total amount. |
| Rate Value Calculation | Calculates a rate amount for a person. May be used to calculate a base or variable rate. | " | Acty_Base_Rt_Id or Vrbl_Rt_Id; Value of the Acty_Base_Rt.Val, Min Val, Max Val; Value of the Vrbl_Rt_Prfl.Val, Min Val, Max Val, | Amount | If a person is currently enrolled in this plan, or has been enrolled in this plan within the past 2 years, then the rate is equal to the rate person is currently paying. Otherwise, rate is equal to X. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-------------------------------------|--|----------|--|--------------|--|
| Premium Value Calculation | Calculates a premium amount for a person. | " | Acty_Base_Rt_Id or Vrbl_Rt_Id or Actl_Prem_Id or Cvg_Amt_Calc_Mthd_Id; Value of the Acty_Base_Rt.Val, Min Val, Max Val | Amount | Premium amount is equal to .05 times Coverage amount less 50,000 |
| Matching Amount Calculation | Calculates the matching amount. | " | " | Amount | People that work at Division A get matching amount of 5%. All others get 4% matching amount. |
| Minimum Coverage Amount Calculation | Calculates a minimum coverage or benefit amount for a person. | " | " | Amount | If in Benefits Group A, minimum amount is \$100. If in Benefits Group B, minimum amount is \$200. |
| Maximum Coverage Amount Calculation | Calculates a maximum coverage or benefit amount for a person. | " | " | Amount | Coverage maximum amount is equal to coverage amount for current enrollment; if no current enrollment, then maximum is \$100,000. |
| Period to Date Amount Calculation | Determines the maximum period to date amount a person may have for a particular activity rate. | " | | Amount | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|---------------------------------|---|-----------------|---------------------|---------------------|---|
| Coverage Amount Calculation | Calculates a coverage or benefit amount for a person. | " | | Amount | |
| Age Determination Date | Determines the date from which age will be calculated (e.g., the first day of the next plan year). | " | | Date | If person is in an Annual Enrollment event then return 10/1/99. If person is becoming eligible as a result of a new hire, rehire, return from leave or a change from part-time to full-time then return the event occurred on date. |
| Hours Worked Determination Date | Determines the date from which hours worked will be calculated (e.g., the first day of the next plan year). | " | | Date | If person is in an Annual Enrollment event then return 10/1/99. If person is becoming eligible as a result of a new hire, rehire, return from leave or a change from part-time to full-time then return the event occurred on date. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--------------------------------------|---|-----------------|---------------------|---------------------|---|
| Length of Service Date to Use | Determines the low date from which LOS will be calculated (e. g., original hire date or rehire date). | " | | Date | Return Start Date from the person's Absence Attendance row in order to determine the elapsed time that a person has been on a Leave of Absence. |
| Length of Service Determination Date | Determines the high date for which LOS will be calculated (e. g., the first day of the following month). | " | | Date | Return Start Date from the person's Absence Attendance row. |
| Compensation Determination Date | Determines the high date from which hours compensation will be calculated (e. g., the first day of the next plan year). | " | | Date | |
| Action Type Due Date | Determines the date on which the Action Type must be completed (e. g. 90 days from the Life Event Creation Date). | " | | Date | If person is currently enrolled, 60 days from life event creation date. If person is not currently enrolled, 30 days from life event creation date. |
| Participation Eligibility Start Date | Determines when eligibility for a person should start. | " | | Date | Add 6 months to the event date and return. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|------------------------------------|---|-----------------|---------------------|---------------------|--|
| Participation Eligibility End Date | Determines when eligibility for a person should end. | " | | Date | If Organization on current assignment = A, return date equal to Event Date; otherwise, return date equal to Start of Following Month after event date. |
| Enrollment Coverage Start Date | Determines when enrollment coverage for a participant should start. | " | | Date | Coverage start date based on how long you have been absent from a plan. |
| Enrollment End | Determines when enrollment coverage for a participant should end. | " | | Date | If Calculated LOS is less than 5 years, then end of current month. If Calculated LOS is greater than or equal to 5 years, then end of 6 months after event date. |
| Dependent Coverage Start Date | Determines when coverage for a dependent should start. | " | | Date | If notified of birth within 31 days of event, Coverage Start Date is Date of Birth. Otherwise, coverage start date is date of notification. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-----------------------------|---|--|---------------------|---------------------|---|
| Dependent Coverage End Date | Determines when coverage for a dependent should end. | " | | Date | If Contact Relationship Type = Spouse, coverage ends on date of event; if Contact Relationship Type = Child, coverage ends on end of the month following event. |
| Rate Start Date | Determines when a rate for an enrollment result for a participant should start. | " | | Date | Rate starts on the date after the rate end date of the current enrollment. |
| Rate End Date | Determines when a rate for an enrollment result for a participant should end. | " | | Date | Rate ends on the day before the person's next pay period. |
| Participation Eligibility | Determines whether a person is eligible for the associated compensation object. (This is the rule used in the eligibility profile rule entities.) | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Balance_Date | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|------------------------|--|---|--------------|---|--|
| Dependent Eligibility | Determines whether a person is eligible to be covered by a participant in a compensation object. | " | | Y/N | Dependent is eligible if Employee Work Location is 001 and Dependent is under age 21 or if Employee Work Location is not 001 and Dependent is under age 25. |
| Enrollment Opportunity | Determines whether the compensation object should be an electable choice for the person. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | One of the BEN_ENRT_MTHD values: A or E; or N | As a result of a transfer event, the participant can only enroll in an HMO if they were previously enrolled in an HMO and that HMO is no longer available to them in their new location. |
| To Be Sent Date | Determines the date on which the communication should be sent to the person. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Cm_Typ_Id | | Date | If participant's organization is equal to {org1} or {org2} then return start of enrollment period - 14 days. If participant's organization is not equal to {org1} or {org2} then return start of enrollment period - 7 days. |
| Rounding | Rounds a number to the specified place or decimal. | None | | Amount | Amount to be rounded - \$250 rounded to the next \$500 |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-----------------------------|---|--|--------------|---|---|
| Percent Rounding | Rounds a percent to the specified place or decimal. | | | Amount | |
| Automatic Enrollment Method | Determines the conditions under which a person should be automatically enrolled in a compensation object. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | One of the BEN_ENRT_MTHD values: A or E; or N | Reinstate active benefits if rehired in the same plan year. |
| Deduction Schedule | Determines the deduction schedule to be used for this person. | " | | One of the BEN_DED_SCHED values | If bargaining unit code is not null return "Second Period In Month" else return "Every Pay Period". |
| Payment Schedule | Determines the payment schedule to be used for this person. | " | | One of the BEN_PYMT_SCHED values | If bargaining unit code is not null return "Second Period In Month" else return "Every Pay Period". |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|------------------------------------|--|-----------------|---------------------|---|---|
| Default to Assign Pending Action | Determines the applicable default option or benefit to assign to the person when his or her choice has been suspended. | " | | One of the BEN_DFLT_TO_ASN_PNDG_CTFN values | Reinstate the active benefits that a person had at the time that the person was previously active. (NOTE: cannot reinstate most recent benefits, as person could have some other elections, such as COBRA). |
| Enrollment Certification Required | Determines the conditions under which a person must provide certification in order to enroll or elect a particular plan or option in plan, or benefit. | " | | Y/N | Participant does not need to provide certification if they were enrolled in the compensation object and had provided certification within the past 12 months. |
| Dependent Certification Required | Determines the conditions under which a person must provide certification for his or her designated dependents. | " | | Y/N | |
| Beneficiary Certification Required | Determines the conditions under which a person must provide certification for his or her designated beneficiaries. | " | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|------------------------------|---|---|--------------|--------------|---|
| Waive Certification Required | Determines the conditions under which a person must provide certification when he or she waives participation. | " | | Y/N | |
| Inspection Required | Determines whether inspection of the communication is required. If so, the "Inspection Flag" is set to 'yes' for this person's communication. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Cm_Typ_Id | | Y/N | If participant's division = "Corporate" or if participant's HCE indicator = "Y" return "YES". |
| Communication Appropriate | Determines for this communication and trigger, whether the communication should be sent; restricts to whom to send. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Ler_Id, Cm_Typ_Id | | Y/N | If person is in an Annual Enrollment event and today's date is within seven days of the enrollment period end date return "No". |
| Communication Type | Determines whether the communication should be sent. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Ler_Id, Cm_Typ_Id | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--------------------------------|---|--|--------------|---|--|
| Mandatory Determination | Determines whether this option in plan should be assigned to a person (and not be optional) as part of the enrollment process. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Y/N | |
| Postelection Edit | Performs edits on an enrollment result, e. g. is the spouse of the participant also enrolled; does the spouse of the participant work at the same company. | " | | Y/N and Text | If the participant elects a non-waive plan under the spouse life plan type, the participant must elect an equal or greater amount of participant life insurance. |
| Partial Month Proration Method | Determines which value to use: Date Earned, Pay Period End Date, or Payment Date. This tells the proration process which date to use when determining how many pay periods remain, and when the element entry should start. | " | | One of the Values of : BEN_PRTL_MO_DET_MTHD | If the participant is paid monthly and enrolls in a medical plan between the 8th and 15th of the month, then return 75% of the normal monthly price tag. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--|---|----------|--------------|---|-------------|
| Partial Year Coverage Restriction | Determines the maximum coverage amount for partial years of coverage. Allows determination of values other than delivered values of: 1) Standard maximum as defined in the plan. 2) Prorate maximum based on the number of months remaining in the plan year. | " | | Amount | |
| Partial Month Effective Date Determination | Determines which value to use: Date Earned, Pay Period End Date, or Payment Date. This tells the proration process which date to use when determining how many pay periods remain, and when the element entry should start. | " | | One of the Values of : BEN_PRTL_ MO_EFF_ DT_DET | |
| Lack Certification Allow Reimbursement | Identifies cases where certification is waived. | " | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-------------------------------|--|-----------------|---------------------|---------------------|--|
| Compensation Object Selection | Determines which compensation objects are to be included for processing in a concurrent manager process. | " | | Y/N | Run the default process for the flex and nonflex programs only. Participation process selection mode: determine eligibility for all compensation objects that use derivable factors. |
| Person Selection | Determines which people are to be included for processing in a concurrent manager process. | " | | Y/N | Select all ex-participants who were working at a specific organization. |
| Verify Family Member | Determines whether the person has one or more contacts of a specific type or types, e. g. spouse, spouse and one child, more than one child. | " | | Y/N | |
| Five Percent Owner | Determines for this plan and regulation whether the person is a five percent owner as defined in the regulation. | " | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--------------------------------|---|-----------------|---------------------|---------------------|--------------------|
| Highly Compensated | Determines for this plan and regulation whether the person is considered to be "highly compensated" as defined in the regulation. | " | | Y/N | |
| Key Employee | Determines for this plan and regulation whether the person is considered to be a "key employee" as defined in the regulation. | " | | Y/N | |
| Break in Service Value | Break in Service Value | " | | Amount | |
| Break in Service Determination | Determines whether a break in service has occurred and if this break should not be ignored. | " | | Y/N | |
| Contribution Nondiscrimination | Compares individual employee pretax contribution amounts to total pretax contributions for highly and non-highly compensated persons. | " | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-----------------------------|--|---|--------------|--------------|-------------|
| Coverage Nondiscriminatory | Compares the total number of persons eligible to participate in a plan minus the persons who are not eligible due to legislated allowable factors to the number actually participating. | " | | Y/N | |
| Extract Person Data Element | Specifies person or assignment information to be included as a data element item. This rule type can also return the results of a calculation performed on person or assignment information. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id | | Text | |
| Extract Person Inclusion | Specifies person or assignment level inclusion or exclusion for system extract. | " | | Y/N | |
| Communication Usage | Determines whether a Communication Usage requirement has been satisfied. If so, then a communication should be triggered for this usage. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Ler_Id, Cm_Typ_Id | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--|--|--|--------------|--------------|--|
| Default Enrollment | Determines whether this option in plan should be assigned to a person as part of the default enrollment process. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | | |
| Enrollment Period Start Date | Determines the date on which the enrollment period starts. | | | Date | |
| Enrollment Period End Date | Determines the date on which the enrollment period ends. | " | | Date | |
| Pop-Up Message | Determines whether a pop-up message displays and it what form. | " | | Y/N | For a participant who selects life insurance at 10x salary, display a warning message on the enrollment form if the participant's salary is less than 50k. |
| Collapse Life Event Resulting Occurred On Date | When life events are collapsed this rule determines the date to use for the resulting life event. | " | | Date | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--------------------------------|--|--|--------------|---|-------------|
| Collapse Life Event Evaluation | Determines whether the life event should be collapsed and deleted, collapsed and voided, or neither. | " | | One of the values of: BEN_EVAL_DT: Collapse or Void; or leave as is | |
| Vested Value | Determine the vested percent for a person. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Balance_Date | | Percent | |
| Change Dependent Coverage | Used to determine if a dependent can be 'Added Only', 'Removed Only', 'Added and Removed', or 'Neither'. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Y/N | |
| Evaluate Life Event | Determines if this life event is valid, or if the life event information needs to be changed, e. g. status, voided date, unprocessed date. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Ler Id | | Y/N, status code, unprocessed date, processed date. | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|--|---|-----------------|---------------------|---------------------|--------------------|
| Maximum Waiting Period Date to Use | Determines the low date from which the maximum waiting period will be calculated (e.g., original hire date or rehire date). | " | | Date | |
| Waiting Period Value and UOM | Determines the waiting period and unit of measure to be applied to a person. | " | | Amount and UOM | |
| Maximum Period of Enrollment Value and UOM | Determines the maximum enrollment period and unit of measure for a compensation object. | " | | Amount and UOM | |
| Person Change Causes Life Event | Determines whether this life event is valid for a person based on the data that changed. | " | | Y/N | |
| Related Person Change Causes Life Event | Determines whether this life event is valid for a related person based on the data that changed. | " | | Y/N | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|----------------------------------|--|--|---------------------|---------------------|--------------------|
| Participant Eligible to Rollover | Determines whether this person may roll over flex credits into a particular compensation object. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Balance_Date | | Y/N | |
| Payment Must Be Received | Determines whether a payment is missing or late. | " | | Y/N | |
| Life Event Reason Timeliness | Determines whether a life event has been reported in a timely manner. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Y/N | |
| Required Period of Enrollment | Determines the earliest deenrollment date for a person's electable choice for a compensation object. | " | | Date | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|----------------------|--|--|---------------------|---------------------|--------------------|
| Rate Lower Limit | Calculates an amount used to determine the lower limit value to which an activity rate or variable rate value is compared. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id, Balance_Date | | Amount | |
| Rate Upper Limit | Calculates an amount used to determine the upper limit value to which an activity rate or variable rate value is compared. | " | | Amount | |
| Coverage Lower Limit | Calculates an amount used to determine the lower limit for an activity or variable coverage or benefit. | " | | Amount | |
| Coverage Upper Limit | Calculates an amount used to determine the upper limit for an activity or variable coverage or benefit. | " | | Amount | |
| Premium Lower Limit | Calculates an amount used to determine the lower limit for an activity or variable premium. | " | | Amount | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|---|--|--|---|---------------------|------------------------------|
| Premium Upper Limit | Calculates an amount used to determine the upper limit for an activity or variable premium. | " | | Amount | |
| Maximum Period of Enrollment | Period of Enrollment Rule determines whether a person has been enrolled for the maximum length of time allowed for a plan or option in a plan. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Y/N | |
| Maximum Period of Enrollment Determination Date | Determines the low date to be used when determining whether the person has been enrolled in a plan or option in plan for the maximum period of time. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Date | |
| Partial Month Proration Value Calculation | Calculates a value for a partial month enrollment. | " | | Percent | |
| Variable Rate Add On Calculation | Calculates a new value when a variable rate result is used. | " | Result of the Variable Rate Calculation | Amount | Multiply the result by 102%. |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|---------------------------------|---|--|--------------|---|-------------|
| Segment Costing Method | Determines how an amount is to be costed based on the segment in the COST KEY ALLOCATION KEY FLEXFIELD. | " | | Key Cost Allocation Flexfield Segment | |
| Extract Enrollment Data Element | Specifies enrollment information to be included as a data element item. This formula type can also return the results of a calculation performed on enrollment information. | Business_Group_Id, Effective_Date, Assignment_Id, Pl_Id, Opt_Id, Ler_Id | | Text | |
| Maximum Credit Rollover Value | Determines the maximum amount a person may rollover to another plan or option in plan. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Amount | |
| Default Excess Credit Treatment | Determines how any excess credits are to be allocated. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | One of the values in BEN_DFLT_EXCS_TRTMT_CD | |

| Formula Type | Description | Contexts | Input Values | Return Value | Sample Rule |
|-------------------------------|--|--|--|---|--|
| Prorate Annual Election Value | Determines how a minimum or maximum annual election value is prorated. | Business_Group_Id, Effective_Date, Jurisdiction_Code, Organization_Id, Assignment_Id, Pgm_Id, Pl_Typ_Id, Pl_Id, Opt_Id, Ler_Id | | Amount | |
| Extract Post Process | This formula type provides additional system extract processing and is called after all extracted records are written. | Business_Group_Id, Effective_Date | EXT_RSLT_ID (this is found on ben_ext_rslt and ben_ext_rslt_dtl tables). | Nothing. All processing should be via formula function. Commit will occur in calling program. | Allows you to insert intermittent totals, delete records, change sorting, format fields, update values, etc. |

UK Only Functions

The following functions have been registered for use in the UK only formulas.

CALCULATE_TIME_WORKED

Calculates the time worked between a start date and end date for an assignment.

CLASS1A_YTD

Calculate car benefit, year to date

COUNT_ASSIGNMENTS

Count of assignments an employee has

DIRECTOR_WEEKS

Number of weeks an employee has been a director

GET_BACS_PROCESS_DATE

Return the BACS processing date

GET_FTE_VALUE

The GET_FTE_VALUE identifies the FTE value for a given assignment on a specified date in the past from the PER_ASSIGNMENT_BUDGET_VALUES table.

This function uses the following Input Parameters:

- P_ASSIGNMENT_ID (number) - this is a required input and identifies which assignment to retrieve FTE for.
- P_QUERY_DATE (date) - this is a required input and specifies the date at which to retrieve FTE.

NI_ABLE_DIR_YTD

NIable pay for a director, year to date

NI_ABLE_PER_PTD

NIable pay for a person with multiple assignments

NI_CO_RATE_FROM_CI_RATE

Find the NI contracted out rate from the CI rate

PAYMENT_YTD

Calculate car payment, year to date

PERIOD_TYPE_CHECK

Test whether the period type is valid

PQP_GB_GET_ABSENCE_SSP_FOR_DATE_RANGE

Returns the amount of SSP payable for an absence within a date range.

PQP_GB_GET_ABSENCE_SMP_FOR_DATE_RANGE

Returns the amount of SMP payable for an absence within a date range.

PQP_GB_GAP_GET_FIRST_PAID_DAY

Returns the date on which a person starts to receive a given level of OSP payment.

PQP_GB_GAP_GET_LAST_PAID_DAY

Returns the date on which a person last received a given level of OSP payment.

PQP_GB_GAP_GET_FIRST_ENTITLED_DAY

Returns the date on which a person's entitlement for a given level of OSP payment starts.

PQP_GB_GAP_GET_LAST_ENTITLED_DAY

Returns the date on which a person's entitlement for a given level of OSP payment ceases.

SESSION_DATE

Return the session date

UK_TAX_YR_END

Find the end of the tax year

UK_TAX_YR_START

Find the start of the tax year

USER_RANGE_BY_LABEL

Lower bound of range from user table using row label

USER_VALUE_BY_LABEL

Value from user table using row label

VALIDATE_BACS_DATE

Return the previous BACS process date to a given date

VALIDATE_USER_VALUE

Verify that a given value is in a user table.

Japanese Legislative Functions

The following functions have been registered for use in Japanese legislative formulas:

CHECK_FORMAT

(expr, fmt)

The CHECK_FORMAT function returns TRUE or FALSE to verify that the text string operand expr matches the fmt type as follows:

| Format Type | Validation |
|--------------------|--|
| 0:0-9 | Numbers only, non-omissible |
| 9:0-9 | Numbers only, omissible |
| A:A-Z | Capital alphabet only, non-omissible |
| P:A-Z | Capital alphabet only, omissible |
| a:a-z | Small alphabet only, non-omissible |
| p:a-z | Small alphabet only, omissible |
| L:0-9, A-Z | Numbers and capital alphabet only, non-omissible |
| C:0-9, A-Z | Numbers and capital alphabet only, omissible |
| l:0-9, a-z | Numbers and small alphabet only, non-omissible |
| c:0-9, a-z | Numbers and small alphabet only, omissible |

Example:

```
CHECK_FORMAT ('123456ABC', '999999PPL') returns TRUE
```

CHECK_DATE_FORMAT

(date, date fmt)

The CHECK_DATE_FORMAT function returns TRUE or FALSE to verify that the date operand matches a given date fmt.

Example:

```
CHECK_DATE_FORMAT ('19990623', 'YYYYMMDD') returns TRUE
```

GET_LAST_ASSACT

(date1, date2)

The GET_LAST_ASSACT function returns latest assignment_action_id with 'SEQUENCED' classification_name between date1 and date2. Action_types with 'SEQUENCED' classification_name are as follows:

| ACTION_TYPE | MEANING | CLASSIFICATION_NAME |
|--------------------|------------------------|----------------------------|
| B | Balance Adjustment | SEQUENCED |
| F | Advance Pay | SEQUENCED |
| I | Balance Initialization | SEQUENCED |
| O | RetroPay | SEQUENCED |
| Q | QuickPay Run | SEQUENCED |
| R | Run | SEQUENCED |
| V | Reversal | SEQUENCED |
| Z | Purge | SEQUENCED |

ORG_EXISTS

(organization_id, org_class)

The ORG_EXISTS function returns TRUE or FALSE to verify that the organization ID is in the organization class..

Example:

```
ORG_EXISTS(12345, 'JP_KENPO')
```

South African Legislative Functions

Oracle HRMS for South Africa provides two prorating functions for use in formulas:

Prorate_Working_Days

- Proration is based on an average of 21.67 working days in a month. The number of days the employee has worked is derived from Assignment start to end date or the Payroll Period End Date. The number of working days in a month excludes Saturdays and Sundays but includes public holidays.

Prorate_Calendar_Days

- Proration is based on the number of calendar days in a month. The number of days the employee has worked is derived from Assignment start to end date or the Payroll Period End Date.

See: Functions, *Using Oracle FastFormula*

Hungarian Legislative Functions

Oracle HRMS for Hungary provides the following functions for use in formulas:

HU_ABS_GET_BLIND_DAYS

This formula function returns the number of days in the period for which the employee is blind.

HU_ABS_GET_CHILD_INFO

This formula function returns the child information such child or children aged under 16 in the start of the period, child or children turning 16 in the given period and date of birth of any children turning 16 in the given period.

HU_ABS_GET_JOB_DAYS

This formula function returns the number of days for the job with the Additional Holiday set to Yes for the calculation year.

HU_ABS_GET_PREV_EMP_SICKNESS_LEAVE

This formula function returns the amount of sickness leave taken in the previous employment for the calculation year.

HU_ABS_GET_WORKING_DAYS

This formula function returns the number of working days for the assignment for the given period depending on the work pattern attached to the assignment.

HU_ENTRY_IN_ACCRUAL_PLAN

This formula function returns the valid values for the holiday entitlements such as HU1 for Base Holiday, HU2 for Additional Holiday for bringing up children, HU3 for Other Additional Holiday, and HU4 for Sickness Holiday.

HU_PAYROLL_PERIODS

This formula function returns the number of payroll periods per year.

HU_PERSON_DOB

This formula function returns the date of birth of the employee.

Netherlands Payee Name Formulas

Oracle HRMS enables you to present the Payee Name of an employee/organization in a specified format, in the EFT Payment File. Creating a FastFormula entitled NL_PAYEE_REPORTING_NAME, you can decide the format the name appears on the file.

Prior to using the FastFormula, the Payee Name of the person/organization appearing on the EFT Payment is taken from the Payee Name field on the Personal Payment Method form. If this field is blank, a check is carried out to find the NL_PAYEE_REPORTING_NAME FastFormula, and use the information generated there. The Payee Name is set to Last Name ++ Initials of the person being paid, if no formula has been defined.

The Payee Address is taken from the City of the primary address of the relevant employee/organization identified in the Payee Name record. This is left blank if it does not exist. If the Payee Name is derived from the Payee Name field on the Personal Payment Method form, the address used depends on whether the Payee Name specified is a person or an organization. The Payee Address for an organization is taken from the City on the appropriate location address, otherwise, it is taken from the City on the employee's address.

However, if a FastFormula is selected, or the Payee Name consists of the Last Name "+" Initials, then the City from the employee address is used.

Netherlands EFT Payment Override Formula

Oracle HRMS enables you to override the contents of the Description field in the Transaction Description Record 160 of the EFT Payment file and enter your own information. You define a FastFormula with the standard name `NL_TRANSACTION_DESCRIPTION`, returning a value called `Transaction_Description`. The code in the formula can access any database item to derive the Transaction Description value. This description can be up to 128 characters in length, and spread over a maximum of 4 Transaction Description records.

Note: If you use the override, none of the derived values, such as Employee Name and Assignment Number, is included in the Transaction Description records unless added in the FastFormula.

Formulas for Netherlands Wage Tax Subsidies

Oracle HRMS provides you with FastFormulas for each of the following Wage Tax Subsidies:

- Wage Tax Eligibility - `NL_WAGE_TAX_SUBSIDY_ELIGIBILITY`. This formula derives the applicable wage tax subsidies for an employee assignment, and returns values for the relevant subsidies.
- Wage Tax Subsidy for Low Wages - `NL_CALC_LOW_WAGES_TAX_SUBSIDY`. This formula derives the wage tax subsidy for low wages for an employee.
- Wage Tax Subsidy for Paid Parental Leave - `NL_CALC_PAID_PARENTAL_LEAVE_TAX_SUBSIDY`. This formula derives a value for the wage tax subsidy for paid parental leave for an employee.
- Wage Tax Subsidy for Education - `NL_CALC_EDUCATION_TAX_SUBSIDY`. This formula derives a value for the wage tax subsidy for education for an employee.
- Wage Tax Subsidy for the Long Term Unemployed - `NL_CALC_LONG_TERM_UNEMPLOYED_TAX_SUBSIDY`. This formula derives a value for the wage tax subsidy for long term unemployed for an employee.

Netherlands Working Hours Formula

Oracle HRMS enables you to derive the weekly working hours to appear on the Central Bureau of Statistics (CBS) file. You define a FastFormula with the name `NL_WEEKLY_WORKING_HOURS`, to return a parameter called `Working_Hours` with a value for weekly working hours in the format 99.99. The formula code uses any database items or balances to obtain a value for the weekly working hours.

Note: If you do not define a FastFormula, the application draws the working hours from the Individual Working Hours held on the assignment.

Formulas to Enable Additional Part-Time Percentages for the Netherlands

Oracle HRMS enables you to create FastFormulas to calculate each of the additional part-time percentage values for an assignment, overriding the current general part-time percentage and assignment level information. The FastFormulas will have no input values, returning a parameter called Part_Time_Percentage, in the format 999.9999.

If you want all part-time percentage values to be set from information at the assignment level, you do not need to define any overriding FastFormulas.

If you want to override all the part-time percentage values using the same calculation, you define one formula called NL_PART_TIME_PERCENTAGE.

If you need to override any of the part-time percentage values, you must create the appropriate formula from the following:

- Standard SI part-time percentage- NL_STANDARD_SI_PART_TIME_PERCENTAGE
- Pseudo SI part-time percentage- NL_PSEUDO_SI_PART_TIME_PERCENTAGE
- Standard SI part-time percentage for reporting- NL_STANDARD_SI_REPORTING_PART_TIME_PERCENTAGE
- Pseudo SI part-time percentage for reporting- NL_PSEUDO_SI_REPORTING_PART_TIME_PERCENTAGE

Note: Pseudo SI Calculation uses the Pseudo SI Part-time Percentage. All the part-time percentages are limited according to the maximum limits set in the corresponding global values.

Examples

Sample Accrual Formula Example

This topic suggests how you can implement a whole range of accrual plan rules in your Accrual formula. The suggestions are based on a simple formula, which is similar to the seeded PTO_SIMPLE_MULTIPLIER formula. The sample formula is for a plan with the following rules:

- An accrual term of one calendar year starting 01 January.
- Monthly accrual periods and a fixed accrual of 2 days per month.
- An accrual ceiling of 20 days, fixed within the formula.
- Accrual for new hires begins on whichever of these dates is the latest: hire date, plan enrollment date, or continuous service date (which can be entered as an input value when you enroll an employee in a plan).

The top level formula repeatedly calls another formula in a loop to calculate the accrual for each period. Both the top level formula (PTO_ONE_YEAR_MULTIPLIER) and the looping formula (PTO_PERIOD_ACCRUAL) are given below.

Formula

```
1.  /*-----
NAME : PTO_ONE_YEAR_MULTIPLER

This formula calculates the dates between which
an assignment is to accrue time
-----*/

2.  DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS
      '31-DEC-4712' (date)

3.  DEFAULT FOR ACP_TERMINATION_DATE IS
      '31-DEC-4712' (date)

4.  DEFAULT FOR ACP_ENROLLMENT_START_DATE IS
      '31-DEC-4712' (date)

5.  DEFAULT FOR ACP_SERVICE_START_DATE IS
      '31-DEC-4712' (date)

6.  INPUTS ARE
      Calculation_Date (date)

7.  E = SET_NUMBER('CEILING', 20)

8.  E = SET_NUMBER('ACCRUAL_RATE', 2)

9.  Accruing_Frequency = 'M' /* Month */

10. Accruing_Multiplier = 1

11. E = SET_TEXT('ACCRUING_FREQUENCY',
                Accruing_Frequency)

12. E = SET_NUMBER('ACCRUING_MULTIPLIER',
                Accruing_multiplier)

13. Beginning_Of_Calculation_Year = to_date
                ('0101' || to_char(Calculation_Date, 'YYYY'), 'DDMMYYYY'
                )

14. E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR',
                Beginning_Of_Calculation_Year)
```

```

15. /*-----
      Set the start and end dates of the first accrual
      period in the calculation year.
      -----*/

16. E = GET_PERIOD_DATES
      (Beginning_of_Calculation_Year,
      Accruing_Frequency,
      Beginning_Of_Calculation_Year,
      Accruing_Multiplier)

17. First_Period_SD = get_date('PERIOD_START_DATE')
18. First_Period_ED = get_date('PERIOD_END_DATE')
19. /*-----
      Set the Calculation_Date to the Termination Date
      if not null
      ----- */

20. IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) THEN
      (
21. IF (ACP_TERMINATION_DATE < Calculation_Date) THEN
      (
22. Calculation_Date = ACP_TERMINATION_DATE
      )
      )

23. /* -----
      Get the last whole period prior to the
      Calculation Date and ensure that it is within the
      Year (if the Calculation Date is the End of a
      Period then use that period)
      ----- */

24. E = GET_PERIOD_DATES(Calculation_Date,

```

```

        Accruing_Frequency,
        Beginning_of_Calculation_Year,
        Accruing_Multiplier)
25. Calculation_Period_SD = get_date('PERIOD_START_DATE')
26. Calculation_Period_ED = get_date('PERIOD_END_DATE')
27. IF (Calculation_Date <> Calculation_Period_ED)
    THEN
    (
28.     E = GET_PERIOD_DATES
        (ADD_DAYS(Calculation_Period_SD,-1),
        Accruing_Frequency,
        Beginning_of_Calculation_Year,
        Accruing_Multiplier)
29.     Calculation_Period_SD = get_date('PERIOD_START_DATE')
30.     Calculation_Period_ED = get_date('PERIOD_END_DATE')
    )
31. /* -----
    Set the Continuous Service Global Variable using
    the Continuous Service Date (if it was entered
    when the employee enrolled in the plan) and
    otherwise using hire date, whilst also ensuring
    that the continuous service date is before the
    Calculation Period.
    ----- */
32. IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTTED)
    THEN
33. (
        E = set_date('CONTINUOUS_SERVICE_DATE',
        ACP_SERVICE_START_DATE)

```

```

)
34. ELSE
(
35. E = set_date('CONTINUOUS_SERVICE_DATE',
                ACP_CONTINUOUS_SERVICE_DATE)
)
36. Continuous_Service_Date = get_date('CONTINUOUS_SERVICE_DATE'
)
37. /* -----
Determine the date on which PTO actually starts
accruing based on Continuous Service Date, the
Start Date of the Calculation Year, and plan
Enrollment Start Date. Remember, we have already
determined whether to use hire date or CSD at
lines 32 to 35 above.
----- */
38. Actual_Accrual_Start_Date =
        greatest(ACP_ENROLLMENT_START_DATE,
                Continuous_Service_Date,
                First_Period_SD)
39. /* -----
Determine the start and end date of the first
accrual period to use in the accrual calculation.
Get the start and end dates of the accrual period
in which the Actual Accrual Start Date falls. If
the Actual Accrual Start Date does not fall on
the first day of this period, start accruing from
the next period.
-----*/

```

```

40. IF Actual_Accrual_Start_Date > First_Period_SD
    THEN
        (
41. E = GET_PERIOD_DATES(Actual_Accrual_Start_Date,
                        Accruing_Frequency,
                        Beginning_Of_Calculation_Year,
                        Accruing_Multiplier)
42. Accrual_Start_Period_SD = get_date('PERIOD_START_DATE')
43. Accrual_Start_Period_ED = get_date('PERIOD_END_DATE')
44. IF Actual_Accrual_Start_Date > Accrual_Start_Period_SD THEN
        (
45.     E = GET_PERIOD_DATES
                (add_days(Accrual_Start_Period_ED,1),
                Accruing_Frequency,
                Beginning_of_Calculation_Year,
                Accruing_Multiplier)
46.     Accrual_Start_Period_SD = get_date('PERIOD_START_DATE')
47.     Accrual_Start_Period_ED = get_date('PERIOD_END_DATE')
        )
        )
48. ELSE
        (
49. Accrual_Start_Period_SD = First_Period_SD
50. Accrual_Start_Period_ED = First_Period_ED
        )
51. /* -----
    Now set up the information that will be used
    when looping through the periods
    ----- */

```

```

52. IF Calculation_Period_ED >= Accrual_Start_Period_ED THEN
    (
53.     E = set_date('PERIOD_SD',Accrual_Start_Period_SD)
54.     E = set_date('PERIOD_ED',Accrual_Start_Period_ED)
55.     E = set_date('LAST_PERIOD_SD',Calculation_Period_SD)
56.     E = set_date('LAST_PERIOD_ED',Calculation_Period_ED)
57.     E = set_number('TOTAL_ACCRUED_PTO',0)
58.     E = LOOP_CONTROL('PTO_PERIOD_ACCRUAL')
59.     Total_Accrued_PTO = get_number('TOTAL_ACCRUED_PTO')
    )
60. IF Accrual_Start_Period_SD > Calculation_Period_ED THEN
    (
61.     Accrual_Start_Period_SD = First_Period_SD
    )
62. Effective_start_date = Accrual_Start_Period_SD
63. Effective_end_date = Calculation_Date
64. Accrual_end_date = Calculation_Period_ED
65. RETURN Total_Accrued_PTO,
66.         Effective_start_date,
67.         Effective_end_date,
68.         Accrual_end_date

```

Looping Formula

```

1.  /* -----
    NAME : PTO_PERIOD_ACCRUAL

    This formula calculates the dates between which an
    assignment is to accrue time

    -----*/
2.  /*-----

```

```

Get the global variable to be used in this formula
-----*/
3. Continuous_Service_Date = get_date('CONTINUOUS_SERVICE_DATE')
4. Total_Accrued_PTO = get_number('TOTAL_ACCRUED_PTO')
5. Period_SD = get_date('PERIOD_SD')
6. Period_ED = get_date('PERIOD_ED')
7. Last_Period_SD = get_date('LAST_PERIOD_SD')
8. Last_Period_ED = get_date('LAST_PERIOD_ED')
9. Accrual_Rate = get_number('ACCRUAL_RATE')
10. Accruing_Frequency = get_text('ACCRUING_FREQUENCY')
11. Accruing_Multiplier = get_number('ACCRUING_MULTIPLIER')
12. Beginning_of_Calculation_Year =
                                get_date('BEGINNING_OF_CALCULATION_YEAR
')
13. Ceiling = get_number('CEILING')
14. /* -----
Calculate the Amount Accrued this Period
-----*/
15. Period_Accrued_PTO = Accrual_Rate
16. /*-----
Calculate any absence or bought/sold time etc. to
be accounted for in this period.
-----*/
17. Absence = GET_ABSENCE(Period_ED,
                                Beginning_of_Calculation_Year)
18. CarryOver = GET_CARRY_OVER(Period_ED,
                                Beginning_of_Calculation_Year)
19. Other = GET_OTHER_NET_CONTRIBUTION(Period_ED,
                                Beginning_of_Calculation_Year)

```

```

20. Period_Others = CarryOver + Other - Absence
21. /* -----
    Now establish whether the Accrual this period has
    gone over the ceiling if one exists
    -----*/
22. IF (Ceiling > 0) THEN
    (
23.     IF (Total_Accrued_PTO + Period_Accrued_PTO +
           Period_Others > Ceiling) THEN
        (
24.         Amount_Over_Ceiling = Total_Accrued_PTO +
           Period_Accrued_PTO + Period_Others - Ceiling
25.         IF (Amount_Over_Ceiling > Period_Accrued_PTO)
           THEN
            (
26.             Period_Accrued_PTO = 0
            )
27.         ELSE
            (
28.             Period_Accrued_PTO = Period_Accrued_PTO -
               Amount_Over_Ceiling
            )
        )
    )
29. /*-----
    Set the Running Total
    -----*/
30. E = set_number
    ('TOTAL_ACCRUED_PTO', Total_Accrued_PTO +

```

```

                                Period_Accrued_PTO)
31. /* -----
Establish whether the current period is the last
one, if so end the processing, otherwise get the
next period
-----*/
32. IF Period_SD = Last_Period_SD THEN
    (
33.     Continue_Processing_Flag = 'N'
    )
34. ELSE
    (
35.     E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1),
                                Accruing_Frequency,
                                Beginning_of_Calculation_Year,
                                Accruing_Multiplier)
36.     E = set_date('PERIOD_SD', get_date('PERIOD_START_DATE'))
37.     E = set_date('PERIOD_ED', get_date('PERIOD_END_DATE'))
38.     Continue_Processing_Flag = 'Y'
    )
39. Return Continue_Processing_Flag

```

Changing the Length of the Accrual Periods

The accrual period is determined by the variables `Accruing_Frequency` and `Accruing_Multiplier` (lines 9 and 10 of the top level formula). You can set `Accruing_Frequency` to M (month), D (day) or W (week). For example, if the frequency is set to W and the multiplier set to 2, time is accrued every two weeks.

These examples use the calendar to measure the length of accrual periods. You can also use payroll periods. In this case, you do not need to set the variables `Accruing_Frequency` and `Accruing_Multiplier`. At lines 16, 24, 28, 41, and 45, replace the call to `get_period_dates` with a call to `get_payroll_period`. For example, replace lines 24 to 26 with:

```
E = GET_PAYROLL_PERIOD (ADD_DAYS(Calculation_Period_SD, -1))
```

```

CALCULATION_PERIOD_SD = get_date('PAYROLL_PERIOD_START_DATE')
CALCULATION_PERIOD_ED = get_date('PAYROLL_PERIOD_END_DATE')

```

Changing the Accrual Term Start Date

The accrual term start date is set to 01 January at line 13 of the sample top level formula. To use another fixed date (such as 01 June) replace this line with the following:

```

Beginning_Of_Calculation_Year = to_date
    (
        ('0106' || to_char(Calculation_Date, 'YYYY'), 'DDMMYYYY'
    )
If Beginning_Of_Calculation_Year > Calculation_Date then
    (
        Beginning_Of_Calculation_Year =
            add_months(Beginning_Of_Calculation_Year, -12)
    )

```

To start an employee's accrual term on his or her hire date anniversary, replace line 13 with:

```

Beginning_Of_Calculation_Year = to_date(
    to_char(ACP_SERVICE_START_DATE, 'DD-MM') ||
    to_char(Calculation_Date, 'YYYY'), 'DDMMYYYY')
If Beginning_Of_Calculation_Year > Calculation_Date then
    (
        Beginning_Of_Calculation_Year =
            add_months(Beginning_Of_Calculation_Year, -12)
    )

```

This example uses the ACP_SERVICE_START_DATE database item, although any substitute may be used.

Adding Start Rules for New Hires

In this sample formula, accrual for new hires begins on whichever of these dates is the latest: hire date, plan enrollment date, or continuous service date. However, you may want your top level accrual formula to check whether there is a start rule defined for the plan. The seeded PTO_PAYROLL_CALCULATION formula shows you how to do this.

In summary, the formula has to:

- Check which start rule was entered for the plan, and calculate the First_Eligible_To_Accrue_Date accordingly.
- Get the first full accrual period following the First_Eligible_To_Accrue_Date.

- Check whether the Actual_Accrual_Start_Date is after the First_Eligible_To_Accrue_Date and, if not, set the Accrual_Start_Period start and end dates to the First_Eligible_To_Accrue_Period start and end dates. This affects lines 40 to 50 of the sample formula.

There are three seeded start rules: hire date, beginning of calendar year after hire date, and six months after hire date. If you need a different start rule, define it as a value for the Lookup Type US_ACCRUAL_START_TYPE.

Then add a line to your formula, of this form:

```
IF (ACP_START = '<your new Lookup Value>') THEN (First_Eligible_To_Accrue_Date = <calculation for start date>)
```

Basing the Accrual Amount on Time or Pay Elements

You need to create database items for the element input values that determine the accrual amount. Suppose plan participants accrue one hour for every 10 hours worked. You could include this rule in your formula as follows:

```
Accrual = ACP_HOURS_WORKED / 10
```

where ACP_HOURS_WORKED is a database item. This kind of calculation would be found typically in the looping formula.

Using Up Front Accruals

The sample formula assumes that plan participants accrue a certain amount of time each month. But in some plans, participants accrue their full entitlement at the start of the accrual term. In this case the formula does not need to loop through each accrual period.

Here is a very basic sample formula, assuming an accrual of 20 days for every calendar year. There are no ineligibility rules or start rules in this example. It also does not calculate the accrual for part years (for example, for employees joining the plan midway through a year).

INPUTS ARE

```
Calculation_Date (date)
```

```
Total_Accrued_PTO = 20
```

```
Effective_start_date =
```

```
    to_date('0101' || to_char(calculation_date, 'YYYY'), 'DDMMYYYY')
)
```

```
Effective_end_date =
```

```
    to_date('3112' || to_char(calculation_date, 'YYYY'), 'DDMMYYYY')
)
```

```
Accrual_end_date =
```

```
    to_date('0101' || to_char(calculation_date, 'YYYY'), 'DDMMYYYY')
)
```

```
RETURN Total_Accrued_PTO,
```

```
Effective_start_date,  
Effective_end_date,  
Accrual_end_date
```

Changing the Ceiling

In the sample top level formula, the ceiling is set at line 7. You can change the ceiling within the formula, or set it to zero to remove the ceiling:

```
E = SET_NUMBER('CEILING', 0)
```

You can also set the ceiling outside the formula, using the Accrual Bands window or a user table.

Changing the Date Used for Continuous Service

The continuous service date is used in the formula to determine when a new hire begins to accrue time. If your plan has accrual bands based on length of service, this date also determines the amount the employee is eligible to accrue.

In the sample, length of service is calculated from hire date (using the database item ACP_SERVICE_START_DATE) or the continuous service date input value, if it was entered when the employee was enrolled in the plan (database item ACP_CONTINUOUS_SERVICE_DATE). Alternatively, you can define and use another database item. For example, replace lines 32 to 36 of the top level formula with:

```
E = set_date('CONTINUOUS_SERVICE_DATE', <NEW_DATABASE_ITEM>)  
Continuous_Service_Date = get_date('CONTINUOUS_SERVICE_DATE')
```

Adding Rules for Suspended Assignments

Some accrual plans may not allow employees to accrue PTO while on certain types of leave, such as maternity leave or study leave. In this case, your formula needs to check the status of the assignment.

For example, suppose that assignments with the status "Suspended" cannot accrue time. You can use the ASG_STATUS database item to get the value of the assignment status. Replace line 8 with:

```
IF ASG_STATUS = 'Suspended' THEN  
  
(  
  
E = SET_NUMBER('ACCRUAL_RATE', 0)  
  
)  
  
ELSE  
  
(  
  
E = SET_NUMBER('ACCRUAL_RATE', 2)  
  
)
```

Adding Rules for Part Time Employees

You can use the ASG_EMPLOYMENT_CATEGORY database item to check whether the assignment is part time or full time.

Suppose part timers accrue at only half the rate of full timers, and have a lower ceiling, then replace lines 7 and 8 with:

```
IF ASG_EMPLOYMENT_CATEGORY = 'FULL TIME' then
(
  E = SET_NUMBER('CEILING', 20)
  E = SET_NUMBER('ACCRUAL_RATE', 2)
)
ELSE
(
  E = SET_NUMBER('CEILING', 10)
  E = SET_NUMBER('ACCRUAL_RATE', 1)
)
```

If part time employees accrue at different rates depending on their hours as a percentage of full time, you could set up HR budgets to record the value of each assignment. Then you need to define a database item for the budget value.

Adding a Long Service Leave Entitlement

If you want to see how much long service leave has been awarded to an employee in the Accruals window, you need to set up a separate accrual plan. Otherwise, you can include the entitlement in the standard accrual plan. The following approach adds the long service accrual in a single accrual period, ignoring the usual accrual ceiling.

Suppose employees are entitled to a one time bonus of 10 extra days after 15 years of service. First, in the top level formula, add the following after line 57 to set up a variable that can be accessed in the looping formula:

```
e = set_number('LONG_SERVICE_ACCRUAL', 0)
```

Then, in the looping formula, calculate years service to ascertain whether the employee is entitled to long service leave. Add the following after line 13:

```
years_service = floor(months_between(period_ed,
                                     continuous_service_date)/12)
```

Next, set up a variable that can be used later to detect whether long service accrual has already been added. After line 29, add:

```
long_service_accrual = get_number('LONG_SERVICE_ACCRUAL')
IF (years_service > 15) and long_service_accrual = 0 THEN
```

```

(
    long_service_accrual = 10

    e = set_number('LONG_SERVICE_ACCRUAL', long_service_accrual)
)

ELSE

(
    long_service_accrual = 0
)

```

Finally, add any long service accrual to the total accrual, ignoring the ceiling. Replace line 30 with:

```

E = set_number('TOTAL_ACCRUED_PTO', Total_Accrued_PTO +
               Period_Accrued_PTO + long_service_accrual)

```

Using Accrual Bands Based on Length of Service

The seeded looping formulas demonstrate how to use accrual bands based on length of service criteria (entered in the Accrual Bands window). To change the sample formulas to use accrual bands:

In the top level formula:

- Remove lines 7 and 8
- Add the following after line 57:


```

E = set_number('ANNUAL_RATE', 0)

E = set_number('UPPER_LIMIT', 0)

E = set_number('CEILING', 0)

```

In the looping formula

- Remove lines 9, 10, 11, and 13
- Add the following after line 12:


```

Annual_Rate = get_number('ANNUAL_RATE')

Upper_Limit = get_number('UPPER_LIMIT')

Ceiling = get_number('CEILING')

Years_Service = Floor(Months_Between(Period_ED,
                                     Continuous_Service_Date)/12)

```

```

/*-----
If the Upper Limit was defaulted or years service
is greater than or equal to the upper limit of
the current band reset the globals to the
appropriate band.
-----*/
IF (Upper_Limit = 0 OR Years_Service >= Upper_Limit) THEN
(
  If (GET_ACCRUAL_BAND(Years_Service) = 0) THEN
  (
    Annual_Rate = get_number('ANNUAL_RATE')
    Upper_Limit = get_number('UPPER_LIMIT')
    Ceiling = get_number('CEILING')
  )
  ELSE /*function returned an error */
  (
    Continue_Processing_Flag = 'N'
    Return Continue_Processing_Flag
  )
)
Accrual_Rate = Annual_Rate / 12

```

Changing the Length of Service Units

Normally the bands entered in the Accrual Bands window refer to years. However, you can change the formula to interpret the bands as another unit, such as six months. In the sample given above to change the looping formula to use accrual bands, you would simply replace '12' with '6' in the line:

```

Years_Service = Floor(Months_Between(Period_ED,
                                Continuous_Service_Date)/12)

```

Using Accrual Bands Based on Other Criteria

You can set up a user table to hold the values you require. For example:

| | Accrual | Ceiling | Max Carry Over |
|---------|---------|---------|----------------|
| Grade A | 20 | 25 | 5 |
| Grade B | 24 | 25 | 8 |

You can also base your accrual bands on a combination of criteria (such as grade and length of service). In this case, you need to set up separate user tables for each value you want to hold (such as accrual amount, ceiling and maximum carry over). The table for accrual amount might look like this:

| | Grade A | Grade B |
|-----------------------|---------|---------|
| 0 to 5 years service | 20 | 25 |
| 5 to 50 years service | 24 | 28 |

To use data from a user table in a formula, use the GET_TABLE_VALUE function:

```
yearly_accrual = get_table_value(<table_name>, <column_name>,
                                <row_value>, <effective_date>)
```

The effective date parameter is optional. Example:

```
yearly_accrual = get_table_value ('MY_TABLE', 'GRADE A', 5)
```

Sample Accrual Formula (Belgium)

This topic suggests how you can implement a whole range of accrual plan rules in your Accrual formula. The suggestions are based on the sample seeded Belgium PTO_BE_PREVYR_MULTIPLIER formula. The sample formula is for a plan with the following rules:

- An accrual term of one calendar year starting 01 January.
- Monthly accrual periods and a fixed accrual of 2 days per month.
- Accrual for new hires begins on their hire date.

The top level formula repeatedly calls another formula in a loop to calculate the accrual for each period. Both the top level formula (PTO_BE_PREVYR_MULTIPLIER) and the looping formula (PTO_BE_PREVYR_PERIOD_ACCRUAL) are given below.

```
1. /*-----
```

```
NAME : PTO_BE_PREVYR_MULTIPLIER
```

```
This formula calculates the PTO accrued at a given
```

point in time

-----*/

2. DEFAULT FOR EMP_HIRE_DATE IS

'4712/12/31 00:00:00' (date)

3. DEFAULT FOR ACP_ENROLLMENT_START__DATE IS

'0001/01/01 00:00:00' (date)

4. DEFAULT FOR ACP_ENROLLMENT_END_DATE IS

'4712/12/31 00:00:00' (date)

5. DEFAULT FOR ACP_TERMINATION_DATE IS

'4712/12/31 00:00:00' (date)

6. DEFAULT FOR PEOPLE_BE_SCHOOL_LEAVER IS

'NO'

7. /*-----*/

The following is the date on which the number of accrued

PTO days is required.

-----*/

8. INPUTS ARE

Calculation_Date (date)

9. /*-----*/

Get the basic dates and information used in the

calculation of the accrued PTO.

-----*/

10. PrevYr = TO_CHAR(ADD_MONTHS(calculation_date,-12),'YYYY')

11. PrevYrStartDate=TO_DATE(PrevYr||'0101','YYYYMMDD')

12. PrevYrEndDate=TO_DATE(PrevYr||'1231','YYYYMMDD')

13. /*-----

Calculate the start and end dates of the current year.

. -----*/

14. CurrYr=TO_CHAR(calculation_date, 'YYYY')

15. CurrYrStartDate=TO_DATE(CurrYr||'0101','YYYYMMDD')

16. CurrYrEndDate=TO_DATE(CurrYr||'1231','YYYYMMDD')

17. /*-----

Calculate the total period over which PTO can be

accrued for the plan.

-----*/

18. AccrualPeriodStartDate=ACP_ENROLLMENT_START_DATE

19. AccrualPeriodEndDate=LEAST(ACP_ENROLLMENT_END_DATE,

ACP_TERMINATION_DATE)

```

20. /*-----

Calculate the total period over which absences can be

recorded for the plan.

-----*/

21. AbsencePeriodStartDate=ACP_ENROLLMENT_START_DATE

AbsencePeriodEnd=ACP_ENROLLMENT_END_DATE

22 /*-----

Get the date on which the employee was hired.

-----*/

23. EmpHireDate=EMP_HIRE_DATE

24. /*-----

The next section calculates the PTO they accrued

in the previous year.

-----*/

25. /*-----

School Leavers

If the school leaver joined the company and was enrolled

on the plan in the previous year, then they automatically

accrue the full entitlement for the next year i.e. 24 days.

```

If this condition is not met then the general rules apply.

-----*/

26. IF((EmpHireDate>=PrevYrStartDate)AND

27. (EmpHireDate<=PrevYrEndDate) AND

28. (AccrualPeriodStartDate<=PrevYrEndDate) AND

29. (AccrualPeriodEndDate>=PrevYrStartDate) AND

30. (PEOPLE_BE_SCHOOL_LEAVER='YES')) THEN

(

31. PrevYrAccruedPTO=24

)

32. /*-----

General rule: Accrue 2 days per complete calendar month in

the previous year when they were enrolled on the plan.

If they joined the plan on or before the 15th of the month

then the month is included. If they were terminated, then

only include the month if it was the last day of the month.

-----*/

ELSE

33. /*-----

They started accruing PTO after the end of the previous year

or ceased to accrue PTO before the start of the previous

year.

-----*/

34. IF ((AccrualPeriodStartDate>PrevYrEndDate)OR(AccrualPeriodEndDate<PrevYrStartDate))

THEN

(

35. PeriodsToCount=0

)

36. /*-----

They were eligible for accruing PTO at some point during

the previous year.

-----*/

ELSE

(

37. /*-----

Calculate the date in the previous year from which they

started accruing PTO.

```

-----*/
38. PrevYrAccrualPeriodStartDate=GREATEST(PrevYrStartDate, Accru
alPeriodStartDate)

39. /*-----

Calculate the date in the previous year from which they

stopped accruing PTO.

-----*/

40. PrevYrAccrualPeriodEndDate=LEAST(PrevYrEndDate,      Accru
alPeriodEndDate)

41. /*-----

Their eligibility started on or before the 15th of the month
so include it as a month where they can accrue PTO.

-----*/

42. IF(TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDate, 'DD'))<=1
5)THEN

(

43. StartPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDat
e, 'MM'))

)

44. /*-----

Their eligibility started after the 15th of the month so
exclude it as a month they can accrue PTO.

-----*/

```

```

ELSE

(

45. StartPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDate, 'MM'))+1

)

46. /*-----

Their eligibility ended at the end of the month so include it

as a month where they can accrue PTO

-----*/

/

47. IF (TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDate, 'DD'))<=15)THEN

(

StartPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDate, 'MM'))

)

48. /*-----

Their eligibility started after the 15th of the month so

exclude it as a month where they can accrue PTO.

-----*/

ELSE

```

```

(

49. StartPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodStartDate, 'MM'))+1

)

50. /* -----

Their eligibility ended at the end of the month so include it

as a month where they can accrue PTO.

-----*/

51. LastDayOfMonth=ADD_DAYS(TO_DATE(TO_CHAR(ADD_MONTHS(PrevYrAccrualPeriodEndDate,1), 'YYYYMM') || '01', 'YYYYMMDD'), -1)

52. IF (PrevYrAccrualPeriodEndDate=LastDayOfMonth) THEN

(

53. EndPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodEndDate, 'MM'))

)

54. /* -----

Their eligibility ended during the month so exclude it

as a month where they can accrue PTO.

-----*

/

ELSE

```

```

(
55. EndPeriodNum=TO_NUMBER(TO_CHAR(PrevYrAccrualPeriodEndDate, '
MM'))-1
)

56. /*-----
There were no periods in the previous year from which to
accrue PTO.
-----*/

57. IF((StartPeriodNum>12)OR(EndPeriodNum<1)OR(StartPeriodNum>En
dPeriodNum))

THEN

(
58. PeriodsToCount=0
)

59. /*-----
Calculate the number of periods in the previous year from
which to accrue PTO.
-----*/

ELSE

(

```

```

60. PeriodsToCount=EndPeriodNum-StartPeriodNum+1

    )

    )

61. /*-----
-

    They have at least one calendar month in which they can

    accrue PTO so loop for each month and sum the total

    accrued PTO.

-----*/
/

62. IF (PeriodsToCount>0)THEN

.   (

63. /* -----

    Set up variables to be used by the subformula.

-----*/

64. E=set_number('total_accrued_pto',0)

65. E=set_number('periods_to_count',PeriodsToCount)

66. E = set_text('prev_year',PrevYr)

67. E = set_number('period_count',1)

68. E = set_number('period_num',StartPeriodNum)

```

```

69. /*-----
      Loop for each eligible period within the previous year.
      -----*/

70. E = LOOP_CONTROL('PTO_BE_PREVYR_PERIOD_ACCRUAL')

71. /*-----
      -
      Get the total calculated accrued PTO.
      -----*
/

72. PrevYrAccruedPTO=get_number('total_accrued_pto')

      )

73. /*-----
      -
      They have no calendar months in which they can accrue PTO
      -----*
/

      Else

      (

74. PrevYrAccruedPTO=0

      )

      (

```

75. /*-----
-

Calculate the adjustment to be made to the total accrued PTO for

this year i.e any holidays already taken, any carryover, and

also any other extra entitlements/reductions (holidays

bought/sold).

-----*/

76. /*-----
-

Calculate the start date in the current year over

which to count absences.

-----*

/

77. CurrYrAbsenceStartDate=GREATEST(CurrYrStartDate, AbsencePeriodStartDate)

78. /*-----
-

Calculate the end date in the current year over

which to count absences.

-----*

/

79. CurrYrAbsenceEndDate=calculation_date

```

80. /*-----
-

Calculate the outstanding accrued PTO for the current year.

-----*
/

81. total_accrued_pto=PrevYrAccruedPTO

82. effective_start_date=CurrYrAbsenceStartDate

83. effective_end_date=CurrYrAbsenceEndDate

84. effective_end_date=CurrYrAbsenceEndDate

85. RETURN total_accrued_pto, effective_start_date, effective_en
d_date, accrual_end_date

```

Looping Formula

```

1. /*-----

NAME : PTO_BE_PREVYR_PERIOD_ACCRUAL

This formula calculates the accrued PTO for a particular

calendar month.

-----*/

2. TotalAccruedPTO=get_number('total_accrued_pto')

3. PeriodsToCount=get_number('periods_to_count')

4. PrevYr=get_text('prev_year')

5. PeriodCount=get_number('period_count')

```

```

6. PeriodNum=get_number('period_num')

8.  /*-----

    Calculate the start and end dates of the period.

9.  Note: This is always a calendar month.

....-----*/

11. CurrPerStartDate=TO_DATE(PrevYr||LPAD(TO_CHAR(PeriodNum),2,'0
')||'01','YYYYMMDD')

12. CurrPerEndDate=ADD_DAYS(ADD_MONTHS(CurrPerStartDate,1),-1)

13 /*-----

    Calculate the accrued PTO for the period. In this example 2
    days are accrued per calendar month.

    */-----

14. PeriodAccruedPTO=2

15. /* -----

    Add the accrued PTO for the period to the running total.

    -----*/

16. E=set_number('total_accrued_pto',TotalAccruedPTO+PeriodAccruedPTO)

17. /*-----

    There is at least one more period to process.

```

```

-----*/

18. IF PeriodCount+1<=PeriodsToCount THEN

    (

19. E=set_number('period_count',PeriodCount+1)

        E=set_number('period_num',PeriodNum+1)

20. continue_processing_flag='Y'

    )

21. ELSE

    (

22. continue_processing_flag='N'

    )

23. RETURN continue_processing_flag

```

Changing the Accrual Term Start and End Dates

The accrual term start date is set to 01 January at line 11 of the sample top level formula. To use another fixed date (such as 01 June) replace this line with the following:

```
PrevYrStartDate = to_date(PrevYr || '0601', 'YYYYMMDD')
```

The end date is set to 31st December at line 12 of the sample formula. To use another fixed date (such as 31st May) replace this line with the following:

```
PrevYrEndDate = to_date(PrevYr || '3105', 'YYYYMMDD')
```

Changing the Ceiling

In the sample top level formula, the ceiling is set to 0, which means that no ceiling is set. You can change the ceiling within the formula if you want to include a ceiling amount:

```
E = SET_NUMBER('CEILING', 20)
```

You can also set the ceiling outside the formula, using the Accrual Bands window or a user table.

Changing the School Leavers PTO Entitlement

The sample formula sets the amount of accrued PTO that a school leaver can receive in line 31. You can edit this amount to suit your business requirements. If the formula uses the School leaver calculation, the looping formula is not called because it does not need to loop through the eligible periods and calculate accrued PTO.

Changing the Eligibility Periods

The sample formula assumes that for an employee to be eligible to accrue PTO in a calendar month they must have joined on or before the 15th of the month. You can change this date in line 42. Lines 43 through 60 contain the logic to see if an employee is eligible to accrue the PTO for a month.

Changing the Amount of Accrued Time Allowed

The sample formula specifies a fixed amount of PTO that is allowed per calendar month. This is set in line 14 of the looping formula. You can change this to suit your business requirements:

```
PeriodAccruedPTO=3
```

A further example of an accrual formula and suggested ways of implementing accrual plan rules is described in Sample Accrual Formula, page 1-108.

Editing a Quick Paint Formula Example

If you want to add features to a generated QuickPaint formula, you must copy the formula and edit the copy. If you edit the original, your edits will be overwritten if the formula is regenerated from the QuickPaint definition.

In the following example, an automatically generated QuickPaint formula has been edited to add Line 09, which totals the input values used in the report.

```

LINE01=''
LINE02=' Pay Items      Value this Period
LINE03=''
LINE04=' Salary Value : ' + TO_TEXT(trunc((SALARY_ANNUAL/12),2))
LINE05=' Item 1 Value : ' + TO_TEXT(ITEM_1_PAY_VALUE)
LINE06=' Item 2 Value : ' + TO_TEXT(ITEM_2_PAY_VALUE)
LINE07=' Bonus Value  : ' + TO_TEXT(BONUS_AMOUNT)
LINE08='                _____'
LINE09='                Total : '+ TO_TEXT(trunc((
(SALARY_ANNUAL/12)+ITEM_1_PAY_VALUE+ITEM_2_PAY_VALUE+BONUS_AMOUNT)
,2))
LINE10=''
LINE11=''
LINE12=''
RETURN LINE01, LINE02, LINE03, LINE04, LINE05, LINE06, LINE07,
        LINE08, LINE09, LINE10, LINE11, LINE12,

```

Checking an Element Entry Example

You can use FastFormula to validate user entries in element input values. For example, you can make sure that entries are within a specified range or do not exceed a predefined value.

The formula below checks that the entry value of the Salary element does not exceed 200,000.

Salary Element

| Salary | | |
|----------------|----------|-------|
| Classification | Priority | Type |
| Earnings | 2500 | R |
| Value Name | Type | Valid |
| - Pay Value | Money | F |

hr_33a.gif

```
/* Formula Name: Salary Range */

/* Formula Type: Element Input Validation */

INPUTS ARE entry_value (text)

IF TO_NUM(entry_value) > 200000

THEN

(

    formula_status = 'e'

    formula_message = 'Too much money . . . try again!'

)

ELSE
```

```

(

    formula_status = 's'

    formula_message = 'Fine'

)

RETURN formula_status, formula_message

```

Checking a User Table Entry Example

You can use FastFormula to validate user entries into user tables that you define. For example, you can make sure that entries are between a specified range or not a negative amount.

The formula below checks that the deduction entered in the Union A column of the Union Dues table is between 10.00 and 20.00.

```

/* Formula Name: Union A Dues Validation */

/* Formula Type: User Table Validation */

INPUTS ARE entry_value (text)

IF TO_NUMBER(entry_value) < 10.00 OR

    TO_NUMBER(entry_value) > 20.00

THEN

(

    formula_status = 'e'

    formula_message = 'Error: Union A dues must be between

                        $10.00 and $20.00.'

```

```

)

ELSE

(

    formula_status = 's'

    formula_message = ' '

)

RETURN formula_status, formula_message

```

Sample Payroll Formulas Enabled for Proration (UK Only)

The following sample formulas show how you can create payroll formulas to be used in different situations requiring proration.

Oracle Corporation may change or upgrade these formulas in future releases of HRMS programs. These formulas are strictly for example or prototype purposes only, and are not intended to provide a ready-made solution to be used in your environment. You can make a copy of these formulas, subject to the terms of the license agreement for the programs, but you should not change your copied version for prototyping purposes. You should always write a new formula of your own to meet your particular requirements. These formulas may contain certain hard-coded values to simplify the use of formulas for proration.

A typical example of proration would be when a new employee starts work in the middle of a monthly payroll period and your payroll department makes a pro-rata payment to reflect the proportion of monthly pay to which the employee is entitled.

The prototype formula supplied is only designed to work for payroll calculations involving proration and should not be used for any other purpose. Any use of the formula is subject to the terms of the Oracle license agreement for the HRMS programs and documentation.

FastFormula to use if Employee is Paid using Salary Administration

```

/*****

```

```

Formula name : FF_PRORATION_SAL_MANAGEMENT

```

```

Formula to calculate salary in proration

```

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default for ASG_SALARY_BASIS_GRADE_ANNUALIZATION_FACTOR is 0

default for prorate_start is '01-JAN-1990' (date)

default for prorate_end is '01-JAN-1900' (date)

default for PAY_PROC_PERIOD_START_DATE IS '01-JAN-1950' (date)

default for PAY_PROC_PERIOD_END_DATE IS '01-JAN-1950' (date)

default for NI_NEW_TAX_YEAR IS '01-JAN-1950' (date)

default for annual_salary is 0.0

inputs are annual_salary (number),

prorate_start (date),

prorate_end (date)

/**

Prorate_start and prorate_end dates are passed from the payroll engine. These dates basically represent the dates on which the changes occur in the salary amount during the pay period. annual_salary is an input value created in the element to which this formula will be tied. Here the assumption is that the user enters the annual salary amount through salary management.

**/

```

l_amount=annual_salary

l_string = ''

if(ASG_SALARY_BASIS_GRADE_ANNUALIZATION_FACTOR was not defaulted)
  then

(

/**

  This calculation makes sure that l_amount has the annual salary.

**/

l_amount =

amount*ASG_SALARY_BASIS_GRADE_ANNUALIZATION_FACTOR

)

/**

l_tax_year_start_date derives the value from the DBI

NI_NEW_TAX_YEAR.

The following calculation sets the start date of the tax year to
01-APR-YYYY and end date of the tax year to 31-MAR-(YYYY+1)

**/

l_tax_year_start_date = NI_NEW_TAX_YEAR

l_tax_year_start_date = TRUNC(l_tax_year_start_date,'month')

l_tax_year =

```

```
TO_NUMBER(TO_CHAR(l_tax_year_start_date,'YYYY')) + 1
```

```
l_tax_year_end_date =
```

```
TO_DATE('31/03/' || TO_CHAR(l_tax_year),'DD/MM/YYYY')
```

```
/**
```

The following calculation is for the case when no proration occurs during the pay period and element entry start date and element entry end date is not equal to the pay period start and end dates respectively.

```
**/
```

```
IF(prorate_start was defaulted) then
```

```
(
```

```
IF(PAY_PROC_PERIOD_END_DATE<>ENTRY_END_DATE) THEN
```

```
(
```

```
IF(PAY_PROC_PERIOD_START_DATE<>ENTRY_START_DATE) THEN
```

```
(
```

```
/**
```

Since prorate_start date is defaulted, it means no proration occurred, therefore we simply return the annual salary amount divided by 12.

```
**/
```

```
l_amount = ROUND(amount/12,2)
```

```
result1 = l_amount
```

```
return result1
```

```
)
```

```
)
```

```
)
```

```
l_post_calc = 'N'
```

```
/**
```

```
l_post_calc is a flag used to do the calculation differently depending on the values of this flag.
```

```
**/
```

```
/**
```

```
The following if condition takes care of the case when
```

```
Either
```

```
The element entry starts on the same day as pay period start date
```

```
OR
```

```
Prorate start date IS EQUAL TO element entry start date AND
```

```
Prorate start date IS NOT EQUAL TO one day prior to pay period start date.
```

```
For example, in a monthly payroll running for the month of June 2000.
```

```
Either
```

```
Element entry start date is 01-JUN-2000 (employee starts on the first day of the payroll period)
```

OR

Prorate start date is 14-JUN-2000 (employee starts in the middle of the month or gets a salary change in the middle of the month)

Prorate start date IS NOT 31-MAY-2000

**/

if((prorate_start = ENRTY_START_DATE and

prorate_start <> ADD_DAYS(PAY_PROC_PERIOD_START_DATE,-1

)) or

ENTRY_START_DATE = PAY_PROC_PERIOD_START_DATE) then

(

/**

This code is executed when it is a new entry. Thus the post calc must be performed.

**/

l_post_calc = 'Y'

)

else

(

if(prorate_end<>ENTRY_END_DATE) then

(

```

if(prorate_end = PAY_PROC_PERIOD_END_DATE) then

)

/**

This code is executed when it is a normal last proration entry. Thus the post calc must be performed.

**/

l_post_calc = 'Y'

)

)

)

/**

The following code sets the right proration start and end dates*/

**/

if(prorate_start was defaulted) then

(

/**

Prorate start is defaulted when no proration occurs

**/

if(ENTRY_START_DATE=PAY_PROC_PERIOD_START_DATE) then

(

```

```

/**

Element entry start date is the same as the payroll period start
date

**/

prorate_start=ENTRY_START_DATE

if(ENTRY_END_DATE=PAY_PROC_PERIOD_END_DATE) then

(

prorate_end=ENTRY_END_DATE

)

else

(

prorate_end=PAY_PROC_PERIOD_END_DATE

)

r)

else if(ENTRY_END_DATE=PAY_PROC_PERIOD_END_DATE) then

(

prorate_end=ENTRY_END_DATE

prorate_start=PAY_PROC_PERIOD_START_DATE

)

)

```

```

/*Do we have to do daily calc*/

if((prorate_start>PAY_PROC_PERIOD_START_DATE

and prorate_end<PAY_PROC_PERIOD_END_DATE)

or

(prorate_start=PAY_PROC_PERIOD_START_DATE

and prorate_end<PAY_PROC_PERIOD_END_DATE

and prorate_start=ENTRY_START_DATE)) then

(

l_post_calc='D'

)

/*Now perform the calculations*/

if(l_post_calc='N') then

(

/*Perform in the pre mode, i.e.start of year to current date*/

l_days=days_between(prorate_end,

l_tax_year_start_date) + 1

l_amount1=l_amount * l_days/365

l_months=TRUNC(months_between(PAY_PROC_PERIOD_START_DATE,

l_tax_year_start_date

```

```

))

l_amount2=l_amount * l_months/12

result1=l_amount1-l_amount2

)

else

)

if(l_postcalc+'Y') then

)

/*perform in post mode, i.e.current date to end of year*/

l_days=days_between(l_tax_year_end_date,

prorate_start) + 1

l_amount1=l_amount*l_days/365

l_months=TRUNC(months_between(l_tax_year_end_date,

PAY_PROC_PERIOD_END_DATE

l_amount2=l_amount*l_months/12

result1=l_amount1-l_amount2

)

else

(

```

```

/**

This code is executed when l_post_calc=D. Perform in daily mode.

**/

l_days=days_between(prorate_end,prorate-start) + 1

l_amount1=0

l_months=0

l_amount2=0

result1=l_amount*l_days/365

)

)

/**

The following code is just to convert all the non-character variables into the character variables, so that the values of the variables could be displayed in the messages available either in SOE form or messages.

**/

prorate_start_res=to_char(prorate_start,'DD-MON-YYYY')

prorate_end_res=to_char(prorate_end,'DD-MON-YYYY')

l_days_res=TO_CHAR(l_days)

l_amount1_res=TO_CHAR(l_amount1)

```

```

l_months_res=TO_CHAR(l_months)

l_amount2_res=TO_CHAR(l_amount2)

return result1,

l_post_calc,

l_days_res,

l_amount1_res,

l_months_res,

l_amount2_res,

prorate_start_res,

prorate_end_res

```

FastFormula to use if Employee is Paid using a Spinal Point/Pay Scale

```

/*****

```

```

Formula Name = UK_PRORATION_SPINAL_POINT

```

```

Formula Type = Oracle Payroll

```

Description: This formula is executed from within the payroll run by processing the element UK Salary Spinal Point. It calculates the rate of pay and returns this value. It uses the version of the function RATES_HISTORY which requires a date input to be passed. This formula is just a prototype.

DISCLAIMER: Oracle Corporation may change or upgrade this fast formula in the future releases. This FastFormula is strictly for example or prototype purposes. This FastFormula is not intended to provide a ready-made solution to the users. This formula may contain certain hard-coded values added to simplify the concept of usage of FastFormulas in proration. Users should make a copy of this formula and not change this formula. Users need to write their own new formula(s) to meet requirements.

*****/

DEFAULT FOR date_worked IS '01-JAN-1950'(date)

DEFAULT FOR PAY_PROC_PERIOD_END_DATE IS '01-JAN-1950'(date)

DEFAULT FOR PAY_PROC_PERIOD_START_DATE IS '01-JAN-1950'(date)

DEFAULT FOR prorate_start IS '01-JAN-1950'(date)

DEFAULT FOR prorate_end IS '01-JAN-1950'(date)

inputs are prorate_start(date),

prorate_end(date)

/**

Prorate_start and prorate_end dates are passed from the payroll engine. These dates basically represent the dates on which the changes occur in the pay scale/grade rate during the pay period.

**/

amount=0

message=''

IF(prorate_start WAS DEFAULTED)then

(

```

/**

prorate_start date is defaulted when no proration occurs

**/

l_date_worked=PAY_PROC_PERIOD_END_DATE

prorate_start=PAY_PROC_PERIOD_START_DATE

prorate_end=PAY_PROC_PERIOD_END_DATE

)

else

)

l_date_worked=prorate_end

)

message1='Date defaulted to' || TO_CHAR(date_worked,'DD-MON-YYYY')

/**

The following function returns the value of the pay scale on the
l_date_worked which is last date of hte payroll period if no prora
tion occurs, otherwise it is the proration end date.

**/

if rates_history(l_date_worked,

'UK Spinal Point,

'E',

```

```

'P',

amount,

message)= -1 then

(

return message, message1

)

else

(

l_days = days_between(prorate_end,prorate_start)+ 1

/**

l_days stores the number of days between prorate start and prorate
end dates

**/

message1 = 'The value      is' || TO_CHAR(ROUND(amount,2)) || 'for=' ||
TO_CHAR(l_days || 'days from ' || TO_CHAR(prorate_start,'DD-MON-YYYY')
|| 'to' || TO_CHAR(prorate_end,'DD-MON-YYYY')

/**

The message is just for informational purposes.

**/

l_amount=amount*(12*l_days/365)

/**

```

The above calculation is hard-coded to simplify the calculation. Please write your own calculation logic. The assumption was that the value in the pay scale is monthly. Therefore to get annual amount it is multiplied by 12. Then it is divided by 365 days to get the amount for a single day. Once it is multiplied by l_days, we get the amount for the days we want.

**/

/**

It is another assumption that a year contains 365 days. Please change this assumption to take account of the leap year. This formula will not work properly in a leap year.

**/

return l_amount, message1

)

FastFormula to Use if Employee is Paid Using a Grade Rate

/*****

Formula Name = UK_PRORATION_GRADE_RATE

Formula Type = Oracle Payroll

Description: This formula is executed from within the payroll run by processing the element UK Salary Grade Rate. It calculates the rate of pay and returns this value. It uses the version of the function RATES_HISTORY which requires a date input to be passed. This formula is just a prototype.

DISCLAIMER: Oracle Corporation may change or upgrade this FastFormula in the future releases. This FastFormula is strictly for example or prototype purposes only. This FastFormula is not intended to provide a ready-made solution to the users. This formula may contain certain hard-coded values added to simplify the concept of usage of FastFormulas in proration. Users should make a copy of this formula and not change this formula. Users need to write their own new formula(s) to meet requirements.

*****/

DEFAULT FOR date_worked IS '01-JAN-1950'(date)

DEFAULT FOR PAY_PROC_PERIOD-END_DATE IS '01-JAN-1950'(date)

DEFAULT FOR PAY_PROC_PERIOD-START-DATE IS '01-JAN-1950'(date)

DEFAULT FOR prorate_start IS '01-JAN-1950'(date)

DEFAULT FOR prorate_end IS '01-JAN-1950'(date)

inputs are prorate_start(date),

prorate_end(date)

/**

Prorate_start and prorate_end dates are passed from the payroll engine. These dates basically represent the dates on which the changes occur in the pay scale/grade rate during the pay period.

**/

amount = 0

message = ''

IF(prorate_start WAS DEFAULTED)then

(

/**

prorate_start date is defaulted when no proration occurs

**/

```

l_date_worked=PAY_PROC_PERIOD_END_DATE

prorate_start=PAY_PROC_PERIOD_START_DATE

prorate_end=PAY_PROC_PERIOD_END_DATE

)

else

(

l_date_worked=prorate_end

)

message1='Date defaulted to' || TO_CHAR(date_worked,'DD-MON-YYYY')

/**

The following function returns the value of the pay scale on the
l_date_worked which is last date of the payroll period if no prora
tion occurs, otherwise it is the proration end date.

**/

if rates_history(l_date_worked,

'UK Grade Rate',

'E',

'H',

amount,

message) = -1 then

```

```

(

return message, message1

)

else

(

l_days = days_between(prorate_end,prorate_start) + 1

/**

l_days stores the number f days between prorate start and prorate
end dates

**/

message1 = 'The value      is' || TO_CHAR(ROUND(amount,2)) || for=' ||
TO_CHAR(l_days || 'days from ' || TO_CHAR(prorate_start,'DD-MON-YYYY')
|| 'to' || TO_CHAR(prorate_end,'DD-MON-YYYY')

/**

The message is just for informational purposes.

**/

l_amount=amount * ((l_days*1600)/365)

/**

The above calculation is hard-coded to simplify the calculation. P
lease write your own calculatioin logic. The assumption was that t
he value in the grade rate is hourly. Therefore to get the annual
amount it is multiplied by 16000 hours (assuming that there are 16
00 hours in a year). Then it is divided by 365 days to get the amo
unt for a single day. Once it is multiplied by l_days, we get the
amount for the days we want.

```


inputs are

prorate_start(date),

prorate_end(date),

annual_deduction(number)

/**

Prorate-start and prorate_end dates are passed from the payroll engine. These dates basically represent the dates on which the changes occur in the deduction amount during the pay period. annual_deduction is an input value created in the element to which this formula will be tied. Here the assumption is that the user enters the annual deduction amount in the input value.

**/

l_amount=annual_deduction

message='Proration Start Date' || TO_CHAR(prorate_start, 'DD-MON-YY
YY')

IF(prorate_start was defaulted)then

(

/**

prorate_start date is defaulted when no proration occurs. Therefore we should just return the annual deduction amount divided by 12
.

**/

l_amount=l_amount/12

return l_amount

```

)

else

(

l_days=days_between(prorate_end, prorate_start) + 1

/**

l_days stores the number of days between prorate start and prorate end dates

**/

l_days_in_fiscal_year=365

/**

It is another assumption that a year contains 365 days. Please change this assumption to take care of leap year. This formula will not work properly in a leap year.

**/

l_amount=(l_amount*l_days)/l_days_in_fiscal_year

/**

In the above calculation, since l_amount contains the annual deduction amount, it is divided by 365 days of the year to get the deduction amount per day. This amount is then multiplied by the number of days in question to get the proper deduction amount

**/

return l_amount, message

)

```

Sample Rates History Formulas (UK Only)

The following sample formulas show how you can create payroll formulas to be used in different situations requiring historic rates.

Oracle Corporation may change this formula in future releases. This formula is strictly for example or prototype uses only, and is not intended to provide a ready-made solution. You can make a copy of this formula but you should not change your copied version. Always write a formula of your own to meet your own requirements. This formula may contain certain hard-coded values for simplified use.

FastFormula to Calculate the Salary when Attached to a Grade Rate

```
/******
```

```
Formula name : Grade_Rate_Formula
```

```
Description : Formula to calculate the salary when attached to a  
Grade Rate
```

```
*****
```

```
inputs are date_worked(date)
```

```
amount=0
```

```
message=''
```

```
if rates_history (date_worked,
```

```
'Salary Element GR',
```

```
'E',
```

```
'P',
```

```
amount,
```

```
message)=-1 then
```

```

(
return message
)
else
(
return amount
)
.

```

FastFormula to Calculate the Salary when Attached to a Spinal Point

```

/*****

```

```

Formula name : Spinal_Point_Formula

```

```

Description : Formula to calculate the salary when attached to a
Spinal Point

```

```

*****

```

```

inputs are date_worked(date)

```

```

amount=0

```

```

message=''

```

```

if rates_history (date_worked,

```

```

'Salary Element SP',

```

```

'E',

```

```

'P',

amount,

message)=-1 then

(

return message

)

else

(

return amount

)

.

```

FastFormula to Calculate the Salary when Attached to a Global Value

```

/*****

```

```

Formula name : Global_Value_Formula

```

```

Description : Formula to calculate the salary when attached to a
Global Value

```

```

*****

```

```

inputs are date_worked(date)

```

```

amount=0

```

```

message=''

```

```

if rates_history (date_worked,

'Salary Element GV',

'E',

'P',

amount,

message)=-1 then

(

return message

)

else

(

return amount

)

.

```

FastFormula to Calculate the Salary when there is an Input Value

/*****

Formula name : Input_Value_Formula

Description : Formula to calculate the salary when there is an input value

```

inputs are date_worked(date)

amount=0

message=''

if rates_history (date_worked,

'Salary Element IV',

'E',

'P',

amount,

message)=-1 then

(

return message

)

else

(

return amount

)

.

```

FastFormula to Calculate the Overtime when there is a Rate Type

/*****

Formula name : Overtime_Formula

Description : Formula to calculate the overtime when there is an
rate type

inputs are date_worked(date)

amount=0

message=''

if rates_history (date_worked,

'Overtime Element',

'R',

'P',

amount,

message)=-1 then

(

return message

)

else

(

return amount

)

Parameters for the Rates History Function

The sample formulas can call the Rates History function. The contexts, parameters and return values for the Rates History function are as follows:

Function Rates History

```
(p_assignment_id            IN NUMBER            -- Context.  
  
 ,p_calculation_date        IN DATE  
  
 ,p_name                    IN VARCHAR2  
  
 ,p_rt_element             IN VARCHAR2  
  
 ,p_to_time_dim            IN VARCHAR2  
  
 ,p_rate                    IN OUT NUMBER  
  
 ,p_error_message          IN OUT VARCHAR2  
  
 )
```

RETURN NUMBER

| CONTEXT | => | DESCRIPTION |
|-----------------|----|--|
| ----- | | ----- |
| p_assignment_id | => | Identifier of the assignment to p rocess. |

| PARAMETER NAME | => | DESCRIPTION |
|--------------------|----|---|
| ----- | | |
| | - | |
| p_calculation_date | => | The effective date as of which the rate should be calculated. |
| p_name | => | The name of the Rate Type name or the Element to be processed. The actual meaning of the parameter depends on what is passed in the next parameter, p_rt_element. Note a valid Rate Type name must match with one of the meanings of the lookup, PQP_RATE_TYPE. |
| p_rt_element | => | Identifies what parameter, p_name refers to. Can be thought of as "mode" of operation for rates_history. Only two values are possible, 'R' or 'E'. |
| | | 'R' -> Identifies that p_name is the name of a Rate Type. |
| | | Tells rates history to derive the rate as the sum of all elements which have an extra information type, " Rate Type", set to whatever is passed in p_name |

'E' -> Identified p_name refers to the name of a single element.

p_to_time_dim => The output time dimension of the rate.

Possible values:

'H' -> Hourly

'D' -> Daily Rate

'P' -> Period

(as defined by PERIOD DIVISOR

in the contract type table)

'O' -> OT Annual Hours

'A' -> Annual

'PAY' -> Pay Period Value (as defined by MONTHLY/ WEEKLY PERIOD DIVISOR in the contract type table)

p_rate => holds the returned rate value.

p_error_message => holds the error message. In a payroll this can be passed on to

the formula run result for

error messages.

| RETURN values | => | DESCRIPTION |
|---------------|----|--|
| 0 | | Successful |
| -1 | | An error occurred. Check p_error_message for description. |

Sample Deduction Formula Calling the Arrearage Function (UK Only)

The following sample formula shows how you can create payroll formulas for pre-tax or voluntary deductions if you want to maintain an arrears balance. This formula does not handle iterative processing for pre-tax deductions. If you are writing a formula for a pre-tax deduction and you want it to handle iterative processing too, use the seeded GAYE formula as the example on which to base your own formula.

Oracle Corporation may change this formula in future releases. This formula is strictly for example or prototype uses only, and is not intended to provide a ready-made solution.

```

/* =====
=====
* SECTION (1):Default values for database items
* =====
=====
*/
Default for NET_PAY_ASG_RUN Is 0
/*
Uncomment this code if your deduction has a Clear Arrears input v
alue.
Default for Clear_Arrears Is 'N'
*/
/* =====
=====
* SECTION (2): Element Input Values
* =====
===== */
Inputs are Amount,
Percentage
/* If your deduction has a Clear Arrears input value, add Clear_A
rrears (text) to the Inputs statement. */
/* =====
=====
* SECTION (3): Initialize Local Variables
* =====
=====

```

```

*/
/* =====
=====
* SECTION (3.1): Default Iterative Arrearage Function's Out Value
S
* =====
=====
*/
l_Actual_Usercalc_Amt = 0 /* Act.Ded.Amt for the Period
*/
l_Max_Amount          = 0 /* Max Amt that can be taken, on the ea
rnings */
l_Min_Amount          = 0 /* Min Amt usually set to zero
*/
l_Not_Taken           = 0 /* Amt that could'nt be taken due to in
suff.earnings*/
l_To_Arrears          = 0 /* Amt that is added to Arrears, to be
rec.later */
l_Arrears_Taken       = 0 /* Amt that was taken from the Arrears
*/
l_Error_Message       = ' ' /* Error message from the Arrearage F
unction */
l_Warning_Message     = ' ' /* Warning message from the Arrearage
Function*/
l_Return_Value        = 0 /* Iterative Arrearage function retur
n value */
l_mesg_1 = ' ' l_mesg_2 = ' '
/* =====
=====
* SECTION (3.2): Default Local variables with DB items
* =====
=====
*/
l_clr_add_amt         = 0 /* Additional Amount */
l_clr_rep_amt         = 0 /* Replacement Amount */
l_deduction_amount    = 0 /* Actual Deduction Amount */
l_arrears_allowed     = ' '
l_partial_allowed     = ' '
/* =====
=====
* SECTION (4): Formula Calculation
* =====
=====
*/
/* =====
=====
* SECTION (4.1): Calculate the actual deduction amount
* =====
=====
*/
l_Actual_UserCalc_Amt = Amount
l_deduction_amount    = Amount
l_mesg_1 = l_mesg_1 || ' Act.Ded.Amt=' ||to_char(l_Actual_UserCalc_
Amt)
/* =====
=====
* SECTION (4.2): Get Outstanding Arrears and calculate the remain
ing amount

```

```

* i.e. the Limit Amount and Guarantee Net Amount, if any.
* =====
=====
*/
l_Return_Value = PQP_GET_ARREARAGE_OPTIONS(l_arrears_allowed
,l_partial_allowed
,l_Error_Message)
l_Remaining_Amt = 0 /*If Voluntary deduction has limits, specify
the rem. amt */
l_MaxArrears_Amt = 0 /*Out standing Arrears for the element if Ar
rears allowed */
l_Guaranteed_Net = 0
/* =====
=====
* SECTION (4.3): Call the Arrearage Function
* =====
=====
*/
l_temp_ToArrears = 0
l_temp_NotTaken = 0
/* Uncomment this code only if the element has a Clear Arrears
* input value that has a value Y or N.
If the deduction has a limit, set l_remaining_amt to the limit mi
nus the YTD deduction balance.
*/
/*
If Clear_Arrears = 'N' Then
(
l_MaxArrears_Amt = <ARREARS_BALANCE_NAME_YTD>
l_remaining_amt = l_MaxArrears_Amt
)
Else
(
l_To_Arrears = -1 * <ARREARS_BALANCE_NAME_YTD>
l_MaxArrears_Amt = 0
)
*/
l_Deduction_Amount = PQP_Arrearage
(NET_PAY_ASG_RUN /* p_net_asg_run */
,l_MaxArrears_Amt /* p_maxarrears */
,l_Deduction_Amount /* p_dedn_amt */
,l_temp_ToArrears /* p_to_arrears In Out */
,l_temp_NotTaken /* p_not_taken In Out */
,l_Arrears_Taken /* p_arrears_taken In Out */
,l_Remaining_Amt /* p_remaining_amount */
,l_Guaranteed_Net /* p_guaranteed_net */
)
If l_temp_ToArrears <> 0
/* If the deduction has a Clear Arrears input value, uncomment th
e following line*/
/* and Clear_Arrears <> 'Y' */
Then
l_To_Arrears = l_To_Arrears + l_temp_ToArrears
If l_temp_NotTaken <> 0 Then
l_Not_Taken = l_temp_NotTaken
l_mesg_2 = l_mesg_2 || 'Arr.Ded.Amt=' || to_char(l_Deduction_Amount)
l_mesg_2 = l_mesg_2 || ' Arrs=' || to_char(l_To_Arrears)
l_mesg_2 = l_mesg_2 || ' NotT=' || to_char(l_Not_Taken)

```

```

/* =====
=====
* SECTION (4.6): Formula Run Results values
* =====
=====
*/
Return l_Deduction_Amount,
l_Not_Taken,
l_To_Arrears,
l_mesg_1,
l_mesg_2

```

Sample Formulas for Payment Method (Saudi)

Oracle provides sample formulas that you can use to define payment method as per your bank's requirement.

A payment type is required to identify the method of payment for example, SA Direct Deposit - SAR. This payment type should reference the generic magnetic tape procedure.

Formulas: The following formulas are created for Electronic File Transfer (EFT):

FORMULAS:

| Formula | Description |
|------------------------|--|
| SA_EFT_HEADER | This formula is the header section of the payment output file. It calls the formula function SA_GET_CUSTOMER_FORMULA_HEADER which in turn fetches the various required fields for the header part. |
| SA_EFT_HEADER_CUSTOMER | This formula actually formats the fields fetched by the SA_EFT_HEADER formula as per the requirement. This formula is a sample and you can format the fields as per your requirement. |
| SA_EFT_BODY | This formula is the body section of the payment output file. It calls the formula function SA_GET_CUSTOMER_FORMULA_BODY which in turn fetches the various required fields for the body part. |
| SA_EFT_BODY_CUSTOMER | This formula actually formats the fields fetched by the SA_EFT_BODY formula as per the requirement. This formula is a sample and you can format the fields as per your requirement. |
| SA_EFT_FOOTER | This formula is the footer section of the payment output file. It calls the formula function SA_GET_CUSTOMER_FOOTER which in turn fetches the various required fields for the footer section. |
| SA_EFT_FOOTER_CUSTOMER | This formula actually formats the fields fetched by the SA_EFT_FOOTER formula as per the requirement. This formula is a sample and you can format the fields as per your requirement. |

Formula Functions:The following formula functions are also created:

FORMULA FUNCTIONS:

| Formula Function | Description |
|---------------------------------|---|
| SA_USER_CUSTOMER_FORMULA_HEADER | This formula function fetches the values for the fields, which are passed to it by the calling formula SA_EFT_HEADER. |
| SA_USER_CUSTOMER_FORMULA_BODY | This formula function fetches the values for the fields, which are passed to it by the calling formula SA_EFT_BODY. |
| SA_USER_CUSTOMER_FORMULA_FOOTER | This formula function fetches the values for the fields, which are passed to it by the calling formula SA_EFT_FOOTER. |

Customer Formula (Sample) Oracle Payroll provides a sample formula for you, to set up your own formulas for Header, Body and Footer. This sample is based on superset of data that supports EFT.

The following inputs are allowed in the header/footer and the body section of the payment file, to write your own formula:

Header/Footer:

- CREATION_DATE, this refers to the effective date on which the payment file is created as per Hijrah calendar (YYYYMMDD).
- PROCESS_DATE, this refers to the date on which the payment file is submitted as per Hijrah calendar (YYYYMMDD).
- COUNT 1, this refers to the total number of employees.
- SUM1, this refers to the total amount. You would multiply the total amount with hundred (100) to display the last two decimal points in your report.

Body:

- AMOUNT, this refers to the amount for each employee. You would multiply this amount with hundred (100) to display the last two decimal points in your report.
- FIRST_NAME, this refers to the first name of the employee.
- LAST_NAME, this refers to the last name of the employee.
- EMP_NO, this refers to the employee number.
- ASG_NO, this refers to the assignment number of the employee.
- LOCAL_NATIONALITY, this refers to the local nationality of the employee.

The formula that you have defined should return all the WRITE_TEXT, REPORT1_TEXT and REPORT2_TEXT variables that are set up in the formulas. WRITE_TEXT, REPORT1_TEXT, and REPORT2_TEXT are the outputs that are available for you.

At the maximum you have they can have five WRITE_TEXT, five REPORT1_TEXT and five REPORT2_TEXT variables. Each variable should not exceed 255 characters in size.

You use the following contexts for each section of your own formula and use database items for these values only.

Header / Footer:

- DATE_EARNED
- ORG_PAY_METHOD_ID
- BUSINESS_GROUP_ID
- PAYROLL_ID
- PAYROLL_ACTION_ID

Body:

- ASSIGNMENT_ID
- BUSINESS_GROUP_ID
- PER_PAY_METHOD_ID
- DATE_EARNED
- PAYROLL_ID
- PAYROLL_ACTION_ID
- ASSIGNMENT_ACTION_ID
- ORGANIZATION_ID
- TAX_UNIT_ID

Oracle Corporation may change this formula in future releases. This formula is strictly for example or prototype uses only, and is not intended to provide a ready-made solution. You can make a copy of this formula but you should not change your copied version. Always write your own formula to meet your bank's requirements. This formula may contain certain hard-coded values for simplified use.

The prototype formula supplied is only designed to work for payment method and should not be used for any other purpose. Any use of this formula is subject to the terms of Oracle license agreement for the HRMS programs and documentation.

Sample for the Header is as follows:

```
***** */
```

```
/* Formula Name: SA_EFT_HEADER
```

Description : This formula formats and writes header section of the Magnetic File. It also writes data onto the audit report.

```
***** */
```

```
/* Initialise database items */
DEFAULT FOR ORG_SA_BANK_NAME IS ' '
DEFAULT FOR ORG_SA_ACCOUNT_NUMBER IS ' '
INPUTS ARE CREATION_DATE (Text)
        ,PROCESS_DATE (Text)
        ,COUNT1 (Text)
        ,SUM1 (Text)
TRANSFER_SUM1 = SUM1
TRANSFER_COUNT1 = COUNT1
/* Customer to modify section below this */
```

```

/* File Header */
WRITE_TEXT1 = '0' + /* Header Rec */
'000000000000' + /* Key Header */
'G' + /* Month Type */
CREATION_DATE + /* File Creation Date */
PROCESS_DATE + /* Salary Process Date */
'10000' + /* Total Amount for All Employees*/
'100' + /* Total Employees*/
LPAD(ORG_SA_ACCOUNT_NUMBER,15,'0') + /* Company Account Number */
RPAD(' ',68,' ') + /*Filler*/
CHR(10)
/* Report File Header */
REPORT1_TEXT1 = ' ' + 'Header Record:' + '0
' + CHR(10) + ' ' +
'Key Header : ' + LPAD('0',12,'0') + '
+ 'File Creation Date : ' + LPAD(CREATION_DATE,12,'0') + CHR(10)
/*REPORT1_TEXT2 = 'Header Record:' + '0 ' +
'Month Type : ' + LPAD('0',12,'0') + ' '
+ 'Salary Process Date : ' + LPAD('0',12,'0') + CHR(10)
REPORT1_TEXT3 = 'Header Record:' + '0 ' +
'File Creation Date:' + LPAD('0',12,'0') +
CHR(10)
REPORT1_TEXT4 = 'Header Record:' + '0 ' +
'Salary Process Date:' + LPAD('0',12,'0') +
CHR(10)*/
REPORT1_TEXT2 = ' ' + 'Month Type : ' + LPAD('GREGORIAN'
,12,'0') + ' '
+ 'Salary Process Date : ' + LPAD(PROCESS_DATE,12,'0') + CHR(10)
REPORT1_TEXT3 = ' '
REPORT1_TEXT4 = ' '
REPORT1_TEXT5 = ' ' +
'Total Employees : ' + LPAD(COUNT1,12,'0')+
CHR(10)
/*Customer to modify section above this */
RETURN WRITE_TEXT1, REPORT1_TEXT1,
REPORT1_TEXT2,REPORT1_TEXT3,REPORT1_TEXT4,REPORT1_TEXT5,TRANSFER_
COUNT1,TRANSFER_SUM1

```

Sample Accrual Formulas for Absence (Hungary)

This topic provides four sample accrual formulas for calculating the employee's holiday entitlements as required for the Hungarian Absence Report. You can record and report the entitlement amounts for the following holiday types:

- Base Holiday
- Additional holiday for bringing up children
- Other Additional Holiday
- Sickness Holiday

The following table lists the sample accrual formulas that you can use, as supplied, or use them as models to create your own, incorporating the rules required for your accrual plans.

Hungarian Sample Formulas

| Holiday Type | Formula | Description |
|---|--------------------------------------|---|
| Base Holiday | HU_BASE_HOLIDAY MULTIPLIER | This formula calculates the accrual rate for base holiday in a specific period. See: Sample Formula for Base Holiday, page 1-182 |
| Additional Holiday for bringing up children | HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER | This formula calculates the Additional Holiday for bringing up children. See: Sample Formula for Additional Holiday, page 1-193 |
| Other Additional Holiday | HU_OTHER_ADD_HOLIDAY_MULTIPLIER | This formula calculates the Other Additional Holiday such as Youthful holiday and Additional Health Holiday. See: Sample Formula for Other Additional Holiday, page 1-205 |
| Sickness Holiday | HU_SICKNESS_HOLIDAY_MULTIPLIER | This formula calculates the Sickness Holiday. See: Sample Formula for Sickness Holiday, page 1-214 |

You can use the Carry Over Formula, HU_ABS_CARRYOVER_FORMULA to calculate any carry over for the above holiday entitlements. See: Sample Formula for Carry Over Absence, page 1-224

Sample Formula for Base Holiday (Hungary)

Oracle HRMS provides the HU_BASE_HOLIDAY MULTIPLIER sample formula to calculate the accrual rate for Base Holiday in a specific period as required for the Hungarian Absence Report. The sample formula is for an accrual plan with the following rules:

- Entitlement for Base Holiday depends on the employee's age.
- Entitlement depends on the number of days worked in a week and takes in to account any work pattern changes within the leave year.
- Base holiday for new hires begins on their hire date.
- The formula calculates proportionately if the employee's birthday falls within the current year.

The following table lists the Base Holiday entitlements for employees based on their age and a five day work pattern.

Base Holiday entitlements

| Employee's Age | Base Holiday entitlement |
|-----------------------|---------------------------------|
| Until age 24 | 20 working days holiday |
| From age 25 | 21 working days holiday |
| From age 28 | 22 working days holiday |
| From age 31 | 23 working days holiday |
| From age 33 | 24 working days holiday |
| From age 35 | 25 working days holiday |
| From age 37 | 26 working days holiday |
| From age 39 | 27 working days holiday |
| From age 41 | 28 working days holiday |
| From age 43 | 29 working days holiday |
| From age 45 | 30 working days holiday |

The following formula HU_BASE_HOLIDAY MULTIPLIER considers the employee's age and a five-day work pattern for employees to calculate the Base Holiday entitlement. The HU_BASE_HOLIDAY MULTIPLIER formula repeatedly calls another formula in a loop, HU_BASE_HOLIDAY_PERIOD_ACCRUAL to calculate the accrual for each period. You use the above formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 1-224

The top-level formula HU_BASE_HOLIDAY_MULTIPLIER and the looping formula HU_BASE_HOLIDAY_PERIOD_ACCRUAL are given below.

```
/* -----  
-----  
    NAME : HU_BASE_HOLIDAY_MULTIPLIER  
    This formula calculates the total accrued base holiday for a  
    specific period  
-----  
--*/  
  
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'  
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0  
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00' (  
date)  
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (date  
)  
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)  
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (da  
te)  
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)
```

```

INPUTS ARE Calculation_Date (date)

Accruing_Frequency = ' '
Accruing_Multiplier = 0

E = SET_DATE('CALCULATION_DATE',Calculation_Date)

/* -----
----
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-----
--*/
Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
                                     ,Accruing_Frequency
                                     ,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

Beginning_Of_Calculation_Year =
    TO_DATE('0101' || TO_CHAR(Calculation_Date,'YY
YY')
           , 'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
    Beginning_of_Calculation_Year =
        ADD_MONTHS(Beginning_Of_Calculation_Year,
-12)
)

/* -----
----
Set the start and end dates of the first accrual period in the
calculation year
-----
--*/

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year,
                    Accruing_Frequency,
                    Beginning_Of_Calculation_Year,
                    Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Calculation_Date to the Termination Date if not null
-----
--*/

```

```

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
      NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
  (
    Early_End_Date = least(ACP_TERMINATION_DATE, ACP_ENROLLMENT_END_
DATE)

    IF (Early_End_Date < Calculation_Date) THEN
      (
        Calculation_Date = Early_End_Date
      )
    )

/* -----
----
Get the last whole period prior to the Calculation_Date and ens
ure
that it is within the year (if the Calculation_Date is the end
of
a period then use that period)
-----
--*/

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Continuous Service Global Variable, whilst also
ensuring that the continuous service date is before the Calcula
tion
Period
-----
--*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
  (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE
  )
  )
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_SD) THEN
  (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                , ACP_CONTINUOUS_SERVICE_D
ATE)
  )
ELSE
  (
    E = SET_DATE('CONTINUOUS_SERVICE_DATE'
                , ACP_CONTINUOUS_SERVICE_D
ATE)
  )
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

```

```

First_Eligible_To_Accrue_Date = Continuous_Service_Date

/*-----
-----
Determine the date on which accrued PTO may first be registered
'
i.e. the date on which the Ineligibility Period expires
-----
--*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
  (
    IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_MONTHS(Continuous_Service_Date,
                    ACP_INELIGIBILITY_PERIOD_LENGTH
H*2)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_DAYS(Continuous_Service_Date,
                  ACP_INELIGIBILITY_PERIOD_LENGTH
*14)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_MONTHS(Continuous_Service_Date,
                    ACP_INELIGIBILITY_PERIOD_LENGTH
GTH)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_DAYS(Continuous_Service_Date,
                  ACP_INELIGIBILITY_PERIOD_LENGTH
*28)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_MONTHS(Continuous_Service_Date,
                    ACP_INELIGIBILITY_PERIOD_LENGTH
H*3)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
      (
        Accrual_Ineligibility_Expired_Date =
          ADD_MONTHS(Continuous_Service_Date,
                    ACP_INELIGIBILITY_PERIOD_LENGTH
H/2)
      )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN

```

```

        (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date,
                ACP_INELIGIBILITY_PERIOD_LENGT
H*6)
        )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
        (
        Accrual_Ineligibility_Expired_Date =
            ADD_DAYS(Continuous_Service_Date,
                ACP_INELIGIBILITY_PERIOD_LENGT
H*7)
        )
    ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
        (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date,
                ACP_INELIGIBILITY_PERIOD_LENGTH
*12)
        )

    IF Accrual_Ineligibility_Expired_Date > First_Eligible_To_Accru
e_Date
    AND Calculation_Date < Accrual_Ineligibility_Expired_Date THEN
        (
        First_Eligible_To_Accrue_Date = Accrual_Ineligibility_Expired
_Date
        )
    )

/* -----
-----
Get the first full period following the
First_Eligible_To_Accrue_Date
(if it falls on the beginning of the period then use that perio
d)
-----
--*/

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year T
HEN
    (
        E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
            ,Accruing_Frequency
            ,Beginning_Of_Calculation_Year
            ,Accruing_Multiplier)

        First_Eligible_To_Accrue_Period_SD = GET_DATE('PERIOD_START_DAT
E')
        First_Eligible_To_Accrue_Period_ED = GET_DATE('PERIOD_END_DATE'
)

        IF (First_Eligible_To_Accrue_Period_SD > Calculation_Period_ED)
THEN
            (
                Total_Accrued_PTO = 0
                E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
            )
        )
    )

```

```

    )
)
ELSE
(
    First_Eligible_To_Accrue_Period_SD = First_Period_SD
    First_Eligible_To_Accrue_Period_ED = First_Period_ED
)
/* -----
----
Determine the date on which PTO actually starts accruing based
on
Hire Date, Continuous Service Date and Plan Enrollment Start Da
te.
-----*/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
    Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
    Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date,
                                         ACP_ENROLLMENT_START_DATE,
                                         First_Period_SD)
)
/* -----
----
Determine the actual start date and end date of the first accru
al
period to use in the accrual calculation. Get the start date an
d
end dates of the accrual period in which the Actual Accrual
Start Date falls.
-----*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD
) THEN
(
    E = GET_PERIOD_DATES(Actual_Accrual_Start_Date,
                        Accruing_Frequency,
                        Beginning_Of_Calculation_Year,
                        Accruing_Multiplier)

    Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
    Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
If the Actual Accrual Period is after the Calculation Period th
en
end the processing.
-----*/
IF (Accrual_Start_Period_SD > Calculation_Period_ED) THEN
(

```

```

        Total_Accrued_PTO = 0
        E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
    )
)

ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
N
    (
        Accrual_Start_Period_SD = First_Eligible_To_Accrue_Perio
d_SD
        Accrual_Start_Period_ED = First_Eligible_To_Accrue_Perio
d_ED
    )
ELSE
    (
        Accrual_Start_Period_SD = First_Period_SD
        Accrual_Start_Period_ED = First_Period_ED
    )

/* -----
-----
Now set up the information that will be used in when looping
through the periods and call the accrual sub formula.
-----
--*/
IF Calculation_Period_ED >= Accrual_Start_Period_ED THEN
(
    E = set_date('PERIOD_SD',Accrual_Start_Period_SD)
    E = set_date('PERIOD_ED',Accrual_Start_Period_ED)
    E = set_date('LAST_PERIOD_SD',Calculation_Period_SD)
    E = set_date('LAST_PERIOD_ED',Calculation_Period_ED)
    E = set_number('TOTAL_ACCRUED_PTO',0)

    E = LOOP_CONTROL('HU_BASE_HOLIDAY_PERIOD_ACCRUAL')

    Total_Accrued_PTO = ROUND(get_number('TOTAL_ACCRUED_PTO'))
)

IF Accrual_Start_Period_SD <= Calculation_Period_SD THEN
(
    Accrual_end_date = Calculation_Period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date   = Calculation_Period_ED

IF Effective_Start_Date >= Effective_End_Date THEN
(
    Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO
       ,Effective_start_date
       ,Effective_end_date
       ,Accrual_end_date

```

Looping Formula

```

/* -----
-----
NAME : HU_BASE_HOLIDAY_PERIOD_ACCRUAL
This formula calculates the number of base holiday accrued for a
particular period.
-----
--*/

/*-----
-----
Get the global variable to be used in this formula
-----
--*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR person_dob IS '4712/12/31 00:00:00' (date)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')
Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year
= GET_DATE('BEGINNING_OF_CALCULATION_YEAR'
)
Calculation_Date = GET_DATE('CALCULATION_DATE')

Accrual_Rate = 0

/* -----
-----
Get the person date of birth and compute the age.
-----
--*/

Person_dob = HU_PERSON_DOB(Calculation_Date)

Age = FLOOR(MONTHS_BETWEEN(Period_ED,Person_dob)/12)

/* -----
-----
Set the payroll period, accruing frequency and accruing multipl
ier
based on the payroll.
-----
--*/

Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
,Accruing_Frequency
,Accruing_Multiplier)

/* -----
-----
Set period start date and period end date as employee hire date

```

```

and
    employee termination date if the hire date and termination date
    falls with in the calculation period.
-----
--*/

IF EMP_HIRE_DATE > Period_SD AND EMP_HIRE_DATE < Period_ED THEN
    Period_SD = EMP_HIRE_DATE

IF ACP_TERMINATION_DATE > Period_SD
    AND ACP_TERMINATION_DATE < Period_ED T
HEN
    Period_ED = ACP_TERMINATION_DATE

DOB = TO_DATE(TO_CHAR(Person_dob,'DD/MM/'))
      ||TO_CHAR(PERIOD_SD,'YYYY'),'DD/MM/YYYY')

/* -----
-----
Set the accrual rate based on the age of the employee and on fi
ve
day work pattern.
-----
--*/

IF (DOB >= PERIOD_SD AND DOB <= PERIOD_ED) AND
   (AGE = 25 OR AGE = 28 OR AGE = 31 OR AGE = 33 OR AGE = 35 OR
    AGE = 37 OR AGE = 39 OR AGE = 41 OR AGE = 43 OR AGE = 45) TH
EN
(
    X = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,ADD_DAYS(DOB,-1))
    Y = HU_ABS_GET_WORKING_DAYS(DOB,Period_ED)

    IF Age = 25 THEN
        Accrual_Rate = ((20/260)* X +(21/260)* Y)
    ELSE IF Age = 28 THEN
        Accrual_Rate = ((21/260)* X +(22/260)* Y)
    ELSE IF Age = 31 THEN
        Accrual_Rate = ((22/260)* X +(23/260)* Y)
    ELSE IF Age = 33 THEN
        Accrual_Rate = ((23/260)* X +(24/260)* Y)
    ELSE IF Age = 35 THEN
        Accrual_Rate = ((24/260)* X +(25/260)* Y)
    ELSE IF Age = 37 THEN
        Accrual_Rate = ((25/260)* X +(26/260)* Y)
    ELSE IF Age = 39 THEN
        Accrual_Rate = ((26/260)* X +(27/260)* Y)
    ELSE IF Age = 41 THEN
        Accrual_Rate = ((27/260)* X +(28/260)* Y)
    ELSE IF Age = 43 THEN
        Accrual_Rate = ((28/260)* X +(29/260)* Y)
    ELSE IF Age = 45 THEN
        Accrual_Rate = ((29/260)* X +(30/260)* Y)
    )
ELSE
(

```

```

X = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,PERIOD_ED)

IF Age <= 24 THEN
    Accrual_Rate = ((20/260)*X)
ELSE IF (Age >= 25 AND Age < 28) THEN
    Accrual_Rate = ((21/260)*X)
ELSE IF (Age >= 28 AND Age < 31) THEN
    Accrual_Rate = ((22/260)*X)
ELSE IF (Age >= 31 AND Age < 33) THEN
    Accrual_Rate = ((23/260)*X)
ELSE IF (Age >= 33 AND Age < 35) THEN
    Accrual_Rate = ((24/260)*X)
ELSE IF (Age >= 35 AND Age < 37) THEN
    Accrual_Rate = ((25/260)*X)
ELSE IF (Age >= 37 AND Age < 39) THEN
    Accrual_Rate = ((26/260)*X)
ELSE IF (Age >= 39 AND Age < 41) THEN
    Accrual_Rate = ((27/260)*X)
ELSE IF (Age >= 41 AND Age < 43) THEN
    Accrual_Rate = ((28/260)*X)
ELSE IF (Age >= 43 AND Age < 45) THEN
    Accrual_Rate = ((29/260)*X)
ELSE
    Accrual_Rate = ((30/260)*X)
)

Period_Accrued_PTO = Accrual_Rate

E = SET_NUMBER('TOTAL_ACCRUED_PTO', Total_Accrued_PTO
              +Period_Accrued_PTO)

/* -----
---
Establish whether the current period is the last one, if so end
the processing, otherwise get the next period.
-----
--*/

IF Period_SD >= Last_Period_SD THEN
    (
        Continue_Processing_Flag = 'N'
    )
ELSE
    (
        E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1),
                            Accruing_Frequency,
                            Beginning_of_Calculation_Year,
                            Accruing_Multiplier)

        E = SET_DATE('PERIOD_SD', GET_DATE('PERIOD_START_DATE'))
        E = SET_DATE('PERIOD_ED', GET_DATE('PERIOD_END_DATE'))

        Continue_Processing_Flag = 'Y'
    )

Return Continue_Processing_Flag

```

Sample Formula for Additional Holiday (Hungary)

Oracle HRMS provides the HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER sample formula to calculate the accrual rate for Additional Holiday for bringing up children in a specific period as required for the Hungarian Absence Report. The sample formula is for an accrual plan with the following rules:

- Entitlement depends on the age and number of children (given in the table below)
- Both parents work and share the entitlement. This eligibility is based on the value in the Holiday for Child Care field in the Further Contact Relationship Info on the Contact window.
- Additional Holiday for bringing up children for new hires depends on Hire Date.
- Entitlement begins from the birth date of the child, if a child is born during the leave year.

The following table lists the Additional Holiday entitlements for employees based on the number of children.

Additional Holiday entitlements

| Number of Children | Additional Holiday entitlement |
|----------------------------|---------------------------------------|
| After 1 child | 2 working days |
| After 2 children | 4 working days |
| After more than 2 children | 7 working days |

The HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER formula calls another formula HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL to calculate the accrual for each period. You use the sample formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 1-224

The sample HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER and the looping HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL formula are given below:

```
/* -----  
-----  
    NAME : HU_ADD_CHILD_CARE_HOLIDAY_MULTIPLIER  
  
    This formula calculates the total accrued additional child care  
e  
    holiday for a specific period.  
-----  
--*/  
  
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'  
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0  
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00' (DATE)  
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (DATE)  
)  
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)  
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (DATE)
```

```

TE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

INPUTS ARE
Calculation_Date (DATE)

Accruing_Frequency = ' '
Accruing_Multiplier = 0

/* -----
----
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-----
--*/

No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Calculation_Date
                                           ,Accruing_Frequency
                                           ,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* -----
----
Calculate the start and end dates of the current leave year.
-----
--*/

Beginning_Of_Calculation_Year=TO_DATE('0101' || to_char(Calculation_Date
                                                    , 'YYYY'), 'DDMMYYYY')
End_Of_Calculation_Year = TO_DATE('3112' || to_char(Calculation_Date
                                                    , 'YYYY'), 'DDMMYYYY')
')

/* -----
----
Set the start and end dates of the first accrual period in the
calculation year.
-----
--*/

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
Beginning_of_Calculation_Year =
ADD_MONTHS(Beginning_Of_Calculation_Year, -
12)
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            ,Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year

```

```

,Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

E = GET_PERIOD_DATES(End_Of_Calculation_Year
,Accruing_Frequency
,Beginning_Of_Calculation_Year
,Accruing_Multiplier)

Last_Period_SD = GET_DATE('PERIOD_START_DATE')
Last_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Calculation_Date to the Termination Date if not null
-----
--*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
(
Early_End_Date = LEAST(ACP_TERMINATION_DATE,ACP_ENROLLMENT_END_D
ATE)

IF (Early_End_Date < First_Period_SD) THEN
(
Total_Accrued_PTO = 0
E = PUT_MESSAGE('HR_52794_PTO_FML_ASG_TER')
)
IF (Early_End_Date < Last_Period_ED) THEN
(
E = GET_PERIOD_DATES(Early_End_Date
,Accruing_Frequency
,Beginning_Of_Calculation_Year
,Accruing_Multiplier)

Last_Period_SD = GET_DATE('PERIOD_START_DATE')
Last_Period_ED = GET_DATE('PERIOD_END_DATE')
)
IF (Early_End_Date < Calculation_Date) THEN
(
Calculation_Date = Early_End_Date
)
)

/* -----
----
Get the last whole period prior to the Calculation Date and ens
ure
that it is within the Year (if the Calculation Date is the End
of
a Period then use that period)
-----
--*/

E = GET_PERIOD_DATES(Calculation_Date
,Accruing_Frequency

```

```

,Beginning_of_Calculation_Year
,Accruing_Multiplier)

Calculation_Period_SD = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED = GET_DATE('PERIOD_END_DATE')

IF (Calculation_Period_ED < First_Period_SD) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52795_PTO_FML_CALC_DATE')
)

/* -----
----
Set the Continuous Service Global Variable, whilst also
ensuring that the continuous service date is before the Calcula
tion
Period
-----
--*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTTED) THEN
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE
)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_ED) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52796_PTO_FML_CSD')
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
,ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > First_Period_SD) THEN
(
  E = GET_PERIOD_DATES(ACP_CONTINUOUS_SERVICE_DATE
,Accruing_Frequency
,Beginning_of_Calculation_Year
,Accruing_Multiplier)

  First_Period_SD = GET_DATE('PERIOD_START_DATE')
  First_Period_ED = GET_DATE('PERIOD_END_DATE')
)
ELSE
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
, ACP_CONTINUOUS_SERVICE_DATE)
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

First_Eligible_To_Accrue_Date = Continuous_Service_Date

/*-----
----
Determine the date on which accrued PTo may first be registered
'
i.e the date on which the Ineligibility Period expires

```

```

-----
--*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
  IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*2
    )
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_DAYS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_DAYS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*3
    )
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH/2
    )
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*6
    )
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_DAYS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
  )
)

```

```

)
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
(
  Accrual_Ineligibility_Expired_Date =
    ADD_MONTHS(Continuous_Service_Date
              ,ACP_INELIGIBILITY_PERIOD_LENGTH*1
2)
)

IF Accrual_Ineligibility_Expired_Date
  > First_Eligible_To_Accrue_Date
AND Calculation_Date
  < Accrual_Ineligibility_Expired_Date THEN
(
  First_Eligible_To_Accrue_Date =
    Accrual_Ineligibility_Expired_Date
)
)

/* -----
----
Get the first full period following the First_Eligible_To_Accrue_
Date
(if it falls on the beginning of the period then use that period)
-----
- */

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year T
HEN
(
  E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

  First_Eligible_To_Accrue_Period_SD = GET_DATE('PERIOD_START_DA
TE')
  First_Eligible_To_Accrue_Period_ED = GET_DATE('PERIOD_END_DATE
')

  IF (First_Eligible_To_Accrue_Period_SD > Calculation_Period_ED)
THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
  )
)
ELSE
(
  First_Eligible_To_Accrue_Period_SD = First_Period_SD
  First_Eligible_To_Accrue_Period_ED = First_Period_ED
)
/* -----
----
Determine the date on which PTO actually starts accruing based
on
Hire Date, Continuous Service Date and plan Enrollment Start Da
te.

```

```

-----*/
IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date,
                                        ACP_ENROLLMENT_START_DATE,
                                        First_Period_SD)
)
/* -----
-----
          Determine the actual start of the accrual calculation
-----
--*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD
)
THEN
(
  E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)

  Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
  Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')

/*-----
-----
If the Actual Accrual Period is after the Calculation Period then
end the processing.
-----
- */
  IF (Accrual_Start_Period_SD > Calculation_period_ED) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
  )
)
ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THEN
(
  Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
  Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
  Accrual_Start_Period_SD = First_Period_SD
  Accrual_Start_Period_ED = First_Period_ED
)
/*-----
-----

```

```

-----
Now set up the information that will be used in when looping through
the periods
-----
- */
IF Last_period_ED >= Accrual_Start_Period_ED THEN
(
  E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
  E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
  E = SET_DATE('LAST_PERIOD_SD',Calculation_period_SD)
  E = SET_DATE('LAST_PERIOD_ED',Calculation_period_ED)
  E = SET_NUMBER('TOTAL_ACCRUED_PTO',0)

  E = LOOP_CONTROL('HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL')

  Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
)

IF Accrual_Start_Period_SD <= Calculation_period_ED THEN
(
  Accrual_end_date = Calculation_period_ED
)

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date = Calculation_period_ED

IF Effective_Start_Date >= Effective_End_Date THEN
(
  Effective_Start_Date = Effective_End_Date
)

RETURN Total_Accrued_PTO
       ,Effective_start_date
       ,Effective_end_date
       ,Accrual_end_date

```

Looping Formula

```

/* -----
-----
NAME : HU_ADD_CHILD_CARE_HOLIDAY_PERIOD_ACCRUAL
This formula calculates the amount of PTO accrued for a particular
period
-----
--*/

/*-----
-----
Get the global variable to be used in this formula
-----
--*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

```

```

Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')
Termination_date = GET_DATE('ACP_TERMINATION_DATE')
Hire_date = GET_DATE('ACP_SERVICE_START_DATE')

Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year =
    GET_DATE('BEGINNING_OF_CALCULATION_YEAR
')

First_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')
Second_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')
Third_Child_Date_of_birth = TO_DATE('01-01-4712','dd-mm-yyyy')

/* -----
----
Set the payroll period, accruing frequency, and accruing multip
lier
based on the payroll.
-----
--*/

No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Period_SD
,Accruing_Frequency
,Accruing_Multiplier)

No_Of_Children_less_16 = 0
No_Of_Children_16 = 0

/* -----
----
Retrieve child information for the current employee.
-----
- */

E = HU_ABS_GET_CHILD_INFO(Period_SD, Period_ED
, No_Of_Children_less_16
, No_Of_Children_16
, First_Child_Date_of_birth
, Second_Child_Date_of_birth
, Third_Child_Date_of_birth)

Total_children = No_Of_Children_less_16 + No_Of_Children_16
Period_Accrued_PTO = 0

Total_days = DAYS_BETWEEN(Period_ED , Period_SD)
days_valid = DAYS_BETWEEN(Period_ED , Period_SD)
Accrual_Rate = 0

/* -----
----
Set accrual rate based on number of children and their age.
-----
- */

```

```

IF Total_children = 1 THEN
( Accrual_Rate = 2 )
ELSE IF Total_children = 2 THEN
( Accrual_Rate = 4 )
ELSE IF Total_children > 2 THEN
( Accrual_Rate = 7)

Accrual_rate_per_period = Accrual_Rate/No_of_Payroll_Periods

/* -----
----
Days worked prorated based on hire date and termination date of
employee.
-----
--*/

IF Hire_date >= Period_SD
AND Hire_date <= Period_ED
AND Termination_date >= Period_SD
AND Termination_date <= Period_ED THEN
(
days_valid = DAYS_BETWEEN(Termination_date,Hire_date)
)
ELSE IF Hire_date >= Period_SD
AND Hire_date <= Period_ED THEN
(
days_valid = DAYS_BETWEEN(Period_ED,Hire_date)
)
ELSE IF Termination_date >= Period_SD
AND Termination_date <= Period_ED THEN
(
days_valid = DAYS_BETWEEN(Termination_date,Period_SD)
)
Accrual_rate_per_period = Accrual_rate_per_period
*(days_valid/ Total_days)

/* -----
----
Calculate the Amount Accrued this Period-
-----
--*/
IF No_Of_Children_16 = 0 or No_Of_Children_less_16 > 2 THEN
(
Period_Accrued_PTO = Accrual_rate_per_period
)
ELSE
(
IF No_Of_Children_16 = 1 THEN
(
days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)
)
Period_Accrued_PTO = Accrual_rate_per_period
*(days_valid / Total_days )
)

```

```

IF No_Of_Children_less_16 = 1 THEN
(
  Period_Accrued_PTO = Period_Accrued_PTO
                      +(2*((Total_days-days_valid)/Total_da
ys))
                      /No_of_Payroll_Periods
)
IF No_Of_Children_less_16 = 2 THEN
(
  Period_Accrued_PTO = Period_Accrued_PTO
                      +(4*((Total_days-days_valid)/Total_da
ys))
                      /No_of_Payroll_Periods
)
)
ELSE IF No_Of_Children_16 = 2 THEN
(
  IF No_Of_Children_less_16 > 1 THEN
  (
    days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth,Period_SD)

    Period_Accrued_PTO = Accrual_rate_per_period
                        *(days_valid / Total_days)
    Period_Accrued_PTO = Period_Accrued_PTO
                        +(4*((Total_days-days_valid)/Total_da
ys))
                        /No_of_Payroll_Periods
  )
)
ELSE IF No_Of_Children_less_16 > 0 THEN
(
  days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_
SD)
  Period_Accrued_PTO = Accrual_rate_per_period
                      *(days_valid / Total_days)

  days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
,First_Child_Date_of_birth)

  Period_Accrued_PTO = Period_Accrued_PTO
                      +(4 *(days_valid / Total_days))
                      /No_of_Payroll_Periods

  days_valid = DAYS_BETWEEN(Period_ED
,Second_Child_Date_of_birth)

  Period_Accrued_PTO = Period_Accrued_PTO
                      +(2 *(days_valid / Total_days))
                      /No_of_Payroll_Periods
)
ELSE IF No_Of_Children_less_16 = 0 THEN
(
  days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_
SD)
  Period_Accrued_PTO = Accrual_rate_per_period
                      *(days_valid / Total_days)

  days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
,First_Child_Date_of_birth)
)

```

```

        Period_Accrued_PTO = Period_Accrued_PTO +
                               (2 * (days_valid / Total_days))
                               /No_of_Payroll_Periods
    )
)
ELSE IF No_Of_Children_16 = 3 THEN
(
    IF No_Of_Children_less_16 > 1 THEN
    (
days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth,Period_SD)

        Period_Accrued_PTO = Accrual_rate_per_period
                               *(days_valid / Total_days)
        Period_Accrued_PTO = Period_Accrued_PTO
                               +(4*((Total_days-days_valid)
                               / Total_days))
                               /No_of_Payroll_Periods
    )
    ELSE IF No_Of_Children_less_16 > 0 THEN
    (
days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                               ,Period_SD)
        Period_Accrued_PTO = Accrual_rate_per_period
                               *(days_valid / Total_days)

days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth
                               ,Second_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                               +(4 * (days_valid / Total_days))
                               /No_of_Payroll_Periods

days_valid = DAYS_BETWEEN(Period_ED,Third_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                               +(2 * (days_valid / Total_days))
                               /No_of_Payroll_Periods
    )
    ELSE IF No_Of_Children_less_16 = 0 THEN
    (
days_valid = DAYS_BETWEEN(First_Child_Date_of_birth,Period_SD)

        Period_Accrued_PTO = Accrual_rate_per_period
                               *(days_valid / Total_days)

days_valid = DAYS_BETWEEN(Second_Child_Date_of_birth
                               ,First_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO
                               +(4 * (days_valid / Total_days))
                               /No_of_Payroll_Periods

days_valid = DAYS_BETWEEN(Third_Child_Date_of_birth
                               ,Second_Child_Date_of_birth)

        Period_Accrued_PTO = Period_Accrued_PTO

```

```

                +(2 * (days_valid / Total_days))
                /No_of_Payroll_Periods
            )
        )
    )

/*-----
-----
    Set the Running Total
-----
--*/

E = SET_NUMBER('TOTAL_ACCRUED_PTO'
              ,Total_Accrued_PTO + Period_Accrued_PTO)

/* -----
-----
    Establish whether the current period is the last one, if so en
d
    the processing, otherwise get the next period
-----
--*/

IF Period_SD >= Last_Period_SD THEN
(
    Continue_Processing_Flag = 'N'
)
ELSE
(
    E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1)
                        ,Accruing_Frequency
                        ,Beginning_of_Calculation_Year
                        ,Accruing_Multiplier)

    E = SET_DATE('PERIOD_SD'
                ,GET_DATE('PERIOD_START_DATE'))
    E = SET_DATE('PERIOD_ED'
                ,GET_DATE('PERIOD_END_DATE'))

    Continue_Processing_Flag = 'Y'
)

RETURN Continue_Processing_Flag

```

Sample Formula for Other Additional Holiday (Hungary)

Oracle HRMS provides the HU_OTHER_ADD_HOLIDAY_MULTIPLIER formula to calculate the Other Additional Holiday as required for the Hungarian Absence Report. The Other Additional Holiday comprises of Youthful Holiday and Additional Health Holiday. The sample formula is for an accrual plan with the following rules:

- Employee under 18 years of age entitled to an additional 5 days holiday.
- Blind employee entitled to an additional 5 days holiday. This eligibility is based on the information recorded on the Blind field on the Disabilities window.

- Employee working underground or exposed to radiation entitled to an additional 5 days holiday. This eligibility is based on the information recorded on the Additional Health Holiday field on the Further Job Info in the Job window.
- Entitlement depends on the number of days worked in a week. The formula takes into account any work pattern changes.
- Entitlement begins or ends from the date of change, if the shift or disability change during the leave year.
- Other Additional Holiday for new hires begins on their Hire Date.

The top level formula, HU_OTHER_ADD_HOLIDAY_MULTIPLIER calls another formula called HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL calculate the accrual for each period. You use the formulas along with the carry over formula HU_ABS_HOLIDAY_CARRY_OVER. See: Sample Formula for Carry Over Absence, page 1-224

The top-level formula, HU_OTHER_ADD_HOLIDAY_MULTIPLIER and the looping formula HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL are given below.

```

/* -----
-----
NAME : HU_OTHER_ADD_HOLIDAY_MULTIPLIER

This formula calculates the total accrued other additional holi
day
for a specific period.
-----

--*/
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00'(date)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (date)
)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)

INPUTS ARE Calculation_Date (date)
Accruing_Frequency = ' '
Accruing_Multiplier = 0
E = SET_DATE('CALCULATION_DATE',Calculation_Date)

/* -----
-----
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-----

--*/

Payroll_period = HU_PAYROLL_PERIODS(Calculation_Date
,Accruing_Frequency
,Accruing_Multiplier)

```

```

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* -----
----
Calculate the start and end dates of the current leave year
-----
--*/

Beginning_Of_Calculation_Year =
    TO_DATE('0101' || TO_CHAR(Calculation_Date, 'YYY
Y')
        , 'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
    Beginning_of_Calculation_Year =
        ADD_MONTHS(Beginning_Of_Calculation_Year, -12
    )
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
    , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
    , Accruing_Frequency
    , Beginning_Of_Calculation_Year
    , Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Calculation_Date to the Termination Date if not null
-----
--*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTTED) OR
    NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTTED) THEN
(
    Early_End_Date = LEAST(ACP_TERMINATION_DATE
        , ACP_ENROLLMENT_END_DATE)

    IF (Early_End_Date < Calculation_Date) THEN
    (
        Calculation_Date = Early_End_Date
    )
)

/* -----
----
Get the last whole period prior to the Calculation Date and ens
ure
that it is within the Year (if the Calculation Date is the En
d
of a Period then use that period)
-----

```

```

--*/

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Continuous Service Global Variable, whilst also
ensuring that the continuous service date is before the
Calculation Period
-----
--*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED) THEN
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE
)
)
ELSE IF (ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_SD) THEN
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
              ,ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
              ,ACP_CONTINUOUS_SERVICE_DATE)
)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')

First_Eligible_To_Accrue_Date = Continuous_Service_Date

/*-----
----
Determine the date on which accrued PTO may first be registered
,
i.e the date on which the Ineligibility Period expires
-----
--*/

Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
  IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
                ,ACP_INELIGIBILITY_PERIOD_LENGTH*2)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
  (

```

```

        Accrual_Ineligibility_Expired_Date =
            ADD_DAYS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_DAYS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*3)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH/2)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*6)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_DAYS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
    )
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
    (
        Accrual_Ineligibility_Expired_Date =
            ADD_MONTHS(Continuous_Service_Date
                    ,ACP_INELIGIBILITY_PERIOD_LENGTH*12)
    )

    IF Accrual_Ineligibility_Expired_Date >
        First_Eligible_To_Accrue_
Date
    AND Calculation_Date < Accrual_Ineligibility_Expired_Date THE
N
    (
        First_Eligible_To_Accrue_Date =
            Accrual_Ineligibility_Expired_
Date
    )
)

```

```

/* -----
-----
    Get the first full period following the
    First_Eligible_To_Accrue_Date(if it falls on the beginning of t
he
    period then use that period)
-----
--*/

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year T
HEN
(
    E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)

    First_Eligible_To_Accrue_Period_SD = GET_DATE('PERIOD_START_DAT
E')
    First_Eligible_To_Accrue_Period_ED = GET_DATE('PERIOD_END_DATE'
)

    IF (First_Eligible_To_Accrue_Period_SD > Calculation_Period_ED)
THEN
    (
        Total_Accrued_PTO = 0
        E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
    )
)
ELSE
(
    First_Eligible_To_Accrue_Period_SD = First_Period_SD
    First_Eligible_To_Accrue_Period_ED = First_Period_ED
)
/* -----
-----
    Determine the date on which PTO actually starts accruing based
on
    Hire Date, Continuous Service Date and plan Enrollment Start Da
te.
-----
--*/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
    Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
    Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date
                                        ,ACP_ENROLLMENT_START_DATE
                                        ,First_Period_SD)
)

/* -----
-----

```

```

Determine the actual start of the accrual calculation
-----
--*/
IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD)
THEN
(
    E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)

    Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
    Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
    If the Actual Accrual Period is after the Calculation Period th
en
    end the processing.
-----
--*/
    IF (Accrual_Start_Period_SD > Calculation_Period_ED) THEN
    (
        Total_Accrued_PTO = 0
        E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
    )
)

ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THE
N
(
    Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
    Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
    Accrual_Start_Period_SD = First_Period_SD
    Accrual_Start_Period_ED = First_Period_ED
)

/* -----
----
    Now set up the information that will be used in when looping
through the periods.
-----
--*/
IF Calculation_Period_ED >= Accrual_Start_Period_ED THEN
(
    E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
    E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
    E = SET_DATE('LAST_PERIOD_SD',Calculation_Period_SD)
    E = SET_DATE('LAST_PERIOD_ED',Calculation_Period_ED)
    E = SET_NUMBER('TOTAL_ACCRUED_PTO',0)

    E = LOOP_CONTROL('HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL')

```

```

        Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
    )

    IF Accrual_Start_Period_SD <= Calculation_Period_SD THEN
    (
        Accrual_end_date = Calculation_Period_ED
    )

    Effective_Start_Date = Accrual_Start_Period_SD
    Effective_End_Date   = Calculation_Period_ED

    IF Effective_Start_Date >= Effective_End_Date THEN
    (
        Effective_Start_Date = Effective_End_Date
    )

    RETURN Total_Accrued_PTO
           ,Effective_start_date
           ,Effective_end_date
           ,Accrual_end_date

```

Looping Formula

```

/* -----
-----
NAME : HU_OTHER_ADD_HOLIDAY_PERIOD_ACCRUAL

    This formula calculates the amount of PTO accrued for a particular
    period.
-----
--*/

DEFAULT FOR PER_DATE_OF_BIRTH IS '4712/12/31 00:00:00' (date)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (date)
DEFAULT FOR Person_dob IS '4712/12/31 00:00:00' (date)

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')
Payroll_Year_SD = GET_DATE('PAYROLL_YEAR_SD')
Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
beginning_year = GET_DATE('BEGINNING_OF_CALCULATION_YEAR')
Calculation_Date=GET_DATE('CALCULATION_DATE')

/* -----
-----
    Get the person date of birth and compute the age.
-----
--*/

Person_dob = HU_PERSON_DOB(Calculation_Date)

```

```

Age = FLOOR(MONTHS_BETWEEN(Period_ED, Person_dob)/12)

/* -----
----
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-----
--*/

P= HU_PAYROLL_PERIODS( Calculation_Date
                      ,Accruing_Frequency
                      ,Accruing_Multiplier)

Accrual_Rate =0
st_date=beginning_year
ed_date=TO_DATE('3112' || TO_CHAR(beginning_year,'YYYY'),'DDMMYYYY'
)

IF EMP_HIRE_DATE > Period_SD AND EMP_HIRE_DATE < Period_ED THEN
(
  Period_SD= EMP_HIRE_DATE
)
IF ACP_TERMINATION_DATE > Period_SD AND
  ACP_TERMINATION_DATE < Period_ED THEN
(
  Period_ED=ACP_TERMINATION_DATE
)

DOB=TO_DATE(TO_CHAR(Person_dob,'DD/MM/') || TO_CHAR(PERIOD_SD,'YYYY'
)
           , 'DD/MM/YYYY')

/* -----
----
Set accrual rate based on age and working pattern.
-----
--*/

IF Age = 18 and DOB>=PERIOD_SD and DOB<=PERIOD_ED THEN
(
  x1 = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,ADD_DAYS(DOB,-1))
  Accrual_Rate = (5/260*x1)
)
ELSE IF Age<18 THEN
(
  x1 = HU_ABS_GET_WORKING_DAYS(PERIOD_SD,PERIOD_ED)
  Accrual_Rate =5/260*x1
)
ELSE
(
  Accrual_Rate =0
)
Period_Accrued_PTO=Accrual_Rate
/* -----
----
Checking for Blind Days
-----
--*/

```

```

Accrual_Rate =0
Accrual_Rate =HU_ABS_GET_BLIND_DAYS(Period_SD,Period_ED)*5/260

Period_Accrued_PTO=Period_Accrued_PTO+Accrual_Rate

/* -----
----
Checking the additional health of employees.
-----
--*/

Accrual_Rate = 0
Accrual_Rate = HU_ABS_GET_JOB_DAYS(Period_SD,Period_ED)*5/260
Period_Accrued_PTO = Period_Accrued_PTO + Accrual_Rate

/*-----
----
Set the Running Total for Total_Accrued_PTO
-----
--*/
E = SET_NUMBER('TOTAL_ACCRUED_PTO',Total_Accrued_PTO
              + Period_Accrued_PTO)

/* -----
----
Establish whether the current period is the last one, if so end
the processing, otherwise get the next period
-----
--*/
IF Period_SD >= Last_Period_SD THEN
(
Continue_Processing_Flag = 'N'
)
ELSE
(
E = GET_PAYROLL_PERIOD(ADD_DAYS(Period_ED,1))
E = SET_DATE('PERIOD_SD',GET_DATE('PAYROLL_PERIOD_START_DATE'))
)
E = SET_DATE('PERIOD_ED',GET_DATE('PAYROLL_PERIOD_END_DATE'))
Continue_Processing_Flag = 'Y'
)

RETURN Continue_Processing_Flag

```

Sample Formula for Sickness Holiday (Hungary)

Oracle HRMS provides the HU_SICKNESS_HOLIDAY_MULTIPLIER to calculate the Sickness Holiday as required for the Hungarian Absence Report. The sickness holiday is based on the following rules:

- Annual sickness holiday of fifteen days.
- Entitlement depends on the number of days worked in a week. The formula calculates proportionately if the work pattern changes within the leave year.

- Entitlement depends on the sickness holiday the employee has taken in the previous employment.

The HU_SICKNESS_HOLIDAY_MULTIPLIER calls another formula, HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL to calculate the accrual within a specific period. There is no carry over formula for Sickness Holiday.

The top-level formula, HU_SICKNESS_HOLIDAY_MULTIPLIER, and the looping formula HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL are given below.

```

/* -----
-----
NAME : HU_SICKNESS_HOLIDAY_MULTIPLIER
This formula calculates the total accrued sickness holiday for a
specific period.
-----*
/

DEFAULT FOR ACP_INELIGIBILITY_PERIOD_TYPE IS 'CM'
DEFAULT FOR ACP_INELIGIBILITY_PERIOD_LENGTH IS 0
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00'(D
ATE)
DEFAULT FOR ACP_ENROLLMENT_END_DATE IS '4712/12/31 00:00:00' (DATE
)
DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_ENROLLMENT_START_DATE IS '4712/12/31 00:00:00' (DA
TE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)

INPUTS ARE Calculation_Date (DATE)

Accruing_Frequency = ' '
Accruing_Multiplier = 0

/* -----
-----
Set the payroll period, accruing frequency, and accruing multiplie
r
based on the payroll.
-----*
/
No_of_Payroll_Periods = HU_PAYROLL_PERIODS (Calculation_Date
,Accruing_Frequency
,Accruing_Multiplier)

E = SET_TEXT('ACCRUING_FREQUENCY', Accruing_Frequency)
E = SET_NUMBER('ACCRUING_MULTIPLIER', Accruing_Multiplier)

/* -----
-----
Calculate the start and end Dates of the current leave year
-----*
Beginning_Of_Calculation_Year = TO_DATE('0101'
||TO_CHAR(Calculation_Date
,'YYYY')
,'DDMMYYYY')
End_Of_Calculation_Year = to_DATE('3112' || TO_CHAR(Calculation_Date

```

```

                                , 'YYYY')
                                , 'DDMMYYYY')

IF Beginning_Of_Calculation_Year > Calculation_Date THEN
(
  Beginning_of_Calculation_Year = ADD_MONTHS(Beginning_Of_Calculat
ion_Year
                                , -12)
)

E = SET_DATE('BEGINNING_OF_CALCULATION_YEAR'
            , Beginning_Of_Calculation_Year)

E = GET_PERIOD_DATES(Beginning_of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

First_Period_SD = GET_DATE('PERIOD_START_DATE')
First_Period_ED = GET_DATE('PERIOD_END_DATE')

E = GET_PERIOD_DATES(End_Of_Calculation_Year
                    ,Accruing_Frequency
                    ,Beginning_Of_Calculation_Year
                    ,Accruing_Multiplier)

Last_Period_SD = GET_DATE('PERIOD_START_DATE')
Last_Period_ED = GET_DATE('PERIOD_END_DATE')

/* -----
----
Set the Calculation_Date to the Termination Date if not null
-----
--*/

IF NOT (ACP_TERMINATION_DATE WAS DEFAULTED) OR
NOT (ACP_ENROLLMENT_END_DATE WAS DEFAULTED) THEN
(
  Early_End_Date = LEAST(ACP_TERMINATION_DATE
                        ,ACP_ENROLLMENT_END_DATE)
  IF (Early_End_Date < First_Period_SD) THEN
  (
    Total_Accrued_PTO = 0
    E = PUT_MESSAGE('HR_52794_PTO_FML_ASG_TER')
  )
  IF (Early_End_Date < Last_Period_ED) THEN
  (
    E = GET_PERIOD_DATES(Early_End_Date
                        ,Accruing_Frequency
                        ,Beginning_Of_Calculation_Year
                        ,Accruing_Multiplier)
    Last_Period_SD = GET_DATE('PERIOD_START_DATE')
    Last_Period_ED = GET_DATE('PERIOD_END_DATE')
  )
  IF (Early_End_Date < Calculation_Date) THEN
  (
    Calculation_Date = Early_End_Date
  )
)
)

```

```

)

/* -----
----
Get the last whole period prior to the Calculation Date and ensure
that it is within the Year (if the Calculation Date is the End of
a
Period then use that period)
-----
-- */

E = GET_PERIOD_DATES(Calculation_Date
                    ,Accruing_Frequency
                    ,Beginning_of_Calculation_Year
                    ,Accruing_Multiplier)

Calculation_Period_SD = GET_DATE('PERIOD_START_DATE')
Calculation_Period_ED = GET_DATE('PERIOD_END_DATE')

IF (Calculation_Period_ED < First_Period_SD) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52795_PTO_FML_CALC_DATE')
)
/* -----
----
Set the Continuous Service Global Variable, whilst also
ensuring that the continuous service date is before the
Calculation Period
-----
*/

IF (ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTTED) THEN
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE', ACP_SERVICE_START_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > Calculation_Period_ED) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52796_PTO_FML_CSD')
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
              , ACP_CONTINUOUS_SERVICE_DATE)
)
ELSE IF(ACP_CONTINUOUS_SERVICE_DATE > First_Period_SD) THEN
(
  E = GET_PERIOD_DATES(ACP_CONTINUOUS_SERVICE_DATE,
                      Accruing_Frequency,
                      Beginning_Of_Calculation_Year,
                      Accruing_Multiplier)
  First_Period_SD = GET_DATE('PERIOD_START_DATE')
  First_Period_ED = GET_DATE('PERIOD_END_DATE')
)
ELSE
(
  E = SET_DATE('CONTINUOUS_SERVICE_DATE'
              , ACP_CONTINUOUS_SERVICE_DATE)
)

```

```

Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
First_Eligible_To_Accrue_Date = Continuous_Service_Date

/*-----
----
Determine the date on which accrued PTo may first be registered,
i.e the date on which the Ineligibility Period expires
-----*/
Accrual_Ineligibility_Expired_Date = First_Eligible_To_Accrue_Date

IF (ACP_INELIGIBILITY_PERIOD_LENGTH > 0) THEN
(
  IF ACP_INELIGIBILITY_PERIOD_TYPE = 'BM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*2
    )
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'F' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_DAYS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*14)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'CM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'LM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_DAYS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*28)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Q' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*3)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SM' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH/2)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'SY' THEN
  (
    Accrual_Ineligibility_Expired_Date =
      ADD_MONTHS(Continuous_Service_Date
        ,ACP_INELIGIBILITY_PERIOD_LENGTH*6)
  )
  ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'W' THEN

```

```

(
  Accrual_Ineligibility_Expired_Date =
    ADD_DAYS(Continuous_Service_Date
             ,ACP_INELIGIBILITY_PERIOD_LENGTH*7)
)
ELSE IF ACP_INELIGIBILITY_PERIOD_TYPE = 'Y' THEN
(
  Accrual_Ineligibility_Expired_Date =
    ADD_MONTHS(Continuous_Service_Date
              ,ACP_INELIGIBILITY_PERIOD_LENGTH*12)
)
IF Accrual_Ineligibility_Expired_Date > First_Eligible_To_Accrue
_Date
AND Calculation_Date < Accrual_Ineligibility_Expired_Date THEN
(
  First_Eligible_To_Accrue_Date = Accrual_Ineligibility_Expired_
Date
)
)
)

/* -----
----
Get the first full period following the
First_Eligible_To_Accrue_Date (if it falls on the beginning of the
period then use that period)
----- */
/

IF First_Eligible_To_Accrue_Date > Beginning_Of_Calculation_Year T
HEN
(
  E = GET_PERIOD_DATES(First_Eligible_To_Accrue_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)
  First_Eligible_To_Accrue_Period_SD = GET_DATE('PERIOD_START_DAT
E')
  First_Eligible_To_Accrue_Period_ED = GET_DATE('PERIOD_END_DATE'
)

  IF (First_Eligible_To_Accrue_Period_SD > Calculation_period_ED)
THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52793_PTO_FML_ASG_INELIG')
)
)
ELSE
(
  First_Eligible_To_Accrue_Period_SD = First_Period_SD
  First_Eligible_To_Accrue_Period_ED = First_Period_ED
)
)

/* -----
----
Determine the date on which PTO actually starts accruing based
on Hire Date,Continuous Service Date and plan Enrollment Start

```

```

Date.
----- *
/

IF Continuous_Service_date = ACP_CONTINUOUS_SERVICE_DATE THEN
(
  Actual_Accrual_Start_Date = Continuous_service_Date
)
ELSE
(
  Actual_Accrual_Start_Date = GREATEST(Continuous_Service_Date
                                     ,ACP_ENROLLMENT_START_DATE
                                     ,First_Period_SD)
)

/* -----
----
Determine the actual start of the accrual calculation
-----*
/

IF (Actual_Accrual_Start_Date > First_Period_SD AND
    Actual_Accrual_Start_Date > First_Eligible_To_Accrue_Period_SD
) THEN
(
  E = GET_PERIOD_DATES(Actual_Accrual_Start_Date
                      ,Accruing_Frequency
                      ,Beginning_Of_Calculation_Year
                      ,Accruing_Multiplier)
  Accrual_Start_Period_SD = GET_DATE('PERIOD_START_DATE')
  Accrual_Start_Period_ED = GET_DATE('PERIOD_END_DATE')
/*-----
--
If the Actual Accrual Period is after the Calculation Period the
n
end the processing.
----- *
/

IF (Accrual_Start_Period_SD > Calculation_period_ED) THEN
(
  Total_Accrued_PTO = 0
  E = PUT_MESSAGE('HR_52797_PTO_FML_ACT_ACCRUAL')
)
)
ELSE IF (First_Eligible_To_Accrue_Period_SD > First_Period_SD) THE
N
(
  Accrual_Start_Period_SD = First_Eligible_To_Accrue_Period_SD
  Accrual_Start_Period_ED = First_Eligible_To_Accrue_Period_ED
)
ELSE
(
  Accrual_Start_Period_SD = First_Period_SD
  Accrual_Start_Period_ED = First_Period_ED
)

/*-----

```

```

-----
Retrieve sickness information for previous employment
-----
*/

Previous_employment = 'N'
Prev_Sickness_Leave = 0

IF TO_CHAR(ACP_SERVICE_START_DATE,'yyyy') = TO_CHAR
  (Calculation_Date,'yyyy') THEN
  (
    Prev_Sickness_Leave = HU_ABS_GET_PREV_EMP_SICKNESS_LEAVE
                        (TO_CHAR(Calculation_Date,'yyyy')
                        ,Previous_employment)
  )
Accrued_PTO = 0

/* -----
-----
Now set up the information that will be used in when looping
through the periods
-----
- */

IF Last_period_ED >= Accrual_Start_Period_ED THEN
  (
    E = SET_DATE('PERIOD_SD',Accrual_Start_Period_SD)
    E = SET_DATE('PERIOD_ED',Accrual_Start_Period_ED)
    E = SET_DATE('LAST_PERIOD_SD',Calculation_period_SD)
    E = SET_DATE('LAST_PERIOD_ED',Calculation_period_ED)
    E = SET_NUMBER('TOTAL_ACCRUED_PTO',Accrued_PTO)
    E = LOOP_CONTROL('HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL')
    Total_Accrued_PTO = ROUND(GET_NUMBER('TOTAL_ACCRUED_PTO'))
    IF Previous_employment = 'Y' AND Total_Accrued_PTO >
      15 - Prev_Sickness_Leave THEN
      (
        Total_Accrued_PTO = 15 - Prev_Sickness_Leave
        E = SET_NUMBER('TOTAL_ACCRUED_PTO',Total_Accrued_PTO)
      )
    )

IF Accrual_Start_Period_SD <= Calculation_period_ED THEN
  (
    Accrual_end_date = Calculation_period_ED
  )

Effective_Start_Date = Accrual_Start_Period_SD
Effective_End_Date = Calculation_period_ED
IF Effective_Start_Date >= Effective_End_Date THEN
  (
    Effective_Start_Date = Effective_End_Date
  )

RETURN Total_Accrued_PTO, Effective_start_date
      , Effective_end_date, Accrual_end_date

```

Looping formula

```
/* -----
----
NAME : HU_SICKNESS_HOLIDAY_PERIOD_ACCRUAL
This formula calculates the amount of PTO accrued for a particular
period
-----
--*/

/*-----
----
    Get the global variable to be used in this formula
-----
--*/

DEFAULT FOR ACP_TERMINATION_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR EMP_HIRE_DATE IS '4712/12/31 00:00:00' (DATE)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (DATE)
Continuous_Service_Date = GET_DATE('CONTINUOUS_SERVICE_DATE')
Total_Accrued_PTO = GET_NUMBER('TOTAL_ACCRUED_PTO')
Period_SD = GET_DATE('PERIOD_SD')
Period_ED = GET_DATE('PERIOD_ED')
Last_Period_SD = GET_DATE('LAST_PERIOD_SD')
Last_Period_ED = GET_DATE('LAST_PERIOD_ED')

/* -----
----
Set the payroll period, accruing frequency, and accruing multiplier
based on the payroll.
-----*
/

Accruing_Frequency = GET_TEXT('ACCRUING_FREQUENCY')
Accruing_Multiplier = GET_NUMBER('ACCRUING_MULTIPLIER')
Beginning_of_Calculation_Year =
    GET_DATE('BEGINNING_OF_CALCULATION_YEAR
')

Period_Accrued_PTO = 0
IF ACP_SERVICE_START_DATE >= Period_SD
    AND ACP_SERVICE_START_DATE <= Period_ED
    AND ACP_TERMINATION_DATE >= Period_SD
    AND ACP_TERMINATION_DATE <= Period_ED THEN
(
    Days_valid = HU_ABS_GET_WORKING_DAYS(ACP_SERVICE_START_DATE
    ,ACP_TERMINATION_DATE)
)
ELSE IF ACP_SERVICE_START_DATE >= Period_SD AND
    ACP_SERVICE_START_DATE <= Period_ED THEN
(
    Days_valid = HU_ABS_GET_WORKING_DAYS(ACP_SERVICE_START_DATE
    , Period_ED)
)
ELSE IF ACP_TERMINATION_DATE >= Period_SD AND
    ACP_TERMINATION_DATE <= Period_ED THEN
```

```

(
  Days_valid = HU_ABS_GET_WORKING_DAYS(Period_SD
                                     , ACP_TERMINATION_DATE)
)
ELSE
(
  Days_valid = HU_ABS_GET_WORKING_DAYS(Period_SD,Period_ED)
)

/* -----
----
Calculate the Amount Accrued this Period
-----*
/
Period_Accrued_PTO = 15 * (Days_valid/260)

/*-----
----
Calculate any absence or bought/sold time etc. to be accounted for
in
this period.
-----
--*/
Absence = GET_ABSENCE(Period_ED, Beginning_of_Calculation_Year)
CarryOver = GET_CARRY_OVER(Period_ED, Beginning_of_Calculation_Year)
Other = GET_OTHER_NET_CONTRIBUTION(Period_ED
                                   ,Beginning_of_Calculation_Year)
Period_Others = CarryOver + Other - Absence

/*-----
----
Set the Running Total
-----
*/

E = SET_NUMBER('TOTAL_ACCRUED_PTO'
              ,Total_Accrued_PTO + Period_Accrued_PTO)

/* -----
----
Establish whether the current period is the last one, if so end
the processing, otherwise get the next period
-----*
/

IF Period_SD = Last_Period_SD THEN
(
  Continue_Processing_Flag = 'N'
)
ELSE
(
  E = GET_PERIOD_DATES(ADD_DAYS(Period_ED,1)
                      ,Accruing_Frequency
                      ,Beginning_of_Calculation_Year
                      ,Accruing_Multiplier)
  E = SET_DATE('PERIOD_SD', GET_DATE('PERIOD_START_DATE'))
  E = SET_DATE('PERIOD_ED', GET_DATE('PERIOD_END_DATE'))

```

```
        Continue_Processing_Flag = 'Y'  
    )  
  
    RETURN Continue_Processing_Flag
```

Sample Formula for Carry Over Absence (Hungary)

Oracle HRMS provides the HU_ABS_CARRYOVER_FORMULA to calculate their unused Base Holiday, Additional Holiday for bringing up children, and Other Additional Holiday except Sickness Holiday. Employees can carry over these holidays up to 30th June of the following year or, if the collective agreement permits, up to 31st December of the following year. The formula considers 30th June as the carry over expiry date.

You can use the sample formula HU_ABS_CARRYOVER_FORMULA to calculate the above entitlements. The sample formula is given below:

```

/*=====
=====
Formula Title : HU_ABS_HOLIDAY_CARRY_OVER
Description   : This Formula carries over the holidays remaining t
o
                next period.
=====
*/
DEFAULT FOR ACP_CONTINUOUS_SERVICE_DATE IS '4712/12/31 00:00:00' (
date)
DEFAULT FOR ACP_SERVICE_START_DATE IS '4712/12/31 00:00:00' (date)

INPUTS ARE  Calculation_Date (date)
            ,Accrual_Term    (text)

IF  ACP_CONTINUOUS_SERVICE_DATE WAS DEFAULTED THEN
(
  Continuous_Service_Date = ACP_SERVICE_START_DATE
)
ELSE
(
  Continuous_Service_Date = ACP_CONTINUOUS_SERVICE_DATE
)
calculation_period_end_date =
    TO_DATE('3112' || TO_CHAR(Calculation_Date,'YYYY'),'DDMMYY
YY')

IF  Accrual_Term = 'PREVIOUS' THEN
(
  Effective_Date = ADD_YEARS(calculation_period_end_date, -1)
)
ELSE
(
  Effective_Date = calculation_period_end_date
)

Expiry_Date = ADD_MONTHS(effective_date, 6)
Years_service = FLOOR(MONTHS_BETWEEN(ADD_DAYS(Effective_date,1)
    , Continuous_Service_Date) / 1
2)

IF  (GET_ACCRUAL_BAND(Years_service) = 0) THEN
(
  Max_carryover = GET_NUMBER('MAX_CARRY_OVER')
)
ELSE
  Max_carryover = 30

Process = 'YES'

RETURN Max_Carryover, Effective_date, Expiry_Date, Process

```

Registering a Function

You register a new function by naming and defining it, then creating contexts and parameters for it. Contexts are environment values that do not get passed to the function.

Where a function requires a mixture of contexts (from the FF_CONTEXTS table) and parameters, the contexts should be listed first in the function header followed by the function parameters. Only the function parameters, however, need to be used to call the function from FastFormula.

For example, a function requires eight values: three contexts and five parameters. All eight values are listed in the function header but only the five parameters are used to call the function.

You register the class of the function as external. External functions are further PL/SQL functions in addition to the ones already delivered with FastFormula. External functions can use contexts and parameters.

To register a new function for Oracle FastFormula:

1. Enter a unique name for the new function.
2. Select date, number or text as its data type.
3. Select external as the class of the function.
4. Enter an alias for the function name if you require an alternative name for it. You can also enter a description to explain what the function is for. The Alias and Description fields are both optional.
5. Enter the definition of the function. Use the format: <package name>.<function name>.
6. Save your entries.

To enter context usage and parameter information:

1. Choose the Context Usages button.
2. In the Context Usages window, select as many context items as you require for the function. The data type for each context displays automatically.

Note: The functionality that calls FastFormula, that is, QuickPaint or Payroll Processing, determines what contexts FastFormula has access to from the FF_CONTEXTS table.

3. Save your entries. The sequence number of each context is entered automatically when you do this.
4. Close the Context Usages window and choose the Parameters button.
5. In the Parameters window, enter the parameters, or operands, you require to define the function. Type and class display automatically.
6. Check the Optional check box if you want the corresponding parameter to be optional.
7. Check the Continuing check box if you want the function to make more than one call to the parameter.

Note: You cannot define a parameter as continuing unless you also make it optional. However, an optional parameter does not have to be continuing.

8. Save your entries.

Defining Global Values

Use global values to store information that does not change often, but you refer to frequently, as for example Company Name, or company-wide percentages used in the calculation of certain bonuses. You can use global values as variables in formulas by simply referring to the global value by name.

You can never change a global value using a formula. You change global values in the Globals window. Global values are date tracked so you can make date effective changes ahead of time.

Global values are available to all formulas within a Business Group.

To define a global value:

1. Set your effective date to the date when you want to begin using the global value.
2. Enter a name, data type (number, text, or date), and value. You can also enter a description.

Bulk Compiling Formulas

Where a formula has more than one version, you can compile all the versions in one process using the Bulk Compile Formulas process. For example, you run this process when you upgrade your legislative information, which contains formulas. The Bulk Compile Formulas process automatically generates the Formula Wrapper.

To bulk compile formulas:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Bulk Compile Formulas and submit your request.

You can define when you want to run this process using the schedule options.

Note: If you make any changes to a function after you have compiled a formula that uses it, you need to recompile the formula for the changes to take effect.

Generating the Formula Wrapper

To get the best performance for executing formulas from PLSQL you need to generate the Formula Wrapper. The Bulk Compile Formulas process automatically generates the Formula Wrapper.

Note: You do not need to generate the Formula Wrapper to test a formula.

To generate the Formula Wrapper:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select Generate Formula Wrapper and submit your request.

You can define when you want to run this process using the schedule options.

Writing or Editing a Formula

Use the Formula window to write and edit formulas.

Note: You cannot create formulas that exceed 64K in the Formula window. You must split longer formulas into two.

To write or edit a formula:

1. Set your effective date to the date when you want to begin using the formula.
2. To write a new formula, enter the formula's name and select a type. To edit an existing formula, query its name.
3. Choose the Edit button to open a blank Edit Formula window where you can write a new formula, or modify an existing one.
4. If you want to select database items, choose the Show Items button to display the Database Items window and run a query. Copy and paste items from this window to the Edit Formula window.
5. When you finish writing or editing the formula, choose the Verify button to compile it.

This process identifies any syntax errors in your formula.

Note: Once you have compiled any formula, new functions or changes to existing functions made after the first time you compile, are not used. You must logout of Oracle HRMS and login again. You can now compile your formula and the new functions and/or changes to existing functions will be included.

6. When the formula is verified successfully, save it.
7. Your next step depends on the type of formula:
 - If the formula is of type Oracle Payroll, you must associate it with an element in the Formula Result Rules window.
 - If the formula is of type Element Skip, you select it in the Skip Rule field of the Element window.
 - If the formula is of type Element Input Validation, you select it in the Formula field of the Input Values window when you are defining an element.
 - If the formula is of type User Table Validation, you select it in the Formula field of the Columns window when you are defining a user table structure.
 - If the formula is of type Accrual, Accrual Carryover, or Accrual Ineligibility, you select it in the Accrual Plan window.
 - If the formula is of type Accrual Subformula, you call it from another formula of type Accrual.
 - If the formula is used for benefits administration, you select the formula in the Rules field of the appropriate benefits window.

Test your formula in the situation you intend to use it (such as, in a test payroll run) to ensure it contains no logical errors.

Writing Payroll Formulas for Elements

If you have defined your own payroll elements, you can write formulas to calculate earnings and deductions.

For guidance on writing efficient payroll calculation formulas, see: *Formula Writing Techniques*, page 1-12. For important information about using element input values in payroll formulas, see: *Input Values in Payroll Formulas*, page 1-19.

To define elements and their formulas:

1. Design your element and how it will be calculated.
2. Write any formulas required to validate input values (formula type = Element Input Validation).
3. Write a formula, if required, to define the rules for skipping the element during payroll processing (formula type = Element Skip).
4. Define the element, referencing any formulas written in steps 2, page 1-229 and 3, page 1-229.
5. Write the formula or formulas for calculating the run results (formula type = Oracle Payroll).
6. Associate each Oracle Payroll type formula with the element in the Formula Result Rules window, and specify what happens to the formula results for this element.

Note: You can associate several formulas with a single element, each one for use with a different employee assignment status. You can also use the same formula for more than one element. In this case, if the formula references pay or input values (through the Inputs statement), each element must have pay and input values with the same names.

Writing Formulas for Accrual Plans

Each accrual plan needs to be associated with two formulas: an accrual formula to calculate gross PTO entitlement to date and a Carry Over formula to be called by the carry over process at the end of the accrual term.

You can also associate a third formula to be called by BEE (Batch Element Entry) validation for entries to the absence element associated with the accrual plan. This Ineligibility formula checks whether an assignment is eligible to use accrued PTO. It must calculate the end of the ineligibility period in the same way as the Accrual formula for the plan. This formula is not required if you enter the ineligibility period for a plan in the Accrual Plan window.

Some formulas are seeded, see *Seeded Accrual Type Formulas*, *Oracle Time & Labor Implementation and User Guide*. You can use these as supplied, edit them, or write your own formulas to provide the plan rules you require.

This topic explains:

- The formula types for formulas associated with accrual plans
- The required inputs and outputs for Accrual, Carry Over, and Ineligibility formulas
- Checks you must include in your Accrual formulas to avoid errors

For a sample Accrual formula and suggestions on how to change it to incorporate a whole range of plan rules, see: Sample Accrual Formula, page 1-108.

Formula Types

There are a number of formula types for formulas associated with accrual plans. You must define your formulas as the appropriate types or they will not be available for selection in the Accrual Plan window.

| Formula Type | Displays on list of values for . . . | Use for . . . |
|-----------------------|--------------------------------------|--|
| Accrual | Accrual Formula field | The top level formula that calculates PTO entitlement for a plan |
| Accrual Subformula | -- | Any formulas called by the top level formula, such as formulas for calculating the entitlement per period. |
| Accrual Carryover | Carryover Formula field | The formula to be called by the Carry Over process. |
| Accrual Ineligibility | Ineligibility Formula field | The formula to be called by BEE (if required) to specify whether an assignment is eligible to use accrued PTO. |

Required Inputs and Outputs

If you write your own formulas for accrual plans, you **must** use the following INPUTS and RETURN statements. **Do not add extra lines to these statements.** You can use functions or database items to get extra inputs. The following values are available as contexts for all the accrual formula types (and therefore you do not need to retrieve them as inputs or database items):

- ASSIGNMENT_ID
- DATE_EARNED
- ACCRUAL_PLAN_ID
- BUSINESS_GROUP_ID
- PAYROLL_ID

Some formula functions have been defined specially for Accrual type formulas. They require some or all of these contexts and they return values need for the accrual calculation, such as total absences, accrual band, and period dates. See: Functions for Accrual Type Formulas, page 1-39. You can define and register any other functions you require.

Inputs and Outputs for Accrual Formulas

INPUTS ARE

`Calculation_Date (date)`

ACCRUAL_START_DATE (date)

ACCRUAL_LATEST_BALANCE

/* Formula body */

RETURN total_accrued_pto, effective_start_date, effective_end_date, accrual_end_date

| Input | Description |
|------------------------|---|
| Calculation_Date | The date up to which accrual will be calculated |
| Accrual_Start_Date | The date to begin calculating accrual. If null, accruals are calculated from beginning of the accrual term. |
| Accrual_Latest_Balance | The latest balance for the accrual term up to the day before Accrual_Start_Date. The latest balance is held in a payroll balance. |

Note: The Accrual_Start_Date and Accrual_Latest_Balance inputs are required only if your accrual plan uses a payroll balance to store gross accruals.

| Output | Description |
|----------------------|---|
| total_accrued_pto | Gross accrued PTO this term |
| effective_start_date | Start date of accrual, which is normally the start of this accrual term, but may be plan enrollment date, hire date, adjusted service date, or other, depending on plan rules. |
| effective_end_date | Normally the calculation date, but should be the termination date if the employee has been terminated, or the end date of the plan element entry if the employee has left the plan. |
| accrual_end_date | This is an optional output. In the seeded formulas it is the end of the last full accrual period before the calculation date (because these formulas do not take account of partial accrual periods). |

Inputs and Outputs for Carry Over Formula

INPUTS ARE

calculation_date (date),

accrual_term (text)

/* formula body */

RETURN max_carryover, effective_date, expiry_date, process

| Input | Description |
|------------------|---|
| calculation_date | Any date falling within an accrual term |
| accrual_term | 'PREVIOUS' or 'CURRENT' indicating whether to return the last date of the accrual term spanning calculation_date, or the accrual term previous to that spanning calculation date. |

| Output | Description |
|----------------|--|
| max_carryover | Maximum amount the employee can carry over, which may be dependent on an accrual band. |
| effective_date | The last date of an accrual term (either current or previous, as determined by the input). For example, this would be 31-DEC-YYYY for an accrual plan based on calendar years. |
| expiry_date | The date by which employees must use carried over PTO, otherwise they lose it. This output is optional. |
| process | Set to Yes by default. This means that the max_carryover amount is returned. If you set it to No, max_carryover is set to Null by the Carry Over process |

Inputs and Outputs for Ineligibility Formula

INPUTS ARE

calculation_date (date),

/* formula body */

RETURN assignment_eligible

| Input | Description |
|------------------|--|
| calculation_date | The effective date of the element entry. |

| Output | Description |
|---------------------|--|
| assignment_eligible | 'Y' or 'N'. If Y, BEE creates the entry to the absence element (assuming all other validation is successful). If N, BEE creates a warning on the batch line for the absence entry. |

Checks You Must Include In Your Accrual Formulas

You may notice that the seeded formulas contain statements to check a number of dates to see whether an employee is eligible to accrue any PTO. Be sure to include these checks in your formulas too.

Termination Date

Check whether there is a termination date for the assignment. If the termination date is before the calculation date, calculate accrual as of the termination date. If your formula does not handle partial accrual periods, check whether the termination date is before the end of the first accrual period; if yes, set gross accrual to zero.

Enrollment End Date

Check whether there is an end date for the assignment's enrollment in the plan. If the end date is before the calculation date, calculate accrual as of the end date. If your formula does not handle partial accrual periods, check whether the end date is before the end of the first accrual period; if yes, set gross accrual to zero.

Calculation Date

If the calculation date is before the end of the first accrual period, set gross accrual to zero (unless your formula handles partial accrual periods).

Hire Date

Check the employee's hire date or continuous service date. If your formula handles partial accrual periods, check that this date is before the calculation date, and if not, set the gross accrual to zero. If your formula does not handle partial periods, check that this date is before the start of the last full accrual period used in the current calculation. If the employee has not worked for a full accrual period before the calculation date, set the gross accrual to zero.

Start Date for New Plan Participants

Check when the employee should start to accrue time. This is typically the date of enrollment in the plan or (if your formula does not handle partial accrual periods) the first period starting on or after the date of enrollment in the plan. If this date (or period) is after the calculation date (or period), set the accrual to zero.

Note: The seeded and sample formulas also show how to incorporate other start dates in your plan, such as six months after hire date, or start of calendar year after hire date.

Ineligibility Period

Check any ineligibility period (which is a time when a new participant accrues time but cannot use it, so it does not appear credited to him or her until the end of the period). If the eligibility period is still in force at the calculation date (or, if your formula does not handle partial accrual periods, on the end date of the last accrual period used in the calculation) set the gross accrual to zero.

Inactive Assignment

Check whether the employee's assignment has been active throughout the period for which you are calculating accruals. Depending on your plan rules, your employees might not accrue time when their assignments are inactive, or they might accrue time at a reduced rate. You can use the function `GET_ASG_INACTIVE_DAYS` to check the assignment status on each day from period start date to period end date and return the number of inactive working days.

1.

Writing Formulas To Calculate Absence Duration

You can write a formula to calculate absence duration automatically when a user enters an absence start and end date, or time. Your localization team may have written a formula, which the system will use by default. However, if you need a configured formula to take account of special work hours or shift patterns, you can create a new formula that will override the supplied one. You can create one formula for each Business Group.

Your formula must be called: `BG_ABSENCE_DURATION`. You must select the formula type QuickPaint.

The formula inputs must be:

- `days_or_hours` (units for the duration: D or H)
- `time_start`, `time_end`
- `date_start`, `date_end`

The formula outputs must be:

- `duration` (the calculated value or FAILED)
- `invalid_msg` (optional - an error message name)

Use the supplied example formula (`TEMPLATE_ABSENCE_DURATION`) as the basis for your formulas.

1.

Writing Formulas for Element Skip Rules

If your payroll policies require conditional processing of an element, you can write a formula to define when the run should process the element and when it should skip it. For example, your formula could specify:

- process the Union Fees element every run unless the Union_Fees_Paid balance is greater than 10 000.

Your skip rule formula must be consistent with other processing rules defined for the element, such as frequency rules, which determine in which period the element is normally processed. Notice that a skip rule cannot contravene any other processing rules in place for the element.

You can associate only one element skip rule formula with each element. You must write and validate the formula before you define the element so that you can select the formula from a list on the Element window.

To write a formula defining a skip rule:

1. Select formula type Element Skip in the Formulas window.
2. Use as many input values as you require. The formula must set and return a local variable of type text, and this variable must be called skip_flag.

If the returned value of this variable begins with the letter y (such as 'Yes'), all processing for the element is skipped. Otherwise the element processes as normal.

The following example of a skip rule formula defines that the Union Fees element is not processed if the Union_Fees_Paid balance is greater than 10 000:

```
IF Union_Fees_Paid > 10000
```

```
THEN
```

```
skip_flag = 'yes'
```

```
ELSE
```

```
skip_flag = 'no'
```

```
RETURN skip_flag
```

Copying and Adding Features to a QuickPaint Formula

When you save a QuickPaint Report definition, a formula is generated automatically. Formulas generated from QuickPaint do not include conditional logic or calculations. You may want to add these features, for example to sum up compensation elements or to report different data for different assignments.

Important: If you want to add features to a generated QuickPaint formula, you must copy the formula and edit the copy. If you edit the original, your edits will be overwritten if the formula is regenerated from the QuickPaint definition.

To make a copy of a QuickPaint formula:

1. In the Formula window, query your QuickPaint formula. It has the same name as your QuickPaint report.
2. Choose the Edit button. Select and copy the formula in the Edit Formula window.
3. Choose New Record from the Edit menu.
4. Enter a name for your edited copy and select the type QuickPaint.
5. Paste the text of the QuickPaint formula into the Edit Formula window.
6. Save your work.

Writing Formulas for Validation

You can use Oracle FastFormula to validate user entries into the element input values, and to user tables that you define.

To write a formula for validation purposes:

1. Write and validate the formula.

You must do this before you define the element or table, so that you can select the formula from a list in the Element window or Columns window.

2. Define the element or table.
3. Select formula type Element Input Validation or User Table Validation in the Formulas window.

Rules to Observe

- There must be one input value, of type text, and it must be called entry_value.
- The formula must set and return a local variable giving the status of the validation (success or error). This variable must be called formula_status and have the value 's' (success) or 'e' (error).
- Optionally, the formula can also return a text variable giving an explanatory message. The returned message variable must be called formula_message and can contain any text. It can be returned with both successful and unsuccessful statuses.
- The formula must not return any other results.

For an element input value validation formula, you must also observe the following rules:

- You cannot use the element's other pay and input values in the formula.
- You cannot return a value to another pay or input value.

All entry values are stored in the database as text items. Therefore, if you want to validate an entry value as a date or number, you must use Oracle FastFormula's

conversion function to convert the text into a date or number type variable. For example:

```
TO_NUM (entry_value)
```

```
TO_DATE(entry_value, 'DD-MON-YYYY')
```

Writing Formulas to Calculate Eligibility for a Collective Agreement Entitlement

You can write a formula to be used to calculate whether a person is eligible to receive a collective agreement entitlement. This can be used when defining an eligibility profile to be used in conjunction with a collective agreement, instead of selecting criteria elements. You select the formula as a rule when defining the eligibility profile.

Your formula name can be whatever you like. You must select the formula type CAGR.

There are no formula inputs for this formula type.

The formula outputs depend on the category of the entitlement with which this formula is to be used. If the category is Absence, Payroll, or Assignment, then the output values are:

- Value
- Range From
- Range To

If the category is Pay Scale, then the output values are

- Parent_Spine_ID
- Step_ID
- From_Step_ID
- To_Step_ID
- Grade_Spine_ID

The contexts for this formula type are:

- BUSINESS_GROUP_ID
- PAYROLL_ID
- ASSIGNMENT_ID
- DATE_EARNED
- ORGANIZATION_ID
- TAX_UNIT_ID
- PERSON_ID

Use the supplied example formulas HR_CAGR_TEMPLATE (for Absence, Payroll, or Assignment categories) and HR_CAGR_PYS_TEMPLATE (for Pay Scale categories) as the basis for your formulas.

1.

Editing Assignment Set Formulas

Assignment set formulas do not normally need to be edited. If, however, you enter multiple criteria to define an assignment set, with conditions joined by AND or OR, you may want to edit the formula to change the brackets in the generated conditions. This changes the order in which the conditions are tested.

To view an assignment set formula, query it in the Formula window. The formula type is Assignment Set and the formula name is the same as the assignment set name. To edit an assignment set formula, make a copy, as for a QuickPaint formula.

1.

Writing Formulas for Default Assignment Costing

You can write a formula to specify the cost allocation key flexfields and their proportions that you use for default assignment costing.

Note: As a prerequisite, you must set the profile option HR: Default Assignment Costing to Yes.

To write a formula for default assignment costing:

1. Open the Formula window.
2. Required: enter the formula name exactly as below:
 - PER_DFLT_ASG_COST_ALLOCATION
3. Select a formula Type of Element Input Validation.
4. Enter a Description of the formula.
5. Choose the Edit button.
6. Write the formula. Oracle HRMS provides the following inputs:
 - assignment_id (number)
 - business_group_id (number)
 - position_id (number)
 - effective_date (date)

Note: Because no context is set, do not use FastFormula Database Items. Instead, use functions for complex formulas.

Use the sample code below as a guideline in writing your own formula.

```
USE_FORMULA = 'Y'
```

```
COST_ALLOCATION_KEYFLEX_ID1 = 101
```

```

COST_ALLOCATION_KEYFLEX_ID2 = 102

COST_ALLOCATION_KEYFLEX_ID3 = 103

PROPORTION1 = .5

PROPORTION2 = .3

PROPORTION3 = .2

RETURN USE_FORMULA,

COST_ALLOCATION_KEYFLEX_ID1, PROPORTION1,

COST_ALLOCATION_KEYFLEX_ID2, PROPORTION2,

COST_ALLOCATION_KEYFLEX_ID3, PROPORTION3

```

If the application does not return a value for USE_FORMULA; or, if the value for USE_FORMULA is not equal to 'Y', the default assignment costing will not use the accounts and proportions returned by the formula. Instead, default assignment costing will be calculated based on the position control budget for the business group, if one has been defined.

If USE_FORMULA = 'Y', the application creates the default assignment costing with the cost allocation flexfield id (COST_ALLOCATION_KEYFLEX_ID%) and the related proportion (PROPORTION%).

- If the COST_ALLOCATION_KEYFLEX_ID% does not contain a valid cost allocation id for the business group, then that entry will be ignored.
- If the PROPORTION% is greater than 1, it will be treated as 1.
- If the PROPORTION% is less than 0, the entry will be ignored.

Writing Formulas for Templates

There are several ways you can use formulas to configure the people management templates:

- A Template Validation formula can check values entered in a field.
- A Template Information formula can specify information to be displayed from the right mouse menu when a user right-clicks in a field.
- A People Management Message formula can return a text string to display in the Assignment field on the Maintenance window and in the Data Organizer.
- A People Management Message formula can return message tokens that you can use in a notification message issued from template forms.

Template Validation Formulas

If you use a formula to validate user entries in template fields, you must observe the following rules:

- Select the formula type Template Validation in the Formulas window.
- There can be up to five inputs, and they must be called item1, item2, item3, item4, and item5.
- The formula can return up to three outputs, which must be named as follows:
 - Status, which must have the value 's' if the validation was successful. Any other value is interpreted as an error.
 - Message, which is a text variable. The formula can return a message with validation statuses of success, failure, or both.
 - Item, which is the new value of the field that is being validated.

After creating the formula, you select it in the Validation Formula property for the field when you are setting up the template in the People Management Configurator. You can also enter up to five parameters to be passed to the formula, including the value you are validating. For example, you might enter the name of another field on the template if you want the formula to cross-validate the value in one field against another.

Example

Here is a formula that validates the entry in the Organization field on the Maintenance window. It raises an error if the entry is not Corporate Finance.

```
/* Updateable Values Section */

/* Defaults Section */

/* Inputs Section */

INPUTS ARE item1 (text)

/* Main Body of Formula */

organization_name = item1

status = 's'

message = ' '

IF organization_name <> 'Corporate Finance' THEN

(
```

```

message = 'Organization must be Corporate Finance'

    status = 'f'

)

RETURN message, status

```

When you are setting up the template in the People Management Configurator, select the Organization (Maintain) item. Select the name of your formula as the Validation Formula property and select Organization (Maintain) as the Validation Formula Parameter 1 property. This passes and validates the value the user enters, not any codes or table identifiers to which it may be related.

Template Information Formulas

If you write a formula to return additional information for a field, you must observe the following rules:

- Select the formula type Template Information in the Formulas window.
- There can be up to five inputs, and they must be called item1, item2, item3, item4, and item5.
- The formula can return one text output, which must be called Message. This is the information that is displayed when the user right clicks in the field and selects a prompt that you define in the right mouse menu.

After creating the formula, you select it in the Information Formula property for the field when you are setting up the template in the People Management Configurator. You can also enter up to five parameters to be passed to the formula. For example, if you were specifying an information formula for the job field, you might enter the name of the organization field so that the formula can return different additional job information depending on the organization.

Example

Here is a formula that returns contact information to be displayed from the Supervisor field.

```

/* Updateable Values Section */

/* Defaults Section */

DEFAULT FOR sup_work_phone IS ' '

DEFAULT FOR sup_email_address IS ' '

/* Inputs Section */

```

```

/* Main Body of Formula */

message = 'Supervisor Contact Details||CHR(10)||'Telephone:

' || sup_work_phone || CHR(10) || 'Email: ' || sup_email_address

RETURN message

```

People Management Message Formula for Assignment Field

Applicant and employee assignments are listed by name in the Data Organizer in the template Summary window and in the Assignment field on the Maintenance window. Since assignments do not have names, you can choose what assignment information is displayed as a name to help your users select the assignments they want to work with.

By default, assignments are identified as <job>.<organization>, such as Senior Manager.Engineering. However, you can choose any other database items to display.

If you want to override the default, write a formula (of type People Management Message) called ASSIGNMENT_NAME. This formula must return a text string. If there is no formula called ASSIGNMENT_NAME on the database, the system uses the predefined formula QH_ASSIGNMENT_NAME.

The QH_ASSIGNMENT_NAME formula is as follows:

```

/* Updateable Values Section */

/* Defaults Section */

DEFAULT FOR asg_job IS ' '

DEFAULT FOR asg_org IS ' '

/* Inputs Section */

/* Main Body of Formula */

assignment_name = asg_job||'.' || asg_org

RETURN assignment_name

```

People Management Message Formulas for Message Tokens

If you write a formula to return message tokens, you must observe the following rules:

- Select the formula type People Management Message in the Formulas window.
- The formula must have the same name as the notification message that will use the tokens.
- The formula can return up to five text outputs, which must be named FF1, FF2, FF3, FF4 and FF5.

Example

Suppose you want to include an employee's preferred name in a New Hire notification. The New Hire notification is called NEW_STARTER, so you create a formula of the same name that returns this name in the variable FF1:

```
/* Updateable Values Section */

/* Defaults Section */

DEFAULT FOR per_known_as IS ' '

/* Inputs Section */

/* Main Body of Formula */

FF1 = per_known_as

RETURN FF1
```

Then you edit the New Hire notification to include the FF1 variable. For example:

Please note, that we have a new employee as of &HIRE_DATE.

They are &FULL_NAME (&EMPLOYEE_NUMBER).

Known as: &FF1.

Their new job details are:

Position: &POSITION

Job: &JOB

Organization: &ORGANIZATION

Location: &LOCATION

1.

Writing Proration Formulas

When the payroll run encounters an event (such as a grade change) that you have defined as a proration event for the element being processed, it creates two run results for the element--one for the payroll period up to the day before the event, and one from

the date of the event to the end of the period. You must define a formula to handle this proration processing for the element. There are two ways to do this:

- Edit the element's Oracle Payroll formula so that it can handle proration, or
- Create an additional formula to run after the Oracle Payroll formula only in periods when a proration event is encountered. You select this formula in the Proration Formula field on the Proration tab of the Element window.

Using a separate proration formula has the advantage that proration takes place even when you enter a pay value directly on the element entry. Embedding the proration calculation in the Oracle Payroll formula avoids the overhead of calling the second formula in periods when proration events occur.

If you want to write a proration formula, you must follow these rules:

- Select the formula type **Payroll Run Proration**.
- The formula inputs can be:
 - any of the element input values
 - prorate_start (DATE)
 - prorate_end (DATE)
- The formula outputs can be:
 - any of the element input values

Your localization team may have created example formulas that you can use as the basis for your own formulas.

1.

Writing Formulas for EEO Employment Categories

Use Oracle FastFormula to map your employment categories to the output values required for EEO4 and EEO5 reports. The EEO reports pick the list of employment categories from the formula.

Your formula must have the name PQH_EMPLOYMENT_CATEGORY, and the formula type must be Element Input Validation. If you want to use this formula, you must define it for each business group.

If you do not create a formula for employment categories, the default employment category list is used:

- FR - Full-time regulars
- FT - Full-time temps
- PR - Part-time regulars
- PT - Part-time temps

The formula output values are:

- Full_Time_Regulars
- Full_Time_Temps
- Part_Time_Regulars
- Part_Time_Temps

In the example below, employees with employment categories FR and FRD are treated as full-time regulars; those with employment categories FT, FTL, and FTJ are treated as full-time temporaries; those with PR are treated as as part-time regulars; and those with PT are treated as part-time temporaries.

```
/*Comma separated list of the employment categories with no spaces in between */
```

```
full_time_regulars = 'FR,FRD'
```

```
full_time_temps = 'FT,FTL,FTJ'
```

```
part_time_regulars = 'PR'
```

```
part_time_temps = 'PT'
```

```
RETURN full_time_regulars, full_time_temps, part_time_regulars, part_time_temps;
```

1.

Writing Formulas for Person Number Generation

When automatic local person numbering is in effect, Oracle HRMS allocates numbers for a person type (employees, contingent workers, or applicants) from a number sequence that is specific to the business group. When global person numbering is in effect, Oracle HRMS allocates numbers for a person type from a single global sequence across all business groups.

You can write a formula of type **Person Number Generation** to generate a *global* custom number sequence in place of the default local or global sequence. Once you have defined and validated a formula, Oracle HRMS executes the formula whenever automatic person numbering is active and a person number is required.

Formula Names and Parameters

The formula names for the Person Number Generation type are:

- EMP_NUMBER_GENERATION (for employee numbers)
- APL_NUMBER_GENERATION (for applicant numbers)
- CWK_NUMBER_GENERATION (for contingent worker numbers)

You can define only one formula for each person type.

Important: You must define person number generation formulas in the Setup business group, and they must have the names shown here. The formulas have no effect if you define them in any other business group or if you do not use the specified names.

The formula context value is Business Group ID.

The formula inputs are:

- Legislation code
- Person type
- Person number
- Party ID
- Person ID
- Date of birth
- Start date (which is the hire date for employees, the latest start date for applicants, and the placement start date for contingent workers)
- National identifier

The person number and person ID parameters are null when you create a new person record and nonnull when you update an existing person record. Although you cannot change a person number when you update a person record, Oracle HRMS checks that the number is valid. If the number is not valid (for example, if it is null), Oracle HRMS may execute the person number generation formula.

The formula outputs are:

- Next person number
- Completion message (for example, an error message)

The following general rules apply to person number formulas:

- Gaps in the number sequence are valid.
- Oracle HRMS checks that numbers from a custom sequence are unique in the business group.
- A custom number sequence applies to all business groups. However, you can write a formula that works differently in each business group.
- You can manage other business needs in the logic of the formula. For example, you may want employees to keep their employee numbers when they transfer to different business groups.

HR: Use Global Person Numbering Option

To use the default global person number sequence for a person type, you run the process "Change automatic person number generation to global sequencing," for the person type (Applicant, Contingent Worker, or Employee). This process sets the appropriate user profile option (HR: Use Global Applicant Numbering, HR: Use Global Contingent Worker Numbering, or HR: Use Global Employee Numbering) to Yes.

You do not need to run this process if you define a valid custom formula. The HR: Use Global Person Numbering options control the default global person number sequences only.

If you both define a valid formula for generating person numbers *and* run the process "Change automatic person number generation to global sequencing," Oracle HRMS writes this message to the log: "A valid custom formula for generating person numbers exists. The default global number sequence will not be used." However, if the custom formula becomes invalid or you delete it, Oracle HRMS switches to the default global

person number sequence because the profile option is set to Yes. Otherwise, Oracle HRMS switches to the default local sequence.

See Writing or Editing a Formula, page 1-228

1.

Windows and their Navigation Paths

This section lists the default navigation paths for all the windows in Oracle HRMS as they are supplied. You can use task flow windows directly from the menu, or from the People and Assignment windows.

The responsibility that you use determines which of these windows you can use and how you access them. Your system administrator sets up navigation menus and task flows for your responsibility. They may also create configured versions of some of these windows using different window titles.

AAP Organization (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an AAP Organization.
3. Choose the Others button and select AAP Organization.

Absence Attendance Type

1. Choose Total Compensation -> Basic -> Absence Types in the Navigator.

Absence Detail

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Others button and select Absence.

Or:

1. Choose Fastpath -> Absence in the Navigator.
2. In the resulting Find window, query the person.

Absence Tracking (Netherlands)

1. Choose People -> Absence Tracking in the Navigator.

Accommodation (France)

1. Choose People -> Accommodations in the Navigator.

Accrual Bands

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.
3. Choose the Accrual Bands button.

Accrual Plans

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.

Accruals

Do one of the following:

1. Choose View -> Employee Accruals in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Accruals button.

Or:

1. Choose Fastpath -> Accruals in the Navigator.
2. In the resulting Find window, query the person.

Action Parameters

1. Choose Processes and Reports -> Action Parameters in the Navigator.

Action Types

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Actions button.

Activity Rate

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.

Activity Variable Rates and Rules

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Variable Rates button.

Actual Premiums

1. Choose Total Compensation -> Rates/Coverage Definitions -> Actual Premiums in the Navigator.

Additional Absence Detail Information <Employee> (CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Select Absence.

Or:

1. Choose People -> Fastpath -> Absence Information in the Navigator.

Additional Information for German HR Organizations (Germany)

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Select German HR Organization.

Additional Information for German Tax Organizations (Germany)

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Place the cursor on the German Tax Office field.

Address

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Address button.

Or:

1. Choose Fastpath -> Address in the Navigator.
2. In the resulting Find window, query the person.

Adjust Balance (Payroll)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Assignment button.
4. Choose the Others button and select Adjust Balance.

Or:

1. Choose Fastpath -> Adjust Balances in the Navigator.
2. In the resulting Find window, query the person.

Advanced Criteria

1. Choose Benefits Extract -> Criteria Definition in the Navigator.
2. Query or enter a criteria definition and choose the Advanced tab.
3. Select a Criteria Type and choose the Details button.

Agency Appeals (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Agency Appeals taskflow button.

Agreement Grades

1. Choose Work Structures -> Collective Agreements -> Collective Agreement Grades in the Navigator.

Alien Data Window (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Choose the Alien Data button.

Alter Effective Date

1. Choose Tools -> Alter Effective Date from the Tools menu.

Alternative Dispute Resolution (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the ADR taskflow button.

Appeals (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Appeals taskflow button.

Applicant Entry

1. Choose Recruitment -> Applicant Quick Entry in the Navigator.

Applicant Interview

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.
4. Choose the Interview button.

Application

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select Application.

Or:

1. Choose Fastpath -> Application in the Navigator.
2. In the resulting Find window, query the person.

Application Utilities Lookups

1. Choose Other Definitions -> Application Utilities Lookups in the Navigator.
2. Enter or query a user-defined Type.

Appraisal Template

1. Choose Career Management -> Appraisal Template in the Navigator.

Apprenticeship Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.

Approvals: Grade / Step Progression

1. Choose Work Structures -> Grade -> Progression Approval.

Approved Requests for Personnel Action (FD)

1. Choose Request for Personnel Action -> Cancellation/Correction

ASSEDIC Information (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.

2. Enter or query an Establishment.
3. Choose the Others button and select ASSEDIC Information.

Assessment Template

1. Choose Career Management -> Assessment Template in the Navigator.

Assign Security Profiles

1. Choose Security -> Assign Security Profiles in the Navigator.

Assignment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.

Or:

1. Choose Fastpath -> Assignment in the Navigator.
2. In the resulting Find window, query the person.

Assignment Budget Values

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant or an employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Budgets button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Budget Values.

Or:

1. Choose Fastpath -> Assignment Budget in the Navigator.
2. In the resulting Find window, query the person.

Assignment Criteria

1. Choose Payroll -> Assignment Set in the Navigator.
2. Enter or query an assignment set.

3. Choose the Criteria button.

Assignment Folder

1. Choose View -> Lists -> Assignment Folder in the Navigator.

Assignment History

1. Choose View -> Histories -> Employee Assignment in the Navigator.

Assignment Processes

1. Choose View -> Payroll Process Results in the Navigator.
2. Enter or query a payroll process.
3. Choose the Assignment Process button.

Assignment Set

1. Choose Payroll -> Assignment Set in the Navigator.

Assignment Statuses

1. Choose Work Structures -> Status in the Navigator.

Aubry I Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Aubry I Rebate.

Aubry II Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Aubry II Rebate.

Australian Information (AU)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Australian Information tabbed region.

Authentication Activities (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Authentication Activities in the Navigator.

Award/One-Time Payment (FD)

1. Choose Request for Personnel Action -> Award/One-Time Payment

Awards and Decorations pages (France)

1. Choose People -> Awards and Decorations in the Navigator

Balance (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.

Balance Classifications (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Classifications button.

Balance Dimensions (Payroll)

1. Choose Total Compensation -> Basic -> Balance in the Navigator.
2. Enter or query a balance.
3. Choose the Dimensions button.

Balance Feed Control (Payroll)

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feed Control button.

Balance Feeds (Payroll)

Note: This instance of the Balance Feeds window lets you select more than one balance for the element to feed.

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Balance Feeds button.

Bargaining Unit (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Bargaining Unit.

Batch Assignment Entry

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Assignment Lines button.

Batch Header

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

Batch Lines

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Element Lines button.

Batch Process Parameters (Advanced Benefits)

1. Choose Processes and Reports -> Batch Process Parameters in the Navigator.

Batch Summary

1. Choose Mass Information eXchange: MIX -> BEE Summary in the Navigator.

Belgian Tax Information (Belgium)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.

Beneficiaries (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a beneficiary.
6. Choose the Others button and select Beneficiary.

Beneficiary Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.

3. Choose the Designations tab.
4. Choose the Beneficiary tab.
5. Choose the Certifications button.

Benefit Contributions (US, CA)

1. Choose Total Compensation -> Basic -> Benefit Contributions in the Navigator.

Benefits Assignment

1. Choose People -> Total Comp Participation -> Person Benefits Assignment in the Navigator.

Benefits Authentication Form (Advanced Benefits) (US, UK, CA)

1. Choose People -> Total Comp Contribution -> Benefits Authentication Form in the Navigator.

Benefits Balances

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Benefits Balances in the Navigator.

Benefits Group

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Benefits Group in the Navigator.

Benefits Pools (Advanced Benefits)

1. Choose Total Compensation -> Rate/Coverage Definitions -> Benefits Pools in the Navigator.

Benefits Service Center (Advanced Benefits)

1. Choose People -> Benefits Service Center in the Navigator.

Book Events

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Bookings.

Budget

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.

3. Select a budget version.
4. Choose the Open button.

Budget Characteristics

1. Choose Work Structures -> Budget -> Budget Characteristics in the Navigator.

Budget Details

Note: Follow these steps if you are entering a budget that is not routed for approval.

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.
3. Select a budget version.
4. Choose the Open button.
5. Select a line item in the budget and choose the Periods button.

Note: Follow these steps if you are routing a budget for approval through a hierarchy of approvers.

6. Choose Work Structures -> Budget -> Worksheet in the Navigator.
7. Define the properties of the worksheet.
8. Choose the Create Worksheet button.
9. Edit the worksheet by entering values for budget line items.
10. Choose the Periods button.

Budget Reallocation

1. Choose Work Structures -> Budget -> Budget Reallocation in the Navigator.

Budget Set

1. Choose Work Structures -> Budget -> Budget Set in the Navigator.

Budget Value Defaults

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Budget Value Defaults.

Budgetary Calendar

1. Choose Work Structures -> Budget -> Budget Calendar in the Navigator.

Budgets

1. Choose Work Structures -> Budget -> Budget Details in the Navigator.
2. In the resulting Find window, query the budget.

Business Group Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Business Group Information.

Cadre Life Insurance TA (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Cadre Life Insurance TA.

Calendar

1. Choose Customer and Supplier Maintenance -> Calendar in the Navigator.

Calendar (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.

Calendar Usages (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.
4. Choose the Calendar Usages button.

Career Path Names

1. Choose Work Structures -> Job -> Path Name in the Navigator.

Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.

5. Choose the Certifications button.

Chamber Contribution Information (Germany)

1. Choose Organization -> Define in the Navigator.
2. Choose the Others button.
3. Select German Chamber Tax.

Change Event Log

1. Choose Mass Information eXchange -> System Extract -> Change Event Log in the Navigator.

Change in Data Element (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Data Element.

Change in Duty Station (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Duty Station.

Change in FEGLI (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in FEGLI.

Change in Hours (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Hours.

Change in Retirement Plan (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Retirement Plan.

Change in SCD (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in SCD.

Change in Tenure (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Tenure.

Change in Veterans Preference (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Veterans Preference.

Change in Work Schedule (FD)

1. Choose Request for Personnel Action -> Change Actions -> Change in Work Schedule.

Change to Lower Grade (FD)

1. Choose Request for Personnel Action -> Salary Change -> Change to Lower Grade

Choose Set of Books

1. Choose Customer and Supplier Maintenance -> Choose Set of Books in the Navigator.

Cities (US, CA)

1. Choose Other Definitions -> Cities in the Navigator.

City Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.
6. Choose the Tax information button from the County Tax Rules <Employee> window.

Claims (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Claims taskflow button.

COBRA Benefits (Basic Benefits) (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Benefits button.

COBRA Coverage (Basic Benefits) (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.

4. Choose the Others button and select COBRA.

COBRA Payments (Basic Benefits) (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Payments button.

COBRA Statuses (Basic Benefits) (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select COBRA.
5. Enter or query a qualifying event.
6. Choose the Statuses button.

Collapse Life Events

1. Choose Total Compensation -> General Definitions ->Additional Setup -> Collapse Life Events in the Navigator.

Collective Agreements

1. Choose Work Structures -> Collective Agreements ->Define Collective Agreements in the Navigator.

Collective Agreement Entitlements

1. Choose Work Structures -> Collective Agreements ->Define Collective Agreements in the Navigator.
2. Query a collective agreement.
3. Choose the Entitlements button.

Collective Agreement Entitlement Items

1. Choose Work Structures -> Collective Agreements ->Define Entitlement Items in the Navigator.

Collective Agreement Grades (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.

2. Enter or query a constituency.
3. Choose the Others button and select Collective Agreement Grades.

Collective Agreement and Grade Progression Results

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Collective Agreement and Grade Progression Results.

Collective Agreement Retained Rights

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Review Retained Rights.

Columns

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Columns button.

Committees

1. Choose Work Structures -> Organization -> Maintain Committees in the Navigator

Communication Delivery Methods

1. Choose Fastpath -> Personal Delivery Method in the Navigator.

Communication Types

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.

Communication Type Children

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query a communication type kit.

3. Choose the View Children button.

Communication Type Delivery Methods

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Delivery button.

Communication Type Triggers

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Triggers button.

Communication Type Usages

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Communication Types in the Navigator.
2. Query or enter a communication type.
3. Choose the Usages button.

Competence Details

1. Choose Career Management -> Assessment Template in the Navigator.
2. Enter or query assessment details.
3. Choose the Competencies button.

Competence Profile

1. Choose People -> Enter and Maintain in the Navigator.
 2. Enter or query a person.
 3. Choose the Others button and select Competence Profile.
- Or:
1. Choose Fastpath -> Competence Profile in the Navigator.

Competence Qualifications

1. Choose Career Management -> Competencies in the Navigator.
2. Enter or query a unit standard competence.
3. Choose the Qualifications button.

Competence Requirements

1. Choose Career Management -> Competence Requirements in the Navigator.

Competence Types

1. Choose Career Management -> Competence Types in the Navigator.

Competencies

1. Choose Career Management -> Competencies in the Navigator.

Complaint People (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
2. Choose the Complaint People taskflow button.

Complaints(FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking

Complementary Pension Tranche 2 (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Complementary Pension Tranche 2.

Concurrent Requests (UK)

1. Choose Processes and Reports -> View Requests in the Navigator.

Configurable Business Rules

1. Choose Transaction Maintenance Forms -> Configurable Business Rules in the Navigator.

Consolidation Sets (Payroll)

1. Choose Payroll -> Consolidation in the Navigator.

Constituency Information (for a Representative Body)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a representative body.
3. Choose the Others button and select Constituency.

Construction Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Construction Tax Info.

Contact

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.

Or:

1. Choose Fastpath -> Contact in the Navigator.
2. In the resulting Find window, query the person.

Contexts

1. Choose Security -> Contexts in the Navigator.

Contract

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button.
4. Choose Contracts.

Or:

1. Choose Fastpath -> Contracts in the Navigator.
2. In the resulting Find window, query the person.

Contribution History (Def Comp 457) (US)

1. Choose View -> Histories -> Entries -> Contribution History

Control Totals

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Choose the Totals button.

Conversion Rate Types

1. Choose Payroll -> Conversion Rate Types in the Navigator.

Conversion to Appointment (FD)

1. Choose Request for Personnel Action -> Conversion to Appointment

Corps, Grades and Pay Scales (France)

1. Choose Total Compensation -> Programs and Plans -> Plan Design Wizard in the Navigator
2. Select the French Public Sector business area.

Corrective Actions (FD)

1. Choose Complaints Tracking -> EEO Complaints Tracking
 - Choose the Corrective Actions taskflow button.

Costing

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Costing.

Or:

1. Choose Fastpath -> Costing in the Navigator.
2. In the resulting Find window, query the person.

Costing Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Costing.

County Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Tax Information button.
4. Choose the Tax information button from the Federal Tax Rules <Employee> window.
5. Choose the Tax information button from the State Tax Rules <Employee> window.

Court Orders

1. Choose People -> Total Comp Enrollment -> Court Orders in the Navigator.

Coverage Across Plan Types

1. Choose Total Compensation -> Rates/Coverage Definitions -> Coverage Across Plan Types in the Navigator.

Coverage Calculations

1. Choose Total Compensation -> Rate/Coverage Definitions -> Coverage Calculations in the Navigator.

Covered Dependents (CA)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.

Covered Dependents (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Contact.
4. Choose the Entries button.
5. Select the element representing the benefit for which you are entering a dependent.
6. Choose the Others button and select Dependents.

Create Batch Lines

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Enter or query a batch header.
3. Choose the Assignment Set button.

Criteria Definition

1. Choose Mass Information eXchange: MIX -> System Extract -> Criteria Definition in the Navigator.

Custom Reports

1. Choose Processes and Reports -> Submit Custom Reports in the Navigator.

Customer

1. Choose Customer and Supplier Maintenance -> Customer in the Navigator.

DADS Files (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select DADS Files.

DADS Types (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.

Database Items

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Show Items button.

DateTrack History Change Field Summary

1. Choose Tools -> Datetrack History from the Tools menu.

Deduction (Payroll) (US, CA)

1. Choose Total Compensation -> Basic -> Deductions in the Navigator.

Define Combinations

1. Choose Total Compensation -> Rate/Coverage Definitions -> Combinations in the Navigator.

Define Extract

1. Choose Benefits Extract -> Extract Definition in the Navigator.

Define Function

1. Choose Other Definitions -> Formula Functions in the Navigator.

Define QuickPaint Report

1. Choose Processes and Reports -> Define a QuickPaint Report in the Navigator.

Define Task Flow

1. Choose Security -> Task Flow Definitions in the Navigator.

Define Task Flow Nodes

1. Choose Security -> Task Flow Nodes in the Navigator.

Delete Person

1. Choose People -> Delete Personal Records in the Navigator.

Denial of Within Grade Increase (FD)

1. Choose Request for Personnel Action -> Salary Change -> Denial of Within Grade Increase

Dependent/Beneficiary Designation

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Dependent/Beneficiary Designation in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Designees button.

Dependent Certifications

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program.
3. Choose the Dependent Coverage tabbed region
4. Choose the Certifications button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the Designations tab.
4. Choose the Dependent tab.
5. Choose the Certifications button.

Dependent Change of Life Event

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.

Dependent Change of Life Event Certification

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Dependent Change of Life Event button.
4. Select a life event and choose the Dependent Change of Life Event Certifications button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Dependent Change of Life Event button.
5. Select a life event and choose the Dependent Change of Life Event Certifications button.

Dependent Coverage Eligibility Profiles

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Dependent Coverage in the Navigator.

Dependent Eligibility Profiles

Do one of the following:

1. Choose Choose Total Compensation -> Programs and Plans -> Program Enrollment Requirements in the Navigator.
2. Query a program and choose the Dependent Coverage tabbed region.
3. Choose the Eligibility Profiles button.

Or:

1. Choose Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan and choose the Designations tabbed region.
3. Choose the Dependent tab.
4. Choose the Eligibility Profiles button.

Derived Factors

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Derived Factors in the Navigator.

Or:

1. Choose Work Structures -> Collective Agreements -> Define Derived Factors in the Navigator.

Derive Notice Period (Belgium)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.
4. Choose Derive Notice Period.

Or

Choose FastPath -> End Employment.

5. Enter or query an employee.
6. Choose Derive Notice Period.

Designation Requirements

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Options in the Navigator.
2. Query or enter an option.
3. Choose the Designation Requirements button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Designations button.

Disability (Not US, Not CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Disabilities.

Or:

1. Choose Fastpath -> Disabilities in the Navigator.
2. In the resulting Find window, query the person.

Dynamic Trigger Definition

1. Choose Other Definitions -> Dynamic Trigger Definition in the Navigator.

Dynamic Trigger Functional Area Grouping

1. Choose Other Definitions -> Dynamic Trigger Functional Area Grouping in the Navigator.

Duty Stations

1. Choose Federal Maintenance Forms -> Duty Stations in the Navigator.

Earnings (Payroll) (US, CA)

1. Choose Total Compensation -> Basic -> Earnings in the Navigator.

Edit Formula

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.
2. Enter or query a formula.
3. Choose the Edit button.

EEO-1 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select EEO-1 Filing.

Electable Choices

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button
3. Choose the Electable Choices button.

Elections

1. Choose Work Structures -> Elections

Element

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.

Element and Distribution Set

1. Choose Payroll -> Element Set in the Navigator.

Element Classifications (Payroll)

1. Choose Total Compensation -> Basic -> Classification in the Navigator.

Element Entries

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.

Or:

1. Choose Fastpath -> Entries in the Navigator.
2. In the resulting Find window, query the person.

Element Link

1. Choose Total Compensation -> Basic -> Link in the Navigator.

Element Withholding Reasons (UK)

1. Choose SSP/SMP -> Element Withholding Reasons in the Navigator.

Eligibility

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.
4. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.

2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Option Eligibility button.
5. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plans and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Participation Eligibility button.
6. Choose the Eligibility button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.
4. Choose the Eligibility button.

Employee Assignment Processes (Payroll)

1. Choose View -> Assignment Process Results in the Navigator.

Employment Certification (Hungary)

1. Choose Hungarian Web ADI Reports > Create Document in the Navigator.

Employee Review

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reviews.

Or:

1. Choose Fastpath -> Employee Review in the Navigator.
2. In the resulting Find window, query the person.

Employee Run Result History (Payroll)

1. Choose View -> Histories -> Run Results in the Navigator.

Or:

1. Choose Fastpath -> End Employment in the Navigator.
2. In the resulting Find window, query the person.

Employer Identification (US, CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Employer Identification

Employment Declaration (AU)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Declaration button.

Employment Equity Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the Field with the entry Business Group.
6. Choose the Others button.
7. Select Employment Equity Information and click OK.
8. Double-click in the FlexField to display the window.

Employment History (UK)

1. Choose FastPath -> Employment History in the Navigator.

End Application

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath -> End Application in the Navigator.
2. In the resulting Find window, query the person.

End Employment

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

Or:

1. Choose Fastpath -> End Employment in the Navigator.

Enrollment Action (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Enrollment Action Types in the Navigator.

Enrollment Opportunities

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.

Enrollment Override

1. Choose People -> Total Comp Enrollment -> Enrollment Override in the Navigator.

Enrollment Rules

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the Timing tab.
4. Choose the Scheduled tab or the Life Event tab.
5. Choose the Enrollment Rules button.

Enter Contingent Workers

1. Choose People -> Maintain Using Templates -> Enter Contingent Workers in the Navigator.

Enter Employees

1. Choose People -> Maintain Using Templates -> Enter Employees in the Navigator.

Entry Values

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.

3. Choose the Assignment button.
4. Choose the Entries button.
5. Select an entry and choose the Entry Values button.

Establishment EEO-1 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment EEO-1 Filing.

Establishment VETS-100 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Establishment VETS-100 Filing.

Event Bookings

Do one of the following:

1. Choose People -> Events and Bookings in the Navigator.

Or:

1. Choose Fastpath -> Event in the Navigator.
2. In the resulting Find window, query the person.

Event Groups

1. Choose Total Compensation -> Basic -> Event Groups in the Navigator.

Extension of NTE (FD)

1. Choose Request for Personnel Action -> Extension of NTE

External/Manual Payments (Payroll)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select External Pay.

Or:

1. Choose Fastpath -> External/Manual Payments in the Navigator.
2. In the resulting Find window, query the person.

Extra Details of Service

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Extra Details of Service.

Or:

1. Choose Fastpath -> Extra Details of Service.
2. In the resulting Find window, query the person.

Extra Element Information

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Extra Information button.

Extra Person Information (FD)

1. Choose People -> Enter and Maintain
2. Enter or query a person.
3. Choose the Others button and select Extra Information.

Extra Person Information Window (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Extra Information.
5. Choose a Type.
6. Choose Details.

Extract Definition

1. Choose Mass Information Exchange -> System Extract -> Extract Definition in the Navigator.

Extract Results

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.

Extract Results Details

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Details button.

Extract Results Errors

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Errors and Warnings button.

Extract Results Header and Trailer

1. Choose Mass Information eXchange -> System Extract -> Extract Results in the Navigator.
2. Query an extract run result and choose the Header and Trailer button.

Families, Nature of Action (FD)

1. Choose Federal Maintenance Forms -> Families and NOA Families.

Federal Tax Information <Employee> (CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Federal Tax Information region (if not already selected).

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.
3. Select the Federal Tax Information region.

Federal Tax Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Federal Tax Rules

Federal Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.

2. Enter or query an employee or applicant.
3. Chose the Tax Information button.

File Layout Advanced Conditions (US, UK, CA)

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Advanced Conditions button.

File Layout Include Conditions

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and query or enter a file layout.
3. Select a record and choose the Include Conditions button.

Financials Options

1. Choose Customer and Supplier Maintenance -> Financials Options in the Navigator.

Flex Credits (Advanced Benefits)

1. Choose Total Compensation -> Rate/Coverage Definitions -> Flex Credits in the Navigator.

Flex Program (Advanced Benefits)

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.

Form 941 Information (US)

1. Choose View -> Tax Information -> Form 941 Information in the Navigator.

Form Customization

1. Choose Security -> CustomForm in the Navigator.

Forms Configurator - see People Management Configurator

Formula

1. Choose Total Compensation -> Basic -> Write Formulas in the Navigator.

Formula Result Rules (Payroll):

1. Choose Total Compensation -> Basic -> Formula Results in the Navigator.

Forward Notification To (FD)

1. Choose Workflow Inbox
2. Choose a notification and then choose the Reroute button.

Frequency Rules (Payroll)

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Frequency Rules button.

Funding Distribution

1. Choose Work Structures -> Budget -> Worksheet in the Navigator.
2. Choose the Periods button to open the Budget Details window.
3. Choose the Budget Sets tab.
4. Choose the Budget Set Distribution button.

GL Daily Rates

1. Choose Payroll -> GL Daily Rates in the Navigator.

GL Daily Rates (US, CA)

1. Choose Total Compensation -> Basic -> Global Values in the Navigator.

GL Map (Payroll)

1. Choose Payroll -> GL Flexfield Map in the Navigator.

Globals

1. Choose Total Compensation -> Basic -> Global Values in the Navigator.

Global Pay Scale

1. Choose Work Structures -> Grade -> Global Pay Scale in the Navigator.

Global Security Profile

1. Choose Security -> Global Security Profiles in the Navigator.

Goods and Services

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Goods and Services in the Navigator.

Grade Rate

1. Choose Work Structures -> Grade -> Grade Rate in the Navigator.

Grade Scale

1. Choose Work Structures -> Grade -> Grade Steps and Points in the Navigator.

Grade Step Placement

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Grade Step.

Or:

1. Choose Fastpath -> Grade Step in the Navigator.
2. In the resulting Find window, query the person.

Grades

1. Choose Work Structures -> Grade -> Description in the Navigator.

Grades (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Grades.

GREs and other information <Employee> (CA)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Select the GREs and other information region.

Hiring Applicants

1. Choose People -> Maintain Using Templates -> Hire Applicants in the Navigator.

Hungarian Absence Report (Hungary)

1. Choose Hungarian Web ADI Reports > Create Document in the Navigator.

Imputed Income

1. Choose Total Compensation -> Rate/Coverage Definitions -> Imputed Income in the Navigator.

Information Type Security (US, UK, CA)

1. Choose Security -> Information Types Security in the Navigator.

Information Type Security (FD)

1. Choose Security -> Information Types

Input Values

1. Choose Total Compensation -> Basic -> Element Description in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

Insurance Provider (for a Company) (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Insurance Provider.

Insurance Provider (for an Establishment) (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Insurance Providers.

Insurance Provider Information (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Pension Provider.
3. Choose the Others button and select Insurance Provider Information.

Investment Options

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.
2. Query a person.
3. Choose the Investment Options button.

Job

1. Choose Work Structures -> Job -> Description in the Navigator.

Jobs (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Jobs.

Job Evaluation

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.
3. Choose the Evaluation button.

Job Grade (CA)

1. Choose Work Structures -> Job -> Job Grade in the Navigator.

Job Groups

1. Choose Work Structures -> Job -> Job Groups in the Navigator.

Job Requirements

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Enter or query a job.
3. Choose the Requirements button.

KR Mass Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of CWK and Employee Assignments in the Navigator.

KR Mass Employee Assignment Update

1. Choose People -> Mass Updates for Person -> KR Mass Update of Employee Assignments in the Navigator.

Layout Definition

1. Choose Benefits Extract -> Layout Definition in the Navigator.

Legal Employer Information (AU)

1. Choose Work Structures -> Organization -> Description in the Navigator.

2. Enter or query an organization.
3. Select GRE/Legal Entity and choose the Others button.
4. Select Legal Employer.
5. Click in the blank field.

Letter (for letters)

1. Choose Work Structures -> Recruitment Letter Type in the Navigator.

Letter (for contracts)

1. Choose Work Structures -> Contract Letter Type in the Navigator.

Life Event

Do one of the following:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab or the Plan Types tab.
5. Choose the Life Event button.

Or:

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Life Event button.

Life Event Certifications

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.
2. Query or enter a plan.
3. Choose the General tab.
4. Choose the Plan or Option tab.
5. Choose the Life Event Certifications button.

Life Event Reason Impact on Eligibility (Advanced Benefits)

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.
4. Choose the Life Event Eligibility button.

Life Event Reasons

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.

Limit Rules (Payroll) (US)

1. Choose View -> Wage Attachments -> Limit Rules in the Navigator.

Link Input Values

1. Choose Total Compensation -> Basic -> Link in the Navigator.
2. Enter or query an element.
3. Choose the Input Values button.

List Assignments

1. Choose View -> Lists -> Assignments in the Navigator.

List Budget Variance by Organization (AU)

1. Choose View -> Organization Budgets in the Navigator.

List Employees by Absence Type

1. Choose View -> Lists -> Employees by Absence Type in the Navigator.

List Employees by Element

1. Choose View -> Lists -> Employees by Element in the Navigator.

List Employees by Organization

1. Choose View -> Lists -> Employees by Organization in the Navigator.

List Employees by Position

1. Choose View -> Lists -> Employees by Position in the Navigator.

List Employees by Position Hierarchy

1. Choose View -> Lists -> Emps by Position Hierarchy in the Navigator.

List People by Assignment

1. Choose View -> Lists -> People by Assignment in the Navigator.

List People by Special Information

1. Choose View -> Lists -> People by Special Information in the Navigator.

Local Tax Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Local Tax Rules.

Locality Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> Locality Pay

Location

1. Choose Work Structures -> Location in the Navigator.

Locations (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Locations.

Lookups

1. Choose Other Definitions -> Application Utilities Lookups in the Navigator.

Maintain Contingent Workers

1. Choose People -> Maintain Using Templates -> Maintain Contingent Workers in the Navigator.

Maintain Employees

1. Choose People -> Maintain Using Templates -> Maintain Employees in the Navigator.

Maintain On Line Activities (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Authentication Activities in the Navigator.

Maintain Options Eligibility

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.

3. Choose the Options button.
4. Choose the Option Eligibility button.

Maintain Plan Eligibility

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Plan Eligibility button.

Maintain Plan Options

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Options button.

Maintain Plan Related Details

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Details button.

Maintain Pop Up Messages (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Message Configuration in the Navigator.

Maintain Visa Window (US)

1. Choose People -> Maintain Using Templates -> Maintain Visa in the Navigator.
2. Choose an employee.

Manual Payments

1. Choose People -> Total Comp Contribution -> Manual Payments in the Navigator.

Map Career Path

1. Choose Work Structures -> Job -> Career Path in the Navigator.

Map Salary Survey (US, UK, CA)

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Complete the Position window and save your work.
3. Choose the Define Survey Map button.

Or:

1. Choose Work Structures -> Job -> Description in the Navigator.
2. Complete the Job window and save your work.
3. Choose the Define Salary Map button.

Mass Applicant Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of Applicant Assignments in the Navigator.

Mass Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of Assignments in the Navigator.

Mass Awards (FD)

1. Choose Mass Actions ->Mass Awards
2. Choose Preview Mass Awards

Mass Employee Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of Employee Assignments in the Navigator.

Mass Move

1. Choose Work Structures -> Position -> Mass Move in the Navigator.

Mass Move - Assignments

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move - Positions window.
7. Choose the Assignments button.

Mass Move - Messages

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window and choose the Find button.

5. Complete the Mass Move - Positions window and choose the Assignments button.
6. Complete the Mass Move - Assignments window and close it.
7. From the Mass Move - Positions window, choose the Valid Grades button.
8. Complete the Valid Grades window and close it.
9. Close the Mass Move - Positions window.
10. From the Mass Move window, choose the Execute button.
11. If the Status field shows In Error or Complete with Warnings, a Message button appears.
12. If the Message button appears, choose it to view messages in the Mass Move - Messages window.

Note: Alternatively, you can view messages for saved (but not yet successfully executed) mass moves as follows:

13. Choose Work Structures -> Position -> Mass Move in the Navigator.
14. Enter the name of the saved mass move in the Description field.
15. When the Mass Move window is populated with data and the Message button appears, choose the Message button .

Mass Move - Positions

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window.
3. Save your work.
4. Choose the Positions button.
5. In the resulting Find Positions window, select or enter a Source Job and Source Position.
6. Choose the Find button.

Mass Move - Valid Grades

1. Choose Work Structures -> Position -> Mass Move in the Navigator.
2. Complete the Mass Move window and save your work.
3. Choose the Positions button.
4. Complete the Find Positions window.
5. Choose the Find button.
6. Complete the Mass Move - Positions window.
7. Choose the Valid Grades button.

Mass Position Update

1. Choose Work Structures -> Position -> Mass Position Update

Mass Realignment (FD)

1. Choose Mass Actions ->Mass Realignment
2. Choose Preview Mass Realignment

Mass Salary (FD)

1. Choose Mass Actions ->Mass Salary
2. Choose Preview Mass Salary

Mass Transfer In (FD)

1. Choose Mass Actions ->Mass Transfer In i
2. Choose Preview Mass Transfer In

Mass Transfer Out (FD)

1. Choose Mass Actions ->Mass Transfer Out
2. Choose Preview Mass Transfer Out

Mass UK Applicant Ass Update

1. Choose People -> Mass Updates for Person -> Mass Update of Applicant Assignments in the Navigator.

Mass UK Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of Assignments in the Navigator.

Mass UK Employee Assignment Update

1. Choose People -> Mass Updates for Person -> Mass Update of Employee Assignments in the Navigator.

Mass Update of Applicants

1. Choose Recruitment -> Mass Update of Applicants in the Navigator.

Maternity (UK)

1. Choose SSP/SMP ->Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Maternity button.

Maternity Evidence (UK)

1. Choose SSP/SMP ->Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a maternity absence.
5. Choose the Evidence button.

Maternity Pay (UK)

1. Choose SSP/SMP ->Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a maternity absence.
5. Choose the SSP/SMP button.

MD/DDS Nurse Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> MDDDS Nurse Pay

Medical Assessments

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Medical Assessments.

Or:

1. Choose Fastpath -> Medical Assessments in the Navigator.
2. In the resulting Find window, query the person.

Messages

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.
2. Choose the Messages button.

Message Configuration (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Message Configuration in the Navigator.

Mileage Element Template (UK)

1. Choose Total Compensation -> Basic -> Mileage Element Template in the Navigator.

Miscellaneous Plan

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Miscellaneous Plan in the Navigator.

MIX Batch Header

1. Choose Mass Information eXchange: MIX -> Batch Element Entry in the Navigator.

Monitor Batch Processes (Advanced Benefits)

1. Choose Processes and Reports -> Monitor Batch Processes in the Navigator.

Monthly Participant Premium

1. Choose People -> Total Comp Contribution -> Monthly Participant Premium in the Navigator.

Monthly Plan or Option Premium

1. Choose -> People -> Total Comp Contribution -> Monthly Premium in the Navigator.

Multiple Worksite Reporting (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select Multiple Worksite Reporting

NACHA Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select NACHA Rules

Name Change (FD)

1. Choose Request for Personnel Action -> Change Actions -> Name Change i

Nature of Action Legal Authorities (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> NOA Legal Authorities.

Net Calculation Rules

1. Choose Total Compensation -> Basic -> Accrual Plans in the Navigator.
2. Enter or query an accrual plan name.

3. Choose the Net Calculation Rules button.

New Hire Reporting (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a GRE.
3. Choose the Others button.
4. Select New Hire Reporting

New Zealand Information (NZ)

1. Choose People -> Enter and Maintain.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the New Zealand Information tab.

NOA Codes and Remarks (FD)

1. Choose Federal Maintenance Forms -> NOA Codes and Remarks

Non-Flex Program

1. Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.

Non Pay / Non Duty Status (FD)

1. Choose Request for Personnel Action -> Non Pay / Non Duty Status

Notifications (FD)

1. Choose Request for Personnel Action -> Workflow Inbox

Notifications Summary (FD)

Do one of the following:

1. Choose Workflow Inbox

NQF Assessment (South Africa)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select NQF Assessment.

NQF Learnership Agreements (South Africa)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select NQF Learnership Agreements.

NQF Qualification Titles (South Africa)

NQF Training (South Africa)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant.
3. Choose the Others button and select NQF Training.

Options

1. Choose Total Compensation -> Programs and Plans -> Options in the Navigator.

Organization

1. Choose Work Structures -> Organization -> Description in the Navigator.

Organization Hierarchy

1. Choose Work Structures -> Organization -> Hierarchy in the Navigator.

Organization Hierarchy Diagrammer

1. Choose Work Structures -> Organization -> Diagrammer in the Navigator.

Organization Hierarchies (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Organization Hierarchies.

Organization Manager Relationship

1. Choose Work Structures -> Organization -> Organization Manager in the Navigator.

Organizational Payment Method

1. Choose Payroll -> Payment Methods in the Navigator.

Organizations (for a Constituency)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a constituency.
3. Choose the Others button and select Organizations.

Other Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> Other Pay

Other Rates

1. Choose People -> Total Comp Enrollment -> Non-Flex Program in the Navigator.
2. Query a person.
3. Choose the Others button and select Other Rates.

Outcomes Achieved

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Competence Profile.
4. Select a unit standard competence and choose the Outcomes Achieved button.

Or:

1. Choose Fastpath -> Competencies in the Navigator.
2. Query a person.
3. Select a unit standard competence and choose the Outcomes Achieved button.

Outcomes and Assessment Criteria

1. Choose Career Management -> Competencies in the Navigator.
2. Enter or query a unit standard competence.
3. Choose the Outcomes button.

P45 (Payroll) (UK)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Tax Information.

Or:

1. Choose FastPath -> UK P45 Form in the Navigator.

2. In the resulting Find window, query the person.

Parent Organization

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Parent Organization.

Part Time Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Part Time Rebate.

Participant

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participant in the Navigator.

Participation Eligibility Profiles

1. Choose Total Compensation -> General Definitions -> Eligibility Profiles -> Participation Eligibility Profiles

Or:

1. Choose Work Structures -> Collective Agreements -> Define Eligibility Profiles in the Navigator.

Participation Overrides (Advanced Benefits)

1. Choose People -> Total Comp Participation -> Participation Overrides in the Navigator.

Pattern (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.

Pattern Time Units (UK)

1. Choose SSP/SMP -> Pattern Time Units in the Navigator.

Pay Adjustment (FD)

1. Choose Request for Personnel Action -> Salary Change -> Pay Adjustment.

Pay Advice Report (Payroll) (UK)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings in the Navigator.
2. In the resulting Find window, query the person.

Pay Plans (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Pay Plans.

Pay Scale

1. Choose Work Structures -> Grade -> Pay Scale in the Navigator.

Payment Schedule

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query or enter a flex credit definition and choose the Processing tabbed region.
3. Choose the Payment Schedule button.

Payments

1. Choose People -> Total Comp Contribution -> Record Contribution or Distribution
2. Choose the View Payments window.

Payroll

1. Choose Payroll -> Description in the Navigator.

Payroll Balances (UK)

1. Choose Work Structures -> Organization -> Description in the Navigator
2. Enter or query a Business Group
3. Choose the Others button and select Payroll Balances

Payroll Elements (UK)

1. Choose Work Structures -> Organization -> Description in the Navigator
2. Enter or query a Business Group
3. Choose the Others button and select Payroll Elements

Payroll Processes (Payroll)

1. Choose View -> Payroll Process Results in the Navigator.

Pension Provider (for a Company) (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Company.
3. Choose the Others button and select Pension Provider.

Pension Provider (for an Establishment)(France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Pension Providers.

Pension Provider Information (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Pension Provider.
3. Choose the Others button and select Pension Provider Information.

Pension Schemes (Hungary)

1. Choose Total Compensation -> Basic in the Navigator.
2. Choose Pension Schemes.

People

1. Choose People -> Enter and Maintain in the Navigator.

People Folder

1. Choose View -> Lists -> People Folder in the Navigator.

People Management Configurator (formerly Forms Configurator)

1. Choose Security -> People Management Configurator in the Navigator.

Performance

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Salary button.
4. Choose the Performance button.

Or:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee, and choose the Assignment button.
3. Choose the Others button and select Performance.

Period Dates

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.
3. Choose the Period Dates button.

Period-to-Date Limits

Do one of the following:

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Period-to-Date Limits in the Navigator.

Or:

1. Choose Total Compensation -> Rates/Coverage Definitions -> Flex Credits in the Navigator.
2. Query a compensation object.
3. Choose the Activity Rate button.
4. Choose the Period to Date Limit button.

Period Types

1. Choose Other Definitions -> Time Periods in the Navigator.

Person Benefits Assignment

1. Choose People -> Total Comp Participation -> Person Benefits Assignment

Person Benefits Balances

1. Choose People -> Total Comp Participation -> Person Benefits Balances in the Navigator.

Person Changes

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.
4. Choose the Define Person Change button.

Person Changes Cause Life Events

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Person Changes button.

Person Communications (Advanced Benefits)

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Communications in the Navigator.

Person Enrollment Action Items (Advanced Benefits)

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Enrollment Action Items in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Action Items button.

Person Enrollment Certificates (Advanced Benefits) (CA)

1. Choose People -> Enrollment Process -> Person Enrollment Certificates in the Navigator.

Person Enrollment Certifications (Advanced Benefits)

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Enrollment Certifications in the Navigator.

Or:

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Certifications button.

Person Life Events

Person Life Events

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Person Life Events

Or (Advanced Benefits):

Choose People -> Total Comp Enrollment -> Enrollment Process -> Person Life Events

Person Primary Care Provider

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Person Primary Care Provider in the Navigator.

Person Summary (FD)

1. Choose Person Summary

Person Types

1. Choose Other Definitions -> Person Types in the Navigator.

Person Type Usage

1. Choose Fastpath -> Person Type Usage in the Navigator.

Personal Payment Method

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Pay Method button, or choose the Others button and select Pay Method.

Or:

1. Choose Fastpath -> Pay Method in the Navigator.
2. In the resulting Find window, query the person.

Phone Numbers

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Choose Phones.

Or:

1. Choose Fastpath -> Phones in the Navigator.
2. In the resulting Find window, query the person.

Picture

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator
2. Enter or query a person.
3. Choose the Picture button.

Or:

1. Choose Fastpath -> Picture in the Navigator.
2. In the resulting Find window, query the person.

Plan and Plan Type

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.

Plan Design Copy

1. Choose Total Compensation -> Programs and Plans -> Plan Design Copy in the Navigator.

Plan Design Wizard

1. Choose Total Compensation -> Programs and Plans -> Plan Design Wizard

Plan Enrollment Requirements

1. Choose Total Compensation -> Programs and Plans -> Plan Enrollment Requirements in the Navigator.

Plan in Program Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plans tab.
5. Choose the Participation Eligibility button.

Plan Reimbursement

1. Choose Total Compensation -> General Definitions -> Programs and Plans -> Plan Reimbursement in the Navigator.

Plan Type Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Type tab.
5. Choose the Participation Eligibility button.

Plan Types

1. Choose Total Compensation -> Programs and Plans -> Plan Types in the Navigator.

Plans

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.

Position

1. Choose Work Structures -> Position -> Description in the Navigator.

Position (FD)

1. Choose Work Structures -> Position -> Description

Position Abolish (FD)

1. Choose Request for Personnel Action -> Federal Position -> Abolish

Position Change (FD)

1. Choose Request for Personnel Action -> Federal Position Change

Position Copy

1. Choose Work Structures -> Position -> Position Copy in the Navigator.

Position Copy (FD)

1. Choose Work Structures -> Position -> Description

Position Description (FD)

1. Choose Federal Position Description in the Navigator.

Position Description Routing History (FD)

1. Choose Position Description -> Reference button

Position Establish (FD)

1. Choose Request for Personnel Action -> Federal Position -> Establish

Position Evaluation

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Evaluation button.

Position Hierarchy

1. Choose Work Structures -> Position -> Hierarchy in the Navigator.

Position Hierarchy

1. Choose Work Structures -> Position -> Diagrammer in the Navigator.

Position Occupancy Folder

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Query a position.
3. Choose the Occupancy button.

Position Reporting To

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Reporting To button.

Position Requirements

1. Choose Work Structures -> Position -> Description in the Navigator.
2. Enter or query a position.
3. Choose the Requirements button.

Position Review (FD)

1. Choose Request for Personnel Action -> Federal Position -> Review

Position Transaction

1. Choose Work Structures -> Position -> Position Transaction in the Navigator.

Possible Certifications

1. Choose People -> Total Comp Participation
2. Choose the Enrollment Opportunities button.
3. Choose the Electable Choices button
4. Choose the Possible Certifications button

Postal/Zip

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Postal/Zip in the Navigator.

Previous Employment

1. Choose People -> Enter and Maintain in the navigator
2. Query a person.
3. Choose the Others button.
4. Select Previous Employment.

Previous Services Validation pages (France)

1. Choose People ->Services Validation in the Navigator

Primary Care Providers

Do one of the following:

1. Choose People -> Total Comp Enrollment -> Person Primary Care Provider

Or:

1. Choose People -> Total Comp Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Care Providers button.

Prior Employment SSP (SSP1L) (UK)

1. Choose SSP/SMP ->Person Details in the Navigator.
2. Enter or query a person.
3. Choose the SSP1L button.

Process Log

1. Choose Processes and Reports -> Process Log in the Navigator.

Program/Plan Years

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Program/Plan Years in the Navigator.

Programs

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.

Program Enrollment Requirements

1. Choose Total Compensation -> General Definitions -> Programs and Plans -> Program Enrollment Requirements in the Navigator.

Program Participation Eligibility

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Participation Eligibility button.

Program Waive Certifications

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.
6. Choose the Waive Certification button.

Program Waive Reasons

1. Choose Total Compensation -> Programs and Plans -> Programs in the Navigator.
2. Query or enter a program.
3. Choose the Plan and Plan Types button.
4. Choose the Plan Types tab.
5. Choose the Waive button.

Promotion (FD)

1. Choose Request for Personnel Action -> Salary Change -> Promotion

Provincial Employment Standard (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.

3. Position the cursor in the Organization Classifications Name field.
4. Select the Business Group from the List of Values.
5. Position the cursor in the field with the entry Business Group.
6. Choose the Others button.
7. Select Provincial Employment Standard and click OK.
8. Double-click in the FlexField to display the window.

Provincial Reporting Info. (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. Position the cursor in the Organization Classifications Name field.
4. Select GRE/Legal Entity from the List of Values.
5. Position the cursor in the field with the entry GRE/Legal Entity.
6. Choose the Others button.
7. Select Provincial Reporting Info and click OK.
8. Double-click in the FlexField to display the window.

Provincial Tax Information <Employee> (CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Tax Information button.
5. Select the Provincial Tax Information region.

Or:

1. Choose People -> Fastpath -> Tax Sign-up in the Navigator.
2. In the resulting Find window, query an employee.
3. Select the Provincial Tax Information region.

Qualification Competencies

1. Choose Career Management -> Qualification Types in the Navigator.
2. Enter or select a Qualifications Framework qualification.
3. Choose the Competencies button.

Qualification Types

1. Choose Career Management -> Qualification Types in the Navigator.

Qualifications

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Qualifications.

Or:

1. Choose Fastpath -> Qualifications in the Navigator.

Quality Increase (FD)

1. Choose Request for Personnel Action -> Salary Change -> Quality Increase

QuickPaint Inquiry

1. Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.
2. Query a report that has been run.
3. Choose the View Report button.

QuickPay (Payroll)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select QuickPay.

Or:

1. Choose Fastpath -> QuickPay in the Navigator.
2. In the resulting Find window, query the person.

Rating Scales

1. Choose Career Management -> Rating Scales in the Navigator.

Realignment (FD)

1. Choose Request for Personnel Action -> Realignment

Reassignment (FD)

1. Choose Request for Personnel Action -> Reassignment

Record Continuing Benefits Payments

1. Choose People -> Total Comp Contribution -> Record Continuing Benefits Payments in the Navigator.

Record Layout Advanced Conditions (US, UK)

1. Choose Benefits Extract -> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Advanced Conditions button.

Record Layout Include Conditions

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Include Conditions button.

Recruit / Fill (FD)

1. Choose Request for Personnel Action -> Recruit / Fill

Recruiting For

1. Choose Recruitment -> Recruitment Activity in the Navigator.
2. Enter or query a recruitment activity.
3. Choose the Recruiting For button.

Recruitment Activity

1. Choose Recruitment -> Recruitment Activity in the Navigator.

Reduction in Force Retention Register (FD)

1. Choose Reduction in Force (RIF).

Registered Employer Information (NZ)

1. Choose Work Structures -> Organization -> Hierarchy.
2. Enter or query an organization.
3. Select GRE/Legal Entity in the Organization Classification region.
4. Choose Others -> Registered Employer.

Regulations

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Regulations in the Navigator.

Regulatory Bodies and Regulations

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.
2. Query or enter a reporting group.
3. Choose the Plan Regulatory Bodies and Regulations button.

Reimbursements Requests (Advanced Benefits)

1. Choose People -> Total Comp Distribution -> Reimbursements Requests in the Navigator.

Related Person Changes

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.
4. Choose the Define Related Person Change button.

Related Person Changes Cause Life Events (Advanced Benefits)

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Life Event Reasons in the Navigator.
2. Query or enter a life event.
3. Choose the Related Person Changes button.

Remark Codes and Descriptions (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Remark Codes and Descriptions.

Reporting Categories (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Categories.

Reporting Groups

1. Choose Total Compensation -> General Definitions -> Additional Setup -> Reporting Groups in the Navigator.

Reporting Statuses (CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.

2. Enter or query a Business Group.
3. Choose the Others button and select Reporting Statuses.

Representative Body

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a representative body.
3. Choose the Others button and select Representative Body.

Representative Body (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a representative body.
3. Choose the Others button and select Representative Body.

Request for Personnel Action (FD)

1. Choose Request for Personnel Action

Request Letter

1. Choose Recruitment -> Request Recruitment Letter in the Navigator.

Request Set

1. Choose Security -> Report Sets in the Navigator.

Requisition and Vacancy

1. Choose Recruitment -> Requisition and Vacancy in the Navigator.

Restricted Form Process Methods (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Short Form / Restricted Data.

RetroPay Set (Payroll)

1. Choose Payroll -> RetroPay Set in the Navigator.

Return to Duty (FD)

1. Choose Request for Personnel Action -> Return to Duty

Reverse Payroll Run (Payroll)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Reverse Run.

Or:

1. Choose Fastpath -> Reverse Payroll Run in the Navigator.
2. In the resulting Find window, query the person.

RIF Exception (FD)

1. Choose Request for Personnel Action -> RIF Exception.

Robien Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Robien Rebate.

Roles

1. Choose Transaction Maintenance Forms -> Roles in the Navigator.

Routing

1. Choose Work Structures -> Position -> Position Transaction in the Navigator.
2. Choose Save from the File menu.

Or:

1. Choose Work Structures -> Budget -> Budget Worksheet in the Navigator.
2. Choose Save from the File menu.
3. Choose Save from the File menu.

Routing Group and Groupbox Details (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Routing Groups and Groupboxes.

Routing Group and Routing List Details (FD)

1. Choose Request for Personnel Action -> Federal Maintenance Forms -> Routing Lists.

Routing History (FD)

Do one of the following:

1. Choose Request for Personnel Action -> Reference button.

Or

Open the Workflow inbox and select a notification.

2. Choose Routing History button.

Routing Lists

1. Choose Transaction Maintenance Forms ->Routing Lists in the Navigator.

Rows

1. Choose Other Definitions -> Table Structure in the Navigator.
2. Enter or query a table.
3. Choose the Rows button.

Run QuickPaint Report

1. Choose Processes and Reports -> Run a QuickPaint Report in the Navigator.

Salary Administration

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Salary button.

Or:

1. Choose Fastpath -> Salary in the Navigator.
2. In the resulting Find window, query the person.

Salary Basis

1. Choose Total Compensation -> Basic -> Salary Basis in the Navigator.

Salary History

Do one of the following:

1. Choose View -> Histories -> Salary in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Salary History button.

Or:

1. Choose Fastpath -> Salary History in the Navigator.
2. In the resulting Find window, query the person.

Salary Management Folder

1. Choose People -> Salary Management in the Navigator.

Salary Surveys

1. Choose Total Compensation -> Basic -> Salary Survey in the Navigator.

Salary Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.

Savings Plan

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.

Savings Plan (UK)

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Savings Plan in the Navigator.
2. Choose the Record Layout tab and query or enter a record layout.
3. Select a Data Element and choose the Include Conditions button.

Scale Rate

1. Choose Work Structures -> Grade -> Point Values in the Navigator.

Schedules (UK)

1. Choose SSP/SMP -> SSP Qualifying Patterns in the Navigator.
2. Enter or query a pattern.
3. Choose the Calendars button.
4. Choose the Schedules button.

Schools and Colleges

1. Choose Career Management -> Schools and Colleges in the Navigator.

Schools and Colleges Attended

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Schools/Colleges.

Secondary Statuses

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an applicant or employee.
3. Do one of the following:

For an applicant:

- Choose the Others button and select Application.
- Choose the Secondary Status button.

For an employee:

- Choose the Assignment button.
- Choose the Others button and select Secondary Status.

Or:

1. Choose Fastpath -> Secondary Status in the Navigator.
2. In the resulting Find window, query the person.

Security Groups (UK)

1. Choose Security -> Security Groups in the Navigator.

Security Profile

1. Choose Security -> Profile in the Navigator.

Seniority pages (France)

1. Choose Other Definitions -> Seniority in the Navigator

Separation (FD)

1. Choose Request for Personnel Action -> Separation

Service Areas

1. Choose Total Compensation -> General Definitions -> Eligibility/Rate Factors -> Service Areas in the Navigator.

Set of Books

1. Choose Customer and Supplier Maintenance -> Set of Books in the Navigator.

Sickness Control Rules (UK)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Business Group

3. Choose the Others button and select Sickness Control Rules.

Sickness Evidence (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a sickness absence.
5. Choose the Evidence button.

Sickness Pay (UK)

1. Choose SSP/SMP -> Person Details in the Navigator.
2. Enter or query a person.
3. Choose the Absence button.
4. Enter or query a sickness absence.
5. Choose the SSP/SMP button.

Social Insurance Information (Germany)

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Social Insurance Information button.

Social Security Information (Spain)

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Social Security Information button.

Or:

1. Choose Fastpath -> Social Security Information in the Navigator.
2. In the resulting Find window, query the person.

Social Security Rebate (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Social Security Rebate.

Sort

1. Choose Mass Information eXchange -> System Extract -> Layout Definition in the Navigator.
2. Choose the File Layout tab and select a Record Name.
3. Choose the Sort button.

Special Information

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Special Info button.

Or:

1. Choose Fastpath -> Special Information in the Navigator.
2. In the resulting Find window, query the person.

Special Information Types

1. Choose Other Definitions -> Special Information Types in the Navigator.

Special Rates

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment -> Flex Program in the Navigator.
2. Query a person.
3. Choose the Special Rates button.

SQWL Employer Rules (1) (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (1)

SQWL Employer Rules (2) (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL Employer Rules (2)

SQWL Generic Transmitter Rules (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).

3. Choose the Others button and select SQWL Generic Transmitter Rules

SQWL State-Specific Transmitter Rules (Payroll) (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select SQWL State Transmitter Rules

Standard Distributions/Contributions (US)

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Standard Distributions/Contributions in the Navigator.

Standard Holiday Absences <Employee> (CA)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button.
4. Select Standard Holiday Absences.

Or:

1. Choose People -> Fastpath -> Statutory Holidays in the Navigator.
2. In the resulting Find window, query an employee.

Standard Rates

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Standard Rates in the Navigator.

Standard Holiday Absences (FR)

1. Choose FastPath -> Standard Holiday Absences

State Tax Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select State Tax Rules.

State Tax Rules <Employee> (US)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Chose the Tax Information button.

4. Choose the Tax information button from the Federal Tax Rules <Employee> window.

Statement of Earnings (Payroll) (US)

Do one of the following:

1. Choose View -> Assignment Process Results
2. Choose the SOE Report button.

Or:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Others button and select Statement of Earnings.

Or:

1. Choose Fastpath -> US Statement of Earnings in the Navigator.
2. In the resulting Find window, query the person.

Statement of Earnings (AU)

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> Statement of Earnings.

Or:

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> QuickPay.
4. Choose View Results -> Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings.
2. Enter employee details.

Statement of Earnings (New Zealand) (NZ)

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> Statement of Earnings.

Or:

1. Choose People -> Enter and Maintain.
2. Query a person.
3. Choose Assignment -> Others -> QuickPay.

4. Choose View Results -> Statement of Earnings.

Or:

1. Choose FastPath -> Statement of Earnings.
2. Enter employee details.

Statutory Holiday Absences

1. Choose FastPath -> Statutory Holiday Absences in the Navigator

Statutory Situations

1. Choose Work Structures -> Statutory Situations in the Navigator.

Step Adjustment (FD)

1. Choose Request for Personnel Action -> Salary Change -> Step Adjustment

Step Increase with Pay (FD)

1. Choose Request for Personnel Action -> Salary Change -> Step Increase with Pay

Submit a New Request

1. Choose Processes and Reports -> Submit Processes and Reports in the Navigator.
2. Select Single Request or a Request Set.

Superannuation Fund Information (AU)

1. Choose Work Structures -> Organization -> Description.
2. Enter or query an organization.
3. Select Payee Organization and choose the Others button.
4. Click in the blank field.

Supplementary Roles

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select Supplementary Roles.

Supplier

1. Choose Customer and Supplier Maintenance -> Supplier in the Navigator.

System Options

1. Choose Customer and Supplier Maintenance -> System Options in the Navigator.

Table Event Updates (UK)

1. Choose Other Definitions -> Table Event Updates in the Navigator.

Table Structure

1. Choose Other Definitions -> Table Structure in the Navigator.

Table Values

1. Choose Other Definitions -> Table Values in the Navigator.

Taxation Information (New Zealand) (NZ)

1. Choose People -> Enter and Maintain.
2. Enter or query an employee.
3. Choose the Assignment button.
4. Choose the Entries button.
5. Select PAYE Information in the Element Name column.
6. Click on the Entry Values button.

Tax Information (Germany)

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

Tax Information (Ireland)

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

Tax Information (Spain)

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Choose the Assignments button.
3. Choose the Tax Information button.

Or:

1. Choose Fastpath -> Tax Information in the Navigator.
2. In the resulting Find window, query the person.

Terminate

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Employment.

Terminate Applicant

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee.
3. Choose the Others button and select End Application.

Or:

1. Choose Fastpath -> End Application in the Navigator.
2. In the resulting Find window, query the person.

Termination of Grade Retention (FD)

1. Choose Request for Personnel Action -> Salary Change -> Termination of Grade Retention

Termination of Interim WGI (FD)

1. Choose Request for Personnel Action -> Salary Change -> Termination of Interim WGI

Termination Payments (AU)

1. Choose FastPath -> Termination Payments.

Transaction Categories

1. Choose Transaction Maintenance Forms -> Transaction Categories in the Navigator.

Transaction Category Wizard

1. Choose Maintenance Forms -> Transaction Category Wizard.

Transaction Status

1. Choose Security -> Transaction Status in the Navigator

Transaction Templates

1. Choose Transaction Maintenance Forms ->Transaction Templates in the Navigator.

Transport Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Transport Tax Info.

Unions Processing

1. Choose Total Compensation -> Basic -> Union Element Creation Template.

Update Payroll Run (Payroll)

1. Choose Payroll -> Update Payroll Run in the Navigator.

URSSAF Center Information (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a URSSAF Center.
3. Choose the Others button and select URSSAF Center Information.

URSSAF Information (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select URSSAF.

User Types and Statuses

1. Choose Other Definitions ->User Types and Statuses

Valid Grades (for jobs)

1. Choose Work Structures in the Navigator.
2. Choose either Job -> Description or Position -> Description.
3. Enter or query a job or position.
4. Choose the Valid Grades button.

Valid Payment Methods

1. Choose Payroll -> Description in the Navigator.
2. Enter or query a payroll.

3. Choose the Valid Payment Methods button.

Variable Rate Profiles

1. Choose Total Compensation -> General Definitions -> Rate/Coverage Definitions -> Variable Rate Profiles in the Navigator.

VETS-100 Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select VETS-100 Filing.

Vehicle Data Entry (UK)

1. Choose Total Compensation -> Basic -> Vehicle Data Entry in the Navigator.

View Absence History

1. Choose View -> Histories -> Absence in the Navigator.

View Earnings and Deductions Balances (US, CA)

Do one of the following:

1. Choose View -> Employee Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Employee Balances in the Navigator.
2. In the resulting Find window, query the person.

View Element Entry History for Employee

1. Choose View -> Histories -> Entries in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the Entry History button.

View Employee Dental, Medical and Vision Benefits (US)

1. Choose View -> Employee Benefits in the Navigator.
2. Run a query in the Assignments Folder window.
3. Select an employee assignment and choose the View Benefits button.

View Employee Grade Comparatio

1. Choose View -> Grade Comparatio in the Navigator.

View Enrollment Results

1. Choose People -> Total Comp Enrollment -> Benefits Enrollment Enrollment -> View Enrollment Results in the Navigator.

View Participation Information (Advanced Benefits)

1. Choose People -> Total Comp Participation -> View Participation Information in the Navigator.

View Program Structure

1. Choose Total Compensation -> Programs and Plans -> View Program Structure in the Navigator.

View Run Messages (Payroll)

1. Choose View -> System Messages in the Navigator.

View Tax Balances (US, CA)

Do one of the following:

1. Choose View -> Tax Information -> Tax Balances in the Navigator.
2. Select an employee assignment and choose the Balances button.

Or:

1. Choose Fastpath -> Tax Balances in the Navigator.
2. In the resulting Find window, query the person.

View Vacancies

1. Choose View -> Vacancies in the Navigator.

Visa Data Template

1. Choose People -> Maintain Using Templates -> Maintain Visa Information

W2 Reporting Rules (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Government Reporting Entity (GRE).
3. Choose the Others button and select W2 Reporting Rules.

W941 (Payroll) (US)

1. Choose View -> Tax Information-> Form 941 Information in the Navigator

Wage Attachment Earnings Rules (US)

1. Choose Total Compensation -> Wage Attachment -> Earnings Rules in the Navigator.

Wage Attachment Exemption Rules (US)

1. Choose Total Compensation -> Wage Attachment -> Exemption Rules in the Navigator.

Wage Attachment Limit Rules (US)

1. Choose Total Compensation -> Wage Attachment -> Limit Rules in the Navigator.

Waive Participation (Advanced Benefits)

1. Choose People -> Total Comp Participation -> Waive Participation in the Navigator.

Waiving

1. Choose Total Compensation -> Programs and Plans -> Plans in the Navigator.
2. Query or enter a plan.
3. Choose the Waiving button.

WC Codes and Rates (US)

1. Choose Work Structures -> Job -> Workers Compensation Rates in the Navigator

Welfare Tax Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Welfare Tax Info.

What-if Eligibility (Advanced Benefits)

1. Choose People -> Total Comp Participation -> What-if Eligibility in the Navigator.

Work Accident Info (France)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Establishment.
3. Choose the Others button and select Work Accident Info.

Work Choices (Job and Position)

1. Choose Work Structures -> Job or Position -> Description in the Navigator.
2. Enter or query a job or position.

3. Choose the Work Choices button.

Work Choices (Person)

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query a person.
3. Choose the Others button and select Work Choices.

Work Day Information

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Day Information.

Work Incident

Do one of the following:

1. Choose People -> Enter and Maintain in the Navigator.
2. Enter or query an employee or applicant.
3. Choose the Others button and select Work Incidents.

Or:

1. Choose Fastpath -> Work Incidents in the Navigator.
2. In the resulting Find window, query the person.

Work Schedule (US, CA)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an organization.
3. Choose the Others button and select Work Schedule.

Work Site Filing (US)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query a Reporting Establishment.
3. Choose the Others button and select Work Site Filing.

Worker's Compensation (US)

1. Choose Work Structures -> Job -> Workers Compensation Codes in the Navigator

Worksheet

1. Choose Work Structures -> Budget -> Worksheet in the Navigator.

2. Define the properties of the worksheet.
3. Choose the Create Worksheet button.

Worksheet Characteristics

1. Choose Work Structures ->Budget ->Worksheet in the Navigator.

ZA ACB Installation Information (South Africa)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA ACB Installation Information.

ZA Tax File Creator Information (South Africa)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select Business Group.
4. Choose the Others button and select ZA Tax File Creator Info.

ZA Tax Information (South Africa)

1. Choose Work Structures -> Organization -> Description in the Navigator.
2. Enter or query an Organization.
3. In Organization Classification, select GRE/Legal Entity.
4. Choose the Others button and select ZA Tax Information.

Reports and Processes in Oracle HRMS

This section shows the default reports and processes in Oracle HRMS as they are supplied. The responsibility that you use determines which reports you can use and how you access them.

The reports are divided into functional areas, as follows:

- Organization Structures, page B-2
- Jobs and Positions, page B-2
- People Budgets and Costing, page B-4
- Employment Agreements and Legal Compliance, page B-6
- Recruiting and Hiring, page B-10
- People Management, page B-21
- Competencies, Qualifications and Development, page B-40
- Learning Management, page B-42
- General Compensation Structures, page B-47
- Salary and Grade Related Pay and Progression, page B-47
- Compensation and Awards Management, page B-54
- Leave and Absence Management, page B-55
- Health and Welfare Management, page B-57
- Other Payroll Earnings and Deductions, page B-58
- Payrolls, page B-58
- Payroll Payment and Distributions, page B-59
- Payroll Statutory Deductions and Reporting, page B-61
- Payroll Processing and Analysis, page B-67
- Payroll Event Rules, page B-72
- Deploy Self Service Capability, page B-72
- Workforce Intelligence, page B-72

This is followed by the list of processes, page B-72.

Reports

Organization Structures

Location Occupancy Report (FD)

Lists all employees that currently or have at one time occupied a Location from the date you specify to the date the report is run

Organization Hierarchy Report

The organizations and optionally their managers below a selected position in a particular hierarchy.

Organization Workforce Report (HRMSi)

This report investigates the performance of your organizations as measured by the increase and decrease in workforce over a selected time period. Click on the organization name in the table to investigate the workforce changes for a particular organization, using the Workforce Summary Analysis report.

Jobs and Positions

Employee Job and Position Detail – Employee Work Choices by Job

This worksheet enables you to analyze deployment factors for jobs, people in specific jobs, and job applicants.

Employee Job and Position Detail – Employee Work Choices by Position

This worksheet enables you to analyze deployment factors for positions, people in specific positions, and position applicants.

Employee Job and Position Detail – Employee by Job and Position

This worksheet enables you to analyze assignment details for employees within an organization by job and position.

Job and Position Special Information Detail – Job and Position Special Information

This worksheet enables you to analyze special information types associated with jobs and positions.

Job and Position Skills Matching Report

Lists of employees, applicants or both that meet some or all skill requirements of a job or position.

Mass Realignment Deselection (FD)

Lists employees deselected for realignment

Mass Realignment PA Listing for All (FD)

Notification of Personnel Action in list form for employees selected for a realignment.

Mass Realignment PA Listing for Employee (FD)

Notification of Personnel Action in list form for an individual employee selected for a realignment.

Mass Realignment Preview (FD)

Lists employees selected for a realignment

Mass Transfer In Deselection (FD)

Lists employees deselected for a Transfer In action

Mass Transfer In PA Listing for All (FD)

Notification of Personnel Action in list form for employees selected for a Transfer In action

Mass Transfer In PA List for Employee (FD)

Notification of Personnel Action in list form for an individual employee selected for a Transfer In action

Mass Transfer In Preview (FD)

Lists employees selected for a Transfer In action

Mass Transfer Out Deselection (FD)

Lists employees deselected for a Transfer Out action

Mass Transfer Out PA Listing for All (FD)

Notification of Personnel Action in list form for employees selected for a Transfer Out action

Mass Transfer Out PA List for Employee (FD)

Notification of Personnel Action in list form for an individual employee selected for a Transfer Out action

Mass Transfer Out Preview (FD)

Lists employees selected for a Transfer Out action

Organization Separation Report (HRMSi)

This report investigates the performance of your best and worst organizations based on the workforce separation. This can be an absolute figure or a percentage of the workforce for the organization. If you click on the organization name in the table you can investigate the workforce changes for an organization.

Position Description (FD)

Lists the details of an approved position classification

Position Hierarchy Report

The positions and optionally their holders below a selected position in a particular hierarchy.

Pre Hire Report (Payroll) (France)

This report has to be delivered to an establishment's local URSSAF center when a person is about to become a new employee in that establishment.

Reduction in Force Retention Register (FD)

Lists selected employees

Re-integration Actions Report (Netherlands)

Lists all re-integration actions for employees.

People Budgets and Costing

Budget Period Position Detail Report

Lists the status of all Positions that are part of a specific Budget.

Employee Budget (Non Positional Control) Status – by Grade (HRMSi)

This report investigates the difference between budgeted and actual workforce for different grades in your enterprise.

Employee Budget (Non Positional Control) Status – by Job (HRMSi)

This report investigates the difference between budgeted and actual workforce for different jobs for your enterprise.

Employee Budget (Non Positional Control) Status – by Organization (HRMSi)

This report investigates the difference between budgeted and actual workforce for your enterprise.

Employee Budget (Non Positional Control) Status – by Position (HRMSi)

This report investigates the difference between budgeted and actual workforce for different positions for your enterprise.

Employee Budget Trend – by Grade (HRMSi)

This report investigates the difference between budgeted and actual workforce for different grades in your enterprise.

Employee Budget Trend – by Job (HRMSi)

This report investigates the difference between budgeted and actual workforce for different jobs for your enterprise.

Employee Budget Trend – by Organization (HRMSi)

This report investigates the difference between budgeted and actual workforce for your enterprise.

Employee Budget Trend – by Position (HRMSi)

This report investigates the difference between budgeted and actual workforce for different positions for your enterprise.

Entity Element Summary

Use this report if you administer position control budgets. The report lists the budget status for a pay element and entity for a specified time interval.

Headcount Budget Trend (HRMSi, DBI)

This report shows changes in actual and budgeted employee headcount over time for the selected top line manager.

Organization Budget (Non-Position Control) Report (HRMSi)

This report investigates the performance of your best and worst organizations. Performance can be measured by a variety of indicators, but for this report, performance is judged by the variance between the budgeted and actual workforce in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

Note: Non-Position Control reports are based on the budget scheme in use prior to 11i.PER.G mini-pack.

Organization Budget (Position Control) Report (HRMSi)

This report investigates the performance of your best and worst organizations. Performance can be measured by a variety of indicators, but for this report, performance is judged by the variance between the budgeted and actual workforce in each organization. Top organizations are those with the largest variance. Bottom organizations are those with the least variance.

Note: Position Control reports are based on the budget scheme in use since the 11i.PER.G mini-pack.

Organizational Position Summary Report

Lists the budget status for all positions within a Position Control Organization.

Position Element Detail Report

Lists the budget status for all budgeted elements for a specific Position and Organization.

Position Element Summary Report

Lists the budget status for an element for all positions in the Business Group.

Position Summary Report

Lists the budget status of all Positions in a specific Organization.

Report Under Budgeted Entities

Run this report if you administer position control budgets. The report lists the positions that are under budgeted for the selected organization and all subordinate organizations in the organization hierarchy.

Report Under Budgeted Positions (Salary)

HRMS still supports this report, run in previous versions for administering position control budgets. The report lists the positions that are under budgeted for the organization you select, and all subordinate organizations in the organization hierarchy. Oracle recommends you use Report Under Budgeted Entities, which adds the ability to report on organizations, jobs, and grades, as well as positions.

Social Security Affiliation Archiver (MX)

Mandatory statutory Social Security report that compiles a list of all employee status changes for a GRE during a reporting period.

Social Security Affiliation Reports (MX)

Arranges the data generated by the Social Security Affiliation Archiver report into a format suitable for electronic submission to the Mexican Social Security agencies.

Staffing Budget Details Report

Compares actual staffing level with budgeted levels over a specified period.

Workforce Budget (Non-Position Control) Report (HRMSi)

This report compares the amount of workforce you have budgeted for against the amount of workforce that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

Workforce Budget (Position Control) Report (HRMSi)

This report compares the amount of workforce you have budgeted for against the amount of workforce that actually exists. The report enables you to review all the organizations within a budget. You can select the time period you want to analyze.

Employment Agreements and Legal Compliance

AA/EEO Breakdown Report (FD)

Government required ethnicity and gender breakdown report by Occupational Category or Pay Plan

AAP Reports (US)

Provides Job group analysis and workflow analysis reports.

ADA Reports (US)

Shows how your enterprise is responding to the requests of employees with disabilities.

Attestation ASSEDIC Report (Payroll) (FR)

A mandatory report given to an employee on leaving the company. It details specific information about their employment.

Bilan Social Report (Payroll) (France)

A statutory report that lists a large number of HR and Payroll related indicators in order to provide a summary of many aspects affecting a company or establishment's human resources in a year.

Compliance (Person, United States Specific) Detail – Detailed Special Information (US)

This Discoverer worksheet enables you to view special employee information for employees within your organization.

Compliance (Person, United States Specific) Detail – Disabilities (US)

This Discoverer worksheet enables you to view special information concerning employees with disabilities within your organization.

Compliance (Person, United States Specific) Detail – Disability Accommodations (US)

This Discoverer worksheet enables you to view details about accommodations made for employees with disabilities across your organization.

Compliance (Person, United States Specific) Detail – OSHA Incidents (US)

This Discoverer worksheet enables you to view details associated with recorded OSHA incidents within your organization.

CPDF Dynamics Report (FD)

Record of the personnel data changes that occurred for the employee during a reporting period

CPDF Dynamics Report Transmittal Form (FD)

Transmittal form that accompanies the CPDF Dynamics Report

CPDF OCT Report Transmittal Form (FD)

Transmittal form that accompanies the Organization Component Tracking Report

CPDF Organization Component Tracking Report (FD)

Record of the organizational codes, titles, and hierarchical relationships for organizations within an agency as of the last day of the quarterly reporting period

CPDF Status Report (FD)

Record of each employee's personnel data as of the ending date of a fiscal quarter

CPDF Status Report Transmittal Form (FD)

Transmittal form that accompanies the CPDF Status Report

EEO-1 Reports (US)

The Equal Employment Opportunity reports include the EEO Individual Establishment Report, the EEO Headquarters Report, the EEO Establishment Employment Listing, the EEO Consolidated Report, and the EEO-1 Exception Report.

EEO4 Reports (US)

Run this report for state and local governments.

EEO5 Reports (US)

Run this report for the school system or district.

Electronic EEO-1 Report (US)

Generates Equal Employment Opportunity (EEO) reports for your establishment hierarchy formatted for submission on magnetic media.

Electronic EVS Report (US)

Generates an Employee Verification Service (EVS) report formatted for submission to the SSA office on diskette. The report is a list of employees showing social security number, full name, gender, and date of birth. The SSA compares the report with its own records and reports mismatches to the submitter.

Electronic VETS-100 Report (US)

Shows number of special disabled and Vietnam era veterans you employ in each of nine job categories. Also, show total number of new hires in each job category and number of new hires in each category who qualify as Vietnam era veterans.

Employee Equal Opportunity by Job (Multiple Hierarchies, United States Specific) Comparison – by Establishment Hierarchy (HRMSi)

The Establishment Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, location, and job name.

Employee Equal Opportunity by Job (Multiple Hierarchies, United States Specific) Comparison – by Organization Hierarchy (HRMSi)

The Organization Hierarchy worksheet enables you to report on the number of employee primary assignments (male, female, total) for your reporting establishments by ethnic origin, organization and job name.

Employee Equal Opportunity Exceptions (United States Specific) Detail – Employees Outside Establishment Hierarchy (US)

The Employees Outside an Establishment Hierarchy worksheet enables you to analyze which employees are at a location that is not in a defined Reporting Establishment Hierarchy, on a given effective date.

Employee Equal Opportunity Exceptions (United States Specific) Detail – Employees with Missing Equal Opportunity Data (US)

This Discoverer worksheet enables your organization to discover which employee primary assignments have missing Ethnic Origin information on a given effective date. For example, the report will show if an employee is missing data for employment category or ethnic origin.

Employee Equal Opportunity Exceptions (United States Specific) Detail – Employees Without a Location (US)

The Employees Without a Location Worksheet enables you to analyze which employee primary assignments are not assigned a location on a given effective date.

Employee Equal Opportunity for New Hires (Multiple Hierarchies, United States Specific) Detail – by Establishment Hierarchy (US)

This Discoverer worksheet enables you to list employee new hires within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Ethnic Origin, Hire Date, Age at Hire, Date Hired, Annual Salary, and Current Annual Salary. The list of employees is for a given establishment hierarchy.

Employee Equal Opportunity for New Hires (Multiple Hierarchies, United States Specific) Detail – by Organization Hierarchy (US)

This Discoverer worksheet enables you to list employee new hires within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Ethnic Origin, Hire Date, Age at Hire Date, Hired Annual Salary, and Current Annual Salary. The list of employees is for a given organization hierarchy.

Employee Equal Opportunity for Separations (Multiple Hierarchies, United States Specific) Detail – by Establishment Hierarchy (US)

The Establishment Hierarchy workbook enables you to report on employee separations for a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Gender, Hire Date, Actual Separation Date, and Separation Reason. The worksheet shows a list of employees for a given establishment hierarchy.

Employee Equal Opportunity for Separations (Multiple Hierarchies, United States Specific) Detail – by Organization (US)

This workbook enables you to report on employee separations within a given period. The workbook output includes the following employee primary assignment details: Job Name, Employee Number, Gender, Hire Date, Actual Separation Date, and Separation Reason. The worksheet shows a list of employees for a given Organization Hierarchy.

Employee Equal Opportunity with Salary (Multiple Hierarchies, United States Specific) Detail – by Establishment Hierarchy (US)

This Discoverer worksheet enables your organization to list employee primary assignment details including, Job Name, Employee Number, Gender, Ethnic Origin, Hire date and Salary. The list of employees is for a given Establishment Hierarchy.

Employee Equal Opportunity with Salary (Multiple Hierarchies, United States Specific) Detail – by Organization Hierarchy (US)

This Discoverer worksheet enables your organization to list employee primary assignment details including, Job Name, Employee Number, Gender, Ethnic Origin, Hire date and Salary. The list of employees is for a given Organization Hierarchy.

EO Survey Report (US)

Generates an Equal Opportunity (EO) Survey report for the specified reporting period and establishment hierarchy. The report shows, for full-time positions, numbers of applicants, hires, promotions, terminations, and employees. The report also shows annual monetary compensation and tenure data for full-time employees at the end of the reporting period.

French D2 Report (Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutiles de Guerre et Assimiles) (Payroll) (France)

A mandatory report that all establishments with more than 20 employee's must submit each year. It contains details about the number of people employed by the establishment who are disabled.

IPEDS Reports (Payroll) (US)

The Integrated Post-secondary Education Data System (IPEDS) reports are submitted to the National Center for Educational Statistics (NCES). The type of institution determines which reports you must run.

Mouvements de Main d'Oeuvre Report (Payroll) (France)

A mandatory report that must be produced by each establishment every month. It lists the people that have joined or left the establishment during that time.

OSHA Reports (US)

Report on work related injuries or illness.

Saudi Disabled Employee Report (SA)

The Saudi Disabled Employee Report creates a list of all the disabled employees in your organization.

SF-113A Federal Civilian Employment Report (FD)

Summary of federal civilian employment, payroll, and turnover

VETS-100 Reports (US)

Shows number of special disabled and Vietnam era veterans you employ in each of nine job categories. Also, show total number of new hires in each job category and number of new hires in each category who qualify as Vietnam era veterans.

Work Incidents Report (Germany)

The Work Incidents Report enables you to print out a formatted copy of the information entered in the Work Incidents window.

Recruiting and Hiring

Applicant Detail – Address (iRecruitment)

The Address Worksheet enables you to report on the addresses of your job applicants.

Applicant Detail – by Grade (iRecruitment)

The By Grade Worksheet enables you to report on the applicants who have applied to a specific grade. Grade Name is a page item on this worksheet so you can group your results by the grades for which your applicants have applied.

Applicant Detail – by Job (iRecruitment)

The By Job Worksheet enables you to report on the applicants that have applied for a specific job. Job Name is a page item on this worksheet so you can group your results by the jobs for which your applicants have applied.

Applicant Detail – by Location (iRecruitment)

The By Location Worksheet enables you to report on the applicants who have applied to a specific location. Location Name is a page item on this worksheet so you can group your results by the locations to which applicants have applied.

Applicant Detail – by Organization (iRecruitment)

The By Organization Worksheet enables you to report on the applicants who have applied to a specific organization. Organization Name is a page item on this worksheet so you can group your results by organization.

Applicant Detail – by Position (iRecruitment)

The By Position Worksheet enables you to report on the applicants who have applied for a specific position. Position Name is a page item on this worksheet so you can group your results by the positions for which your applicants have applied.

Applicant Detail – by Source Type (iRecruitment)

The By Source Type Worksheet enables you to report where applicants have indicated they saw the advertisement for your job. Source Type is a page item on this worksheet so you can group your results by the source type the applicant indicated.

Applicant Detail – by Vacancy (iRecruitment)

The By Vacancy worksheet enables you to report the applicants who have applied for a particular vacancy as of the date you select as your effective date. Vacancy Name is a page item on this worksheet so you can group your results by the vacancy for which the applicant has applied.

Applicant Detail – Competence (iRecruitment)

The Competence Worksheet enables you to report on the competencies your applicants have indicated they possess. Competencies are entered by your applicants as 'skills' as part of their account.

Applicant Detail – Detail (iRecruitment)

The Detail worksheet enables you to report on the details of your applicants based on the parameters you set for the report.

Applicant Detail – Phone (iRecruitment)

The Phone Worksheet enables you to report on the phone numbers of your job applicants.

Applicant Detail – Qualification (iRecruitment)

The Qualification Worksheet enables you to report on the qualifications your applicants have.

Applicant Detail – School College Attendance (iRecruitment)

The School College Attendance Worksheet enables you to report on the schools and colleges your job applicants have attended.

Applicant Efficiency (Hires – Manager Hierarchy) PMV report (iRecruitment)

This PMV report measures the average amount of time it takes to fill a vacancy, and also the average time from filling the vacancy to the employee starting, for employees starting in the selected reporting period, for hires within a hiring manager hierarchy.

Applicant Efficiency (Hires – Organization Hierarchy) PMV report (iRecruitment)

This PMV report measures the average amount of time it takes to fill a vacancy, and also the average time from filling the vacancy to the employee starting, for employees starting in the selected reporting period, for hires within an organization hierarchy.

Applicant Fill to Start (Hires – Manager Hierarchy) PMV report (iRecruitment)

This PMV report measures the days between the date that the vacancy was filled and the date on which the successful applicant becomes an employee for employees starting in the reporting period, for hires within a hiring manager hierarchy.

Applicant Fill to Start (Hires – Organization Hierarchy) PMV report (iRecruitment)

This PMV report measures the days between the date that the vacancy was filled and the date on which the successful applicant becomes an employee for employees starting in the reporting period, for hires within an organization hierarchy.

Applicant Time to Fill (Manager Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of days between the start date of the vacancy and the date upon which the vacancy is filled for employees starting in the reporting period for vacancies that are filled in the reporting period, within a hiring manager hierarchy.

Applicant Time to Fill (Organization Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of days between the start date of the vacancy and the date upon which the vacancy is filled for employees starting in the reporting period for vacancies that are filled in the reporting period, within an organization hierarchy.

Applicant Time to Start (Manager Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for employees starting in the reporting period, within a hiring manager hierarchy.

Applicant Time to Start (Organization Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for employees starting in the reporting period, within an organization hierarchy.

Applicant Time to Start Comparison – by Ethnic Origin (United States Specific) (HRMSi) (US)

This worksheet analyses the days required to fill vacancies within a recruitment activity for ethnic groups in the United States.

Applicant Time to Start Comparison – by Ethnic Origin (United Kingdom Specific) (HRMSi) (UK)

This worksheet analyses the days required to fill vacancies within a recruitment activity for ethnic groups in the United Kingdom.

Applicant Time to Start Comparison – by Gender (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by gender.

Applicant Time to Start Comparison – by Grade (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by grade.

Applicant Time to Start Comparison – by Job (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by job.

Applicant Time to Start Comparison – by Location (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by location.

Applicant Time to Start Comparison – by Organization (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by organization.

Applicant Time to Start Comparison – by Vacancy (HRMSi)

This worksheet analyses the days required to fill vacancies within a recruitment activity by vacancy.

Application Status – Age Analysis (HRMSi)

This worksheet enables you to investigate the current age of applicants for a particular vacancy.

Application Status – Applicant Statuses (HRMSi)

This worksheet enables you to investigate the applications that exist for a Business Group, requisition, and recruiter.

Application Status – Recruitment Activity Summary (HRMSi)

This worksheet enables you to investigate recruitment activities within your Business Group. You can analyze the current status of recruitment activities, for example, the number of new applicants, the number of offers made, and the number of terminated applicants. You can view recruitment activity information for a Business Group, requisition, vacancy, and recruitment type.

Application Status – Vacancy Summary (HRMSi)

This worksheet enables you to investigate vacancies within your Business Group. You can analyze the current status of vacancies, for example, the number of remaining applicants, the number of new applicants, and the number of terminated applicants. You can view vacancy information for a Business Group, recruitment type, and recruitment activity.

Application Termination Detail – Termination Details

This Worksheet investigates the reasons your enterprise has terminated applications.

Application Termination Detail – Termination Reasons by Vacancy

This Worksheet investigates the reasons why job applicants have terminated applications within your enterprise.

Candidate Detail – Address (iRecruitment)

The Address Worksheet enables you to report on the addresses of your candidates.

Candidate Detail – Competency (Skill) (iRecruitment)

The Competency (Skill) Worksheet enables you to report on the competencies of your candidates. It also includes their level of proficiency. Competencies are entered by your candidates as 'skills' as part of their account

Candidate Detail – Education (iRecruitment)

The Education Worksheet enables you to report on which schools and colleges your candidates have attended and the qualifications they have achieved.

Candidate Detail – Employment History (iRecruitment)

The Employment History Worksheet enables you to report on the previous and current employers of your candidates.

Candidate Detail – Job Search Views (iRecruitment)

The Job Search Views Worksheet enables you to report on the saved job searches your candidates have set up.

Candidate Detail – Personal Detail (iRecruitment)

The Personal Detail Worksheet enables you to report on the details that your candidates have entered as part of their iRecruitment account.

Candidate Detail – Phone (iRecruitment)

The Phone Worksheet enables you to report on the phone numbers of your candidates.

Candidate Detail – Qualification (iRecruitment)

The Qualification Worksheet enables you to report on the level of qualifications that your candidates have.

Job Posting Content – Posting Detail (iRecruitment)

The Posting Detail worksheet enables you to report on the details of the job postings that have been created for your vacancies; for example, job title, job description, and job requirements.

Recruitment by Authorizer Analysis – Average Days to Recruit by Organization (HRMSi, EDW)

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire; average values for both measures are given for each organization and overall. This information is reported for each recruitment authorizer within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Recruitment by Authorizer Analysis – Average Days to Recruit by Stage and Job Category (HRMSi, EDW)

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Recruitment by Authorizer Analysis – Average Days to Recruit by Stage and Job (HRMSi, EDW)

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruitment authorizer, during a specified calendar year (the year the applicant was hired).

Recruitment by Authorizer Analysis – Average Days to Recruit Over Time (HRMSi, EDW)

The Average Days to Recruit Over Time worksheet measures the average number of days from both vacancy start date to hire and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruitment authorizer within a specified top-level employing organization.

Recruitment by Authorizer Analysis – Average Days to Recruit (HRMSi, EDW)

The Average Days to Recruit worksheet measures the average number of days from both the vacancy start date to hire and the application date to hire; average values for both measures are also shown. This information is given for each recruitment authorizer within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

Recruitment by Authorizer Analysis – Vacancy Activity (HRMSi, EDW)

The Vacancy Activity worksheet provides information for a specified authorizer on the status of each vacancy. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Recruitment by Recruiter Analysis – Average Days to Recruit by Organization (HRMSi, EDW)

The Average Days to Recruit by Organization worksheet measures both the average number of days from the vacancy start date to hire and from the application date to hire;

average values for both measures are given for each organization and overall. This information is reported for each recruiter within all top-level employing organizations during a specific calendar year (the year the applicant was hired).

Recruitment by Recruiter Analysis – Average Days to Recruit by Stage and Job Category (HRMSi, EDW)

The Average Days to Recruit by Stage and Job Category worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job category and each recruiter, during a specified calendar year (the year the applicant was hired).

Recruitment by Recruiter Analysis – Average Days to Recruit by Stage and Job (HRMSi, EDW)

The Average Days to Recruit by Stage and Job worksheet measures the average number of days from the start of the application to each recruitment stage (end of application, first interview, second interview, offer, acceptance, and hire). This is reported for each job and for a specified recruiter, during a specified calendar year (the year the applicant was hired).

Recruitment by Recruiter Analysis – Average Days to Recruit Over Time (HRMSi, EDW)

The Average Days to Recruit Over Time worksheet measures the average number of days from both vacancy start date to hire and application date to hire, for the past three calendar years and the current calendar year; average values for both measures are also given. This information is reported for each recruiter within a specified top-level employing organization.

Recruitment by Recruiter Analysis – Average Days to Recruit (HRMSi, EDW)

The Average Days to Recruit worksheet measures the average number of days from both the application date to hire and the vacancy date to hire; average values for both measures are also shown. This information is given for each recruiter within a specified top-level employing organization during a specified calendar year in which the applicant was hired.

Recruitment by Recruiter Analysis – Vacancy Activity (HRMSi, EDW)

The Vacancy Activity worksheet provides information for a specified recruiter on the status of each vacancy within a specified period. It reports the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Recruitment Efficiency Comparison – Hires vs. Openings Summary (HRMSi)

This worksheet shows the rate of hires in your organization compared to job openings.

Recruitment Efficiency Comparison – Recruitment Activity Ratios (HRMSi)

This worksheet investigates the cost of your recruitment activities.

Recruitment Efficiency Comparison – Vacancy Ratios by Recruitment Activity (HRMSi)

This worksheet investigates how successful specific recruitment activities have been.

Recruitment Efficiency Comparison – Vacancy Ratios (HRMSi)

This worksheet investigates how successful your recruitment has been.

Recruitment Success Report (HRMSi)

This report provides a trend analysis showing the changes in recruitment success over a selected period of time. You can analyze the total number of openings recorded for vacancies, the total number of openings that have been filled, and the Performance Management Framework recruitment success targets.

Requisition Summary Report

Applicants and their interview schedules for a selection of vacancies.

Vacancy Ageing (Manager Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of days between the start of the vacancy and the current date, for vacancies within a hiring manager hierarchy.

Vacancy Ageing (Organization Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of days between the start of the vacancy and the current date, for vacancies within an organization hierarchy.

Vacancy Detail – by Grade (iRecruitment)

The By Grade worksheet enables you to report on the vacancies that exist with a specific grade. Grade Name is a page item on this worksheet so you can group your results by the vacancy grade.

Vacancy Detail – by Hiring Manager (iRecruitment)

The By Hiring Manager worksheet enables you to report on the vacancies associated with each hiring manager. Hiring Manager Name is a page item on this worksheet so you can group your results by vacancy hiring manager.

Vacancy Detail – by Job (iRecruitment)

The By Job worksheet enables you to report on the vacancies that exist for a specific job. Job Name is a page item on this worksheet so you can group your results by the vacancy job.

Vacancy Detail – by Location (iRecruitment)

The By Location worksheet enables you to report on the vacancies available at each location. Location Name is a page item on this worksheet so you can group your results by the location of the vacancy.

Vacancy Detail – by Organization (iRecruitment)

The By Organization worksheet enables you to report on the vacancies that are available in each of your organizations.

Vacancy Detail – by Position (iRecruitment)

The By Position worksheet enables you to report on the vacancies that exist for a specific position. Position Name is a page item on this worksheet so you can group your results by vacancy position.

Vacancy Detail – by Recruiter (iRecruitment)

The By Recruiter worksheet enables you to report on the vacancies associated with each recruiter. Recruiter Name is a page item on this worksheet so you can group your results by vacancy recruiter.

Vacancy Detail – by Vacancy Status (iRecruitment)

The By Vacancy Status worksheet enables you to report on the vacancies with each vacancy status. Vacancy Status is a page item on this worksheet so you can group your results by vacancy status.

Vacancy Detail – Detail (iRecruitment)

The Detail Worksheet enables you to report on the details of the vacancies in your organization hierarchy.

Vacancy Hire Success (Organization Hierarchy) Template Analytics by Year (HRMSi)

This worksheet enables you to see vacancy success for each year. The template worksheets provide a starting point for developers to create analytic reports.

Vacancy Hire Success (Organization Hierarchy) Template Analytics Detail (HRMSi)

This worksheet calculates the vacancy success rates for vacancies with the same opening and closing dates, for each organization, location, job, grade, and position. The template worksheets provide a starting point for developers to create analytic reports.

Vacancy Status (System Defaults – Manager Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of vacancies at each vacancy status as of the current date, within a hiring manager hierarchy. These reports only include the vacancy statuses supplied with the application. Any vacancy statuses you have added will not be taken into account by these reports.

Vacancy Status (System Defaults – Organization Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the number of vacancies at each vacancy status as of the current date, within an organization hierarchy. These reports only include the vacancy statuses supplied with the application. Any vacancy statuses you have added will not be taken into account by these reports.

Vacancy Success (Organization Hierarchy) Trend Analytics By Bi Month (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by bimonthlies.

Vacancy Success (Organization Hierarchy) Trend Analytics By Month (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by months.

Vacancy Success (Organization Hierarchy) Trend Analytics By Quarter (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by quarters.

Vacancy Success (Organization Hierarchy) Trend Analytics By Semi Year (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by semi-years.

Vacancy Success (Organization Hierarchy) Trend Analytics By Year (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success over a selected period of time group by years.

Vacancy Success (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success across geographical areas.

Vacancy Success (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet provides a trend analysis showing the changes in vacancy success across organizations in your enterprise.

Vacancy Time from Fill to Start (Manager Hierarchy) Status (iRecruitment)

This PMV report measures the average number of days between filling a vacancy and the employee starting, for vacancies that started in the reporting period, and vacancies within a hiring manager hierarchy.

Vacancy Time from Fill to Start (Organization Hierarchy) Status (iRecruitment)

This PMV report measures the average number of days between filling a vacancy and the employee starting, for vacancies that started in the reporting period, and vacancies within an organization hierarchy.

Vacancy Time to Start (Manager Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for vacancies that start in the reporting period, and vacancies within a hiring manager hierarchy.

Vacancy Time to Start (Organization Hierarchy) Status PMV report (iRecruitment)

This PMV report measures the average number of days between the start of the vacancy and the date upon which the successful applicant becomes an employee, for vacancies that start in the reporting period, and vacancies within an organization hierarchy.

Workforce Recruitment Stage Analysis – Average Days to Recruit by Stage and Job Category (HRMSi, EDW)

The Average Days to Recruit by Stage and Job Category worksheet provides recruitment information for each job category in a top-level employing organization within a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

Workforce Recruitment Stage Analysis – Average Days to Recruit by Stage and Job (HRMSi, EDW)

The Average Days to Recruit by Stage and Job worksheet provides recruitment information for each job (for example, Line Manager or Sales Person) in a top-level employing organization within a specified calendar year. You can report on the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

Workforce Recruitment Stage Analysis – Efficiency (Average Days) (HRMSi, EDW)

The Efficiency (Average Days) worksheet provides information concerning the recruitment efficiency of each top-level employing organization for a specified calendar year. It reports the average number of days from application to termination (the date the application was ended by the employer or applicant), first interview, second interview, offer, acceptance, and hire.

Workforce Recruitment Stage Analysis – Recruitment by Age Band (HRMSi, EDW)

The Recruitment by Age Band worksheet provides a recruitment summary by age band for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

Workforce Recruitment Stage Analysis – Recruitment by Disability Status (HRMSi, EDW)

The Recruitment by Disability Status worksheet provides a recruitment summary by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

Workforce Recruitment Stage Analysis – Recruitment by Gender (HRMSi, EDW)

The Recruitment by Gender worksheet provides a recruitment summary by gender for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

Workforce Recruitment Stage Analysis – Recruitment by Location (HRMSi, EDW)

The Recruitment by Location worksheet provides a recruitment summary by location for a selected top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

Workforce Recruitment Stage Analysis – Recruitment by Organization (HRMSi, EDW)

The Recruitment by Organization worksheet provides a recruitment summary for a specified top-level employing organization. You can report on the following measures: head count, full time equivalent, average number of days between application and hire for each assignment by organization and year, and average number of days between vacancy start and hire for each assignment by organization and year.

Workforce Recruitment Stage Analysis – Vacancy Activity by Job (HRMSi, EDW)

The Vacancy Activity by Job worksheet provides information for a specified top-level employing organization and job on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

Workforce Recruitment Stage Analysis – Vacancy Activity (HRMSi, EDW)

The Vacancy Activity worksheet provides information for a specified top-level employing organization on the status of each vacancy; for example, the number of openings, vacancy start and end dates, the number of applicants at each recruitment stage, the average days from vacancy start and application to hire, and the number of openings remaining.

People Management

Annualized Turnover (HRMSi, DBI)

This report displays the annualized employee headcount turnover for the selected top line manager.

Annualized Turnover Status (HRMSi, DBI)

The report displays the percentage-annualized turnover for the top line manager. You access this report from the Total column in the Annualized Turnover report.

Annualized Turnover Trend (HRMSi, DBI)

This report shows changes in the annualized employee headcount turnover over time for the selected top line manager. The report categorizes turnover into voluntary and involuntary separations.

Assignment Status Report

All employees, applicants or both assigned to selected work structures.

Company Certificate Report (Spain)

Contains the personal, employment, and social security information of an employee who is terminated or on leave such as maternity leave or leave due to suspended assignment.

Employee Anniversary and Birthday (Multiple Hierarchies) Detail – by Organization Hierarchy

The Organization Hierarchy worksheet allows you to report on employee anniversaries (total service) and birth date (in the format DD-MON). Employees are listed by organization. Total and current service calculations are in respect of the system date (SYSDATE).

Employee Anniversary and Birthday (Multiple Hierarchies) Detail – by Supervisor Hierarchy

The Supervisor Hierarchy worksheet enables you to report on employee anniversaries (total service) and birth date (in the format DD-MON).

Employee by Supervisor (Multiple Hierarchies) Status – by Organization Hierarchy

The Organization Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees, by organization.

Employee by Supervisor (Multiple Hierarchies) Status – by Supervisor Hierarchy

The Supervisor Hierarchy worksheet enables you to report on the supervisor hierarchy and salary details for your employees by supervisor.

Employee Composition Detail – by Assignment Details

This worksheet enables you to analyze workforce assignment details by organization, job, position, or grade.

Employee Composition Detail – by Salary Band

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Employee Composition Detail – by Time In Service Band

This worksheet enables you to analyze the distribution of employees within an organization by length of service.

Employee Hired or Terminated Detail for Organization Hierarchy

This worksheet enables you to report on employees who terminated or were hired within two specified dates for a given organization and its subordinate organizations.

Employee Mailing Address (Multiple Hierarchies, United States Specific) Detail – by Organization Hierarchy (US)

The Organization Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given organization and its subordinate organizations.

Employee Mailing Address (Multiple Hierarchies, United States Specific) Detail – by Supervisor Hierarchy (US)

The Supervisor Hierarchy worksheet enables you to report on employee current primary addresses in a United States legislation specific address format, for a given supervisor and his/her subordinates.

Employee Mailing Address (Multiple Hierarchies) Detail – by Organization Hierarchy

This Worksheet enables you to report on current employee primary addresses in a non-legislative specific address format, for a given organization and its subordinate organizations.

Employee Mailing Address (Multiple Hierarchies) Detail – Supervisor Hierarchy

This Worksheet enables you to report on current employee primary addresses in a non-legislative specific address format, for a given supervisor and his/her subordinates.

Employee Movement by Organization Analysis – Hires

This worksheet displays hire information in detail. The worksheet enables you to analyze hire information by job, position, assignment, or location. It enables you to analyze hire trends within an organization, and analyze skills required within an organization.

Employee Movement by Organization Analysis – Hires, Terminations and Transfers by Quarter (HRMSi)

This worksheet enables you to view high-level information about the value of hires, terminations, and transfers in all organizations within your Business Group, by year quarter. The resulting information allows you to analyze workforce changes by quarter, and compare workforce change across all organizations within a Business Group.

Employee Movement by Organization Analysis – Terminations

This worksheet enables you to analyze terminations within your organizations in detail. For each termination you can: Analyze employee termination across all organizations within a Business Group.

Employee Movement by Organization Analysis – Transfers In

This worksheet enables you to investigate the total budget value of people transferring into different organizations in your Business Group. For each transfer you can analyze the organization transferred from, the location transferred from, and the position/job transferred from.

Employee Movement by Organization Analysis – Transfers Out

This worksheet investigates the total budget value of people transferring out of different organizations in your Business Group. For each transfer out you can analyze the organization transferred to, the location transferred to, and the position/job transferred to.

Employee Organization Transfer (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employee primary assignment organization transfers during a given period for a given organization and its subordinate organizations. The worksheet output includes the employee primary assignment details before and after the transfer, including job name, organization name, and supervisor name.

Employee Organization Transfer (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employee primary assignment organization transfers during a given period for a given supervisor and his/her subordinates. The worksheet output includes the employee primary assignment details before and after the transfer, including job name, organization name, and supervisor name.

Employee Primary Assignment (Multiple Hierarchies) Detail – by Organization Hierarchy

The Organization Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for each organization and for subordinate organizations.

Employee Primary Assignment (Multiple Hierarchies) Detail – by Supervisor Hierarchy

The Supervisor Hierarchy worksheet enables you to report on basic employee details by employee primary assignment. Employees are listed for a given Supervisor and his/her subordinates.

Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison – by Organization Hierarchy (HRMSi)

The Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given organization. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison – by Supervisor Hierarchy (HRMSi)

The Supervisor Hierarchy worksheet enables you to calculate employee primary assignment numbers by location for a given supervisor. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Employee Primary Assignment Count (by Location and Employment Category, Multiple Hierarchies) Comparison – by Without Organization Hierarchy (HRMSi)

The Without Organization Hierarchy worksheet enables you to calculate employee primary assignment numbers by location without using organization or supervisor hierarchies. You can use the worksheet parameters to include specific assignment statuses or exclude particular person types to suit your requirements.

Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison – by Organization Hierarchy (HRMSi)

The Organization Hierarchy worksheet enables you to report on employee primary assignment numbers for a given organization. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison – by Organization Hierarchy (Rollup) (HRMSi)

The Organization Hierarchy (Rollup) worksheet allows you to report on employee primary assignment numbers by Organization Rollup for a given organization. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Employee Primary Assignment Count (by Organization and Employment Category, Multiple Hierarchies) Comparison – by Supervisor Hierarchy (HRMSi)

The Supervisor Hierarchy worksheet enables you to report on employee primary assignment numbers by organization for a given supervisor. The worksheet parameters enable you to customize the worksheet output to suit your own requirements; for example, you can choose assignment types to include or person types to exclude from the worksheet.

Employee Separation (Organization Hierarchy) Template Analytics by Year, Organization and Separation Category (HRMSi)

This investigates separations from the workforce for different organizations and different leaving reasons over yearly periods. The template worksheets provide a starting point for developers to create analytic reports.

Employee Separation (Organization Hierarchy) Template Analytics Details (HRMSi)

This worksheet tells you how separations from your workforce vary across different groups within your organization, such as organization, job, and location. For any date, you can see how many separations have occurred within each organization, location, job, grade, position, separation category, and separation reason. The template worksheets provide a starting point for developers to create analytic reports.

Employee Separation by Competence (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet compares employee competencies to separations across geographical areas.

Employee Separation by Competence (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet compares employee competencies to separations across organizations.

Employee Separation by Competence (Organization Hierarchy) Status Analytics by Rank Level (HRMSi)

This worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific rank level.

Employee Separation by Competence (Organization Hierarchy) Status Analytics by Scale Level (HRMSi)

This worksheet enables you to see the number of people who have separated from the workforce who hold competencies at a specific scale level.

Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet compares employees' competencies, to the rate of separation, grouped by bimonthlies.

Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet compares employees' competencies to the rate of separation, grouped by months.

Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet compares employees' competencies to the rate of separation, grouped by quarters.

Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet compares employees' competencies, to the rate of separation, grouped by semi-years.

Employee Separation by Competence (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet compares employees' competencies, to the rate of separation, grouped by years.

Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet compares employees' length of service within each geographical area.

Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet compares employees' length of service within each organization.

Employee Separation by Length of Work (Organization Hierarchy) Status Analytics by Separation Category & Reason (HRMSi)

This worksheet compares the length of service of employees who have separated from your enterprise, grouped by separation category and reason.

Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each bimonthly.

Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each month.

Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each quarter.

Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each semi-year.

Employee Separation by Length of Work (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet compares the amount of time people have been with your enterprise, to the separation rate over time, within each year.

Employee Separation by Reason (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet investigates the different reasons for separations within geographical areas. You can determine if employees in different areas leave your enterprise for different reasons.

Employee Separation by Reason (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet investigates the different reasons for separations within organizations. You can determine if employees in different organizations leave your enterprise for different reasons.

Employee Separation by Reason (Organization Hierarchy) Status Analytics by Separation Category (HRMSi)

This worksheet investigates the different reasons employees leave your enterprise within each separation category.

Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by bimonthly.

Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by month.

Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by quarter.

Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by semi-year.

Employee Separation by Reason (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet enables you to investigate the different reasons why your enterprise is losing workforce over time, grouped by year.

Employee Summary Report

Addresses, contacts, periods of service, assignments, special information, personal payment methods and element entries for a selected employee.

Employee Termination (Organization Hierarchy) Detail – Detail

This worksheet enables you to report on employees that have separated within a specified time period. Employees are listed for a given organization and its subordinate organizations.

Employee Termination with Comments (Organization Hierarchy) Detail – Detail

This worksheet enables you to report on the employees that have separated within a specified time period. Employees are listed for a given organization and its subordinate organizations.

Employment Certification Report (Hungary)

Contains the personal, job, and pension information of a terminated employee.

Employment Equity Report

Outlines the required information needed for the Employment Equity report required by Canadian Employment Equity Act.

Employment Equity Templates (Payroll) (South Africa)

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

Employment Equity Workforce Profile Report (Payroll) (South Africa)

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

Full Applicant Details

Applications and applicant interviews for one applicant.

Full Assignment Details

Assignment information including periods of service, payment methods, and element entries for one employee.

Full Person Details

Addresses and information entered in the Person window such as name, date of birth, nationality and work telephone number for one employee.

Full Personal Details Report Set

Person details, applicant details, assignment details and work details for one employee.

Full Work Details

Miscellaneous work information including special information, absences, recruitment activities and contacts for one employee.

Head Count Detail Report

The number and type of workers within an organization, as well as attrition rate data.

Headcount (HRMSi, DBI)

This report displays the total employee headcount of the direct reports of the selected top line manager.

Headcount by Country Trend (HRMSi, DBI)

This report shows changes in headcount over time for the four countries with the highest head count for the selected top line manager.

Headcount Transfer (Plus) Detail (HRMSi, DBI)

The report displays the employee records that comprise the total value you drilled from in the head count report, including transfers and reorganizations. You access this report from the Plus-Transfer column in the parent head count report.

Headcount Hire Detail (HRMSi, DBI)

This report lists the records that comprise the Plus-Hire value you drilled from in the Headcount report, including hires, re-hires and secondary assignment starts. You access this report from the Plus-Hire column in the Headcount report.

Headcount Termination Detail (HRMSi, DBI)

The report displays the employee records that make up the total value you drilled from in the Headcount report. The report lists employees who have terminated from the manager's hierarchy in the given period, together with supporting details.

Headcount Transfer (Minus) Detail (HRMSi, DBI)

The report displays the employee records that comprise the total value you drilled from the Headcount report, including transfers and reorganizations. The report provides information about employees who have moved out of the selected manager's hierarchy.

HRMS Profile Options Report

Use this report to list the values of the profile options for your HRMS installation. The report also identifies which profile options have not been set for your installation.

Human Resource Setup Detail – Employee Anniversary Birthdays

This worksheet enables you to view employee birthdays and start dates. The worksheet also enables you to view other employee information, for example, length of service, employee number, and supervisor name.

Human Resource Setup Detail – Employee Assignment by Organization

This worksheet enables you to report on the assignments within an organization, by choosing a top organization and including subordinates.

Human Resource Setup Detail – Employee Assignment by Organization Rollup

This worksheet enables you emulate the rollup flexibility of HRMSi Reports by using an organization hierarchy to control the information displayed.

Human Resource Setup Detail – Employee Job History

This worksheet enables you to view employee job history across your organization.

Human Resource Setup Detail – Employee List with Length of Work

This worksheet enables you to analyze deployment factors associated with positions, people in specific positions, and position applicants.

Human Resource Setup Detail – Employee Separation with Equal Opportunity (United States Specific)

This worksheet enables you to analyze terminations with ethnic origin over a specific time period.

Human Resource Setup Detail – Person Home Address

This worksheet enables you to view the primary addresses of employees.

Invalid Address Report

Lists employee address information inconsistencies.

Invalid Address Report (US)

Lists employee address information inconsistencies. In addition, identifies addresses that do not comply with SSA MMREF-1 standards or that have address lines longer than a user-specified length.

Law SAMEN Report (Organization Structure) and Law SAMEN Report (Dutch Region) (Netherlands)

The Law SAMEN report (Organization Structure) reports on employees within an organization structure. The Law SAMEN Report (Dutch Region) reports on employees within a specific Dutch region.

National Defense Report (Hungary)

Contains a list of male employees who are available to perform a national defense role.

New Hire State Magnetic Media Report (US)

Report on newly hired and rehired employees using magnetic media.

New Hire State Report (US)

Report on newly hired or rehired employees.

Period of Service Reports (Germany)

Generates reports of an employee's periods of service using selected criteria.

Person/Assignment History Detail – Application

This worksheet enables you to analyze an applicant's assignment record between the start and end of an application. For each employee you can examine the total number of applications, the number of successful applications, and the length of time between different application stages.

Person/Assignment History Detail – Employee Separation

This worksheet enables you track termination reasons by type, date, and length of service, allowing you to spot trends among leavers. For each termination, you can compare termination reasons to discover trends, and compare the length of time in an organization against time in a job.

Person/Assignment History Detail – Person Assignment

This worksheet enables you to analyze an employee's assignment history between specific dates. For each employee you can examine the current assignment, and details of previous assignments.

Person Full History Report

This report lists the personal and professional details of the employees and contingent workers in your enterprise, including assignments, salary, and contact details.

Person Synchronization Report

This report shows details of any person in your current business group who also has a record in another business group on the specified date.

RED System : New Hires, Leavers, and Contract Changes Report (Spain)

This report contains information about the workforce and contract changes within an enterprise.

Saudi Contract Expiry Report (SA)

The Saudi Contract Expiry Report creates a list of all the contracts that will expire in a user specified period of time.

Saudi Iqama Expiry Report (SA)

The Saudi Iqama Expiry Report creates a list of all the iqamas that will expire in a user specified period of time.

Saudi Passport Expiry Report (SA)

The Saudi Passport Expiry Report creates a list of all the passports that will expire in a user specified period of time.

Separations By Competence Report (HRMSi)

This report is run from the Separations by Leaving Reason report. When employees leave your enterprise you lose the competencies they possess. This can become a problem if you continue to lose people with the same abilities. This report investigates the competencies and levels of proficiency you are losing.

Separations By Leaving Reason Report (HRMSi)

This report is run from the Workforce Losses report. This report enables you to investigate the different reasons why your enterprise is losing workforce. It only includes the workforce that has left your enterprise. It does not include workforce that has transferred to a different area of your enterprise or assignments that have ended or been suspended.

Separations By Service Bands Report (HRMSi)

This report is run from the Separations by Leaving Reason report. This report investigates the relationship between the reasons people give for leaving and the amount of time they have been with your enterprise.

Separations Trend by Leaving Reason Report (HRMSi)

Use this report to investigate the trends in why people are leaving your enterprise. This report runs from the Workforce Losses report.

Separations Trend by Service Band Report (HRMSi)

Use this report to investigate the trends in the length of time employees remain with your enterprise. This report runs from the Workforce Losses report.

Social Health Insurance Report (Netherlands)

Employees who have started and/or ended the social health insurance within a date range.

Tenure Notification Reports (including Tenured Status, Non-Tenured Status, Tenure Track Status and Tenure Review) (US)

These notification reports are available for you to send to faculty members and their academic manager during the Tenure process

Terminations Report

The number of employees from selected organizations leaving your enterprise within a particular period, and the reason for leaving.

Terminations with Active Support Order Report (US)

Run this report to view employees with an active support order at the time of termination.

Turnover Detail (HRMSi, DBI)

This report lists the ex-employees who comprise the value you drilled from the Annualized Turnover Status report. The report is the sum of the headcount of assignment ends that occur at the same time as a termination.

Worker Organization Movements Report

New starters, terminations, transfers in, and transfers out of a selected organization or organization hierarchy.

Workforce Assignment Activity Analysis – Grade Changes (HRMSi, EDW)

The Grade Changes worksheet provides a summary of the head count or full time equivalent, or the average number of months between grade changes, for a specified top-level employing organization within a particular calendar year, for employees changing grade.

Workforce Assignment Activity Analysis – Location Changes (HRMSi, EDW)

The Location Changes worksheet provides a summary of the head count or full time equivalent for people changing locations for a specified top-level employing organization within a specified calendar year.

Workforce Assignment Activity Analysis – Organization Changes (HRMSi, EDW)

The Organization Changes worksheet provides a summary of the head count or full-time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

Workforce Comparison Report (HRMSi)

The workforce assigned to different types of jobs can vary over time. This report compares the workforce assigned to up to three job categories over time. For example, you could compare the number of managers against the number of technical staff you employed last year.

Workforce Composition Analysis – Composition by Age Band (HRMSi, EDW)

The Composition by Age Band worksheet provides a summary of person head count or full-time equivalent by employee age band for a specified top-level employing

organization and a specified period of time. All workforce composition data collected in that period will be included.

Workforce Composition Analysis – Composition by Disability Status (HRMSi, EDW)

The Composition by Disability Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a specified top-level employing organization within a specified period of time. All workforce composition data collected in that period will be included.

Workforce Composition Analysis – Composition by Gender (HRMSi, EDW)

The Composition by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a specified top-level employing organization and a specified period of time. All workforce composition data collected in that period will be included.

Workforce Composition Analysis – Composition by Location (HRMSi, EDW)

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization within a specified period of time. All workforce composition data collected in that period will be included.

Workforce Composition Analysis – Composition by Period of Service (HRMSi, EDW)

The Composition by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a specified top-level employing organization and a specified period of time. All workforce composition data collected in that period will be included.

Workforce Composition Analysis – Composition Summary (HRMSi, EDW)

The Composition Summary worksheet provides a summary of person head count or full-time equivalent for top-level employing organizations and for a specified period of time. All workforce composition data collected within that period will be included.

Workforce Count (Organization Hierarchy) Template Analytics by Year (HRMSi)

This worksheet analyses how your workforce fluctuates over time. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Count (Organization Hierarchy) Template Analytics Detail (HRMSi)

This worksheet tells you how your workforce fluctuates across different groups within your organization, such as organization, job, and location. You view the detail for one year at a time. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Count (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by bimonthlies.

Workforce Count (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by months.

Workforce Count (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by quarters.

Workforce Count (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by semi-years.

Workforce Count (Organization Hierarchy) Trend Analytics by Year and Geography (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by year and geography.

Workforce Count (Organization Hierarchy) Trend Analytics by Year and Organization (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by year and organization.

Workforce Count (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce for each time period within the given date range grouped by years.

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each bimonthly within the given date range.

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each month within the given date range.

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each quarter within the given date range.

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each semi-year within the given date range.

Workforce Count by Job Category (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, for each year within the given date range.

Workforce Count Change (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by geographical area.

Workforce Count Change (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by organization.

Workforce Count Change (Organization Hierarchy) Status Analytics by Separation Category (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce grouped by separation category.

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by geographical area.

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Grade (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by grade.

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Job (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by job.

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by organization.

Workforce Count Change by Job Category (Organization Hierarchy) Status Analytics by Position (HRMSi)

This worksheet calculates the Workforce Measurement Value (Head Count or FTE) of your workforce, broken down by job category, and grouped by position.

Workforce Count KPI Status (HRMSi)

This Performance Management Viewer report provides you with a view of the Workforce Full Time Equivalent and Workforce head count KPI data, including target and actual values. The report displays table data by default; you can optionally display the data as a chart.

Workforce Count Report

The number and type of workers within an organization, as well as attrition rate data, in summary form.

Workforce Count Report (Spread Sheet Version)

The number and type of workers within an organization, as well as attrition rate data, in summary form. This version of the workforce count reports enables you to open the report in a spreadsheet format.

Workforce Gain (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet lists the total losses that occurred within a given time period, grouped by geographical area.

Workforce Gain (Organization Hierarchy) Status Analytics by Grade (HRMSi)

This worksheet lists the total losses that occurred within a given time period, grouped by organization.

Workforce Gain (Organization Hierarchy) Status Analytics by Job (HRMSi)

This worksheet lists the total losses that occurred within a given time period, grouped by job.

Workforce Gain (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet lists the total losses that occurred within a given time period, grouped by organization.

Workforce Gain (Organization Hierarchy) Status Analytics by Position (HRMSi)

This worksheet lists the total losses that occurred within a given time period, grouped by grade.

Workforce Gain (Organization Hierarchy) Template Analytics by Year and Organization (HRMSi)

This worksheet analyses how workforce gains have occurred, and compares the gains over time and across organizations. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Gain (Organization Hierarchy) Template Analytics Detail (HRMSi)

This worksheet tells you how the gains occurred and how the gains have been deployed within the workforce. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Gain (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet lists the total gains that occurred within a given date range grouped by bimonthlies.

Workforce Gain (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet lists the total gains that occurred within a given date range grouped by months.

Workforce Gain (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet lists the total gains that occurred within a given date range grouped by quarter years.

Workforce Gain (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet lists the total gains that occurred within a given date range grouped by semi-years.

Workforce Gain (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet lists the total gains that occurred within a given date range grouped by years.

Workforce Gains Report (HRMSi)

Organizations within your enterprise may be gaining workforce for different reasons. This report investigates whether your workforce is increasing because of any of the following reasons: new employees are being hired by your enterprise, existing employees are being given new assignments in different parts of your enterprise, existing employees are transferring assignments to different parts of your enterprise, or employees' assignments are being re-activated from suspended to active.

Workforce Loss (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet lists the total losses within a given time period, grouped by geographical area.

Workforce Loss (Organization Hierarchy) Status Analytics by Grade (HRMSi)

This worksheet lists the total losses within a given time period, grouped by grade.

Workforce Loss (Organization Hierarchy) Status Analytics by Job (HRMSi)

This worksheet lists the total losses within a given time period, grouped by job.

Workforce Loss (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet lists the total losses within a given time period, grouped by organization.

Workforce Loss (Organization Hierarchy) Status Analytics by Position (HRMSi)

This worksheet lists the total losses within a given time period, grouped by Position.

Workforce Loss (Organization Hierarchy) Template Analytics by Year and Organization (HRMSi)

This worksheet analyses when and where workforce gains occur, and compares the gains over time and across organizations. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Loss (Organization Hierarchy) Template Analytics Detail (HRMSi)

This worksheet tells you how losses occurred and where losses occurred within the workforce. The template worksheets provide a starting point for developers to create analytic reports.

Workforce Loss (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by bimonthly.

Workforce Loss (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by month.

Workforce Loss (Organization Hierarchy) Trend Analytics by Position (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by position.

Workforce Loss (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by quarter.

Workforce Loss (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by semi-year.

Workforce Loss (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet lists the total losses that occurred within a given date range, grouped by year.

Workforce Losses Report (HRMSi)

This report investigates the different reasons you are losing workforce within your enterprise. Are you losing workforce because the workforce is transferring to different parts of your enterprise, because current employee assignments are ending, because employee assignments are being suspended, or because employees are leaving your enterprise?

Workforce Planning Summary Analysis – Composition by Location (HRMSi, EDW)

The Composition by Location worksheet provides a summary of person head count or full-time equivalent, by location, for a specified top-level employing organization and a specified period of time. All data collected in that period will be included.

Workforce Planning Summary Analysis – Composition Summary (HRMSi, EDW)

The Composition Summary worksheet provides a summary of workforce composition for a top-level employing organization for a specified period of time. All data collected within that period will be included.

Workforce Planning Summary Analysis – Organization Changes (HRMSi, EDW)

The Organization Changes worksheet provides a summary of the head count or full time equivalent for employees changing organizations within a specified calendar year. Initially only the top-level employing organizations are displayed; you need to drill down to see transfers between organizations further down the organizational hierarchy.

Workforce Planning Summary Analysis – Recruitment by Organization (HRMSi, EDW)

The Recruitment by Organization worksheet gives you a recruitment summary by top-level employing organization. You can report on the following measures: head count, full-time equivalent, average number of days between application and hire, and average number of days between vacancy start and hire.

Workforce Planning Summary Analysis – Recruitment Efficiency (Average Days) (HRMSi, EDW)

The Recruitment Efficiency (Average Days) worksheet provides information concerning efficiency of recruitment for a specified calendar year (based on the date employment started) for each top-level employing organization. You can report on the average number of days from application to termination (the date the application was ended by the employer or the applicant), first interview, second interview, offer, acceptance, and hire.

Workforce Planning Summary Analysis – Separation by Organization (HRMSi, EDW)

The Separation by Organization worksheet provides a summary of person head count or full-time equivalent by top-level employing organization.

Workforce Planning Summary Analysis – Voluntary/Involuntary Separation (HRMSi, EDW)

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization by loss type (voluntary or involuntary) for the last 3 years and the current year.

Workforce Ratio Report (HRMSi)

The workforce assigned to different types of jobs can vary over time. This report compares the percentage of workforce assigned to up to three job categories over time. If you want to investigate the absolute number of employees for different job categories rather than the percentage of employees, you can run the related Workforce Comparison report from this report.

Workforce Separation Analysis – Separation by Age Band (HRMSi, EDW)

The Separation by Age band worksheet provides a summary of person head count or full-time equivalent by employee age band for a selected top-level employing organization.

Workforce Separation Analysis – Separation by Disability Status (HRMSi, EDW)

The Separation by Disabled Status worksheet provides a summary of person head count or full-time equivalent by disability status (disabled, not disabled, or undefined) for a selected top-level employing organization.

Workforce Separation Analysis – Separation by Gender (HRMSi, EDW)

The Separation by Gender worksheet provides a summary of person head count or full-time equivalent by gender for a selected top-level employing organization.

Workforce Separation Analysis – Separation by Organization (HRMSi, EDW)

The Separation by Organization worksheet provides a summary of the person head count or full-time equivalent by top-level employing organization.

Workforce Separation Analysis – Separation by Period of Service (HRMSi, EDW)

The Separation by Period of Service worksheet provides a summary of person head count or full-time equivalent by period of service for a selected top-level employing organization.

Workforce Separation Analysis – Separation by Period of Service and Reason (HRMSi, EDW)

The Separation by Period of Service and Reason worksheet provides a summary of person head count or full-time equivalent by period of service and separation reason for a selected top-level employing organization and calendar year (based on the year separation occurred).

Workforce Separation Analysis – Separation Reasons by Age Band, Disability Status, and Gender (HRMSi, EDW)

The Separation Reasons by Age Band, Disability Status, and Gender worksheet provides a summary of person head count or full-time equivalent by separation reason for a selected top-level employing organization, by age band, disability status, or gender.

Workforce Separation Analysis – Separation Reasons by Organization (HRMSi, EDW)

The Separation Reasons by Organization worksheet provides a summary of person head count or full-time equivalent for a selected top-level employing organization, by separation type (voluntary or involuntary) and separation reason (for example, disability, poor performance, end of contract etc.).

Workforce Separation Analysis – Voluntary/Involuntary Separation (HRMSi, EDW)

The Voluntary/Involuntary Separation worksheet provides a summary of person head count or full-time equivalent for a specified top-level employing organization by voluntary or involuntary separation type.

Workforce Separation by Rolling Month – Status PMV Report (HRMSi)

This report helps you monitor monthly FTE and head count separation. It provides a view of the Workforce FTE Separation and Workforce head count Separation Key Performance Indicator data, including target and actual values.

Workforce Summary Analysis Report (HRMSi)

This report is the first in a suite of reports that enables you to investigate workforce in your enterprise. You can review the losses, gains and total workforce you have in different organizations within your enterprise.

Competencies, Qualifications and Development

Competence (Skill) Development Detail – Competence Delivered by Training Activity

This worksheet enables you to view competencies delivered by training activities and events. The resulting information allows you to compare the competencies delivered by training to those required, and to analyze training efficiency.

Competence (Skill) Development Detail – Competence Requirement

This worksheet displays competence requirements for all organizations within a Business Group. The worksheet enables you to analyze competence requirements for Business Groups, organizations, jobs, positions, and grades. For each requirement you can investigate the competencies needed for a particular job, and the skills shortages within an organization.

Competence (Skill) Development Detail – Person Competence Profile

This worksheet enables you to analyze employee competency profiles by type. It allows you to view employees with similar competencies, and compare employees of similar grade.

Competence Levels

This report displays the proficiency levels of employees or applicants for a competence.

Competence Levels (Organization Hierarchy) Detail Analytics by Person with Rank (HRMSi)

This worksheet lists each individual that has the selected competence, and shows you both the proficiency level they have achieved, and the proficiency level translated into a proficiency rank.

Competence Levels (Organization Hierarchy) Detail Analytics by Person (HRMSi)

This worksheet lists the individuals who hold a selected competence and their proficiency levels for that competence.

Competence Match (Organization Hierarchy) Status Analytics by Organization and Location (HRMSi)

This worksheet enables you to see the each person's level of proficiency for the competencies for their job, grouped by organization and location.

Competence Match (Organization Hierarchy) Status Analytics by Person (HRMSi)

This worksheet enables you to see individuals' proficiency levels.

Competence Match (Organization Hierarchy) Status Analytics by Person Graph (HRMSi)

This worksheet breaks down each competence relevant to the selected job into percentages below, within, and above the required proficiency ranges for the job. It shows how an individual's competencies map to the requirement range.

Competence Match (Organization Hierarchy) Status Analytics Compare to Minimum Proficiency (HRMSi)

This worksheet compares people's proficiency levels with the minimum proficiency requirement for each competence relevant to their job.

Competence Match (Organization Hierarchy) Status Analytics Compare to Range (HRMSi)

This worksheet compares people's proficiency levels to the required proficiency range for each competence relevant to their job.

Group Competencies Report (HRMSi)

For each job and grade this report displays the proficiency levels for your employees or applicants in each required competence.

Individual Competencies Report (HRMSi)

This report is run from the Group Competencies report. This report compares an individual's competencies against the required competencies for the job and grade they hold. If your employee does not have the proficiency level you require, a training course may exist to help. By clicking on a competence, you can run the Training Classes By Competence report to display courses that offer the selected competence.

Learning Management

Delegate Chargeback (Training Center Hierarchy) Detail – Delegate Chargeback (OLM)

This worksheet investigates the amount transferred between two cost centers within an enterprise for internal student enrollments.

Employee Training Attendance Success (Organization Hierarchy) Status Analytics by Geography Area (HRMSi)

This worksheet investigates how successfully employees in different geographical areas are attending training courses.

Employee Training Attendance Success (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet investigates how successfully employees in different organizations are attending training courses.

Employee Training Attendance Success (Organization Hierarchy) Template Analytics by Year (HRMSi)

This worksheet enables you to see training success for each year. The template worksheets provide a starting point for developers to create analytic reports.

Employee Training Attendance Success (Organization Hierarchy) Template Analytics Detail (HRMSi)

This worksheet calculates the training success rates for training events with the same start and end dates, for attendees in each organization, location, job, grade, and position. The template worksheets provide a starting point for developers to create analytic reports.

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Bi Month (HRMSi)

This worksheet investigates how successfully employees are attending training courses, grouped by bimonthlies.

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Month (HRMSi)

This worksheet investigates how successfully employees are attending training courses, grouped by months.

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Quarter (HRMSi)

This worksheet investigates how successfully employees are attending training courses, grouped by quarters.

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Semi Year (HRMSi)

This worksheet investigates how successfully employees are attending training courses, grouped by semi-years.

Employee Training Attendance Success (Organization Hierarchy) Trend Analytics By Year (HRMSi)

This worksheet investigates how successfully employees are attending training courses, grouped by years.

Event Player Progress – by Player Status (OLM)

This worksheet investigates the progress of your Oracle Learning Management hosted training events by the number of delegates at each Player Status. The Player Status categories are Completed, Passed, Incomplete, Not Attempted, and Failed.

Event Player Progress – by Total Time Taken Status (OLM)

This worksheet investigates the progress of your Oracle Learning Management hosted training events by the total time that delegates have been playing content of a course within the OLM player.

Event Player Progress – Completion Summary (OLM)

This worksheet presents all relevant completion details for OLM training events.

Event Ranking Status – by Attendance (HRMSi)

This worksheet enables you to analyze the popularity of training events by ranking them by course attendance.

Event Ranking Status – by Event Days (HRMSi)

This worksheet enables you to investigate the popularity of training events by ranking them by event days.

Event Resource (Training Center Hierarchy) Detail – Booked Resources per Event

This worksheet enables you to analyze the resources booked for specific training events.

Event Resource (Training Center Hierarchy) Detail – Event Enrollments

This worksheet enables you to investigate the number of students who enroll on an event, and the number of students who successfully attend the event.

Event Resource (Training Center Hierarchy) Detail – Events Without Trainer

This worksheet enables you to investigate the training events that have no associated trainer.

Event Resource (Training Center Hierarchy) Detail – Events Without Venue

This worksheet enables you to investigate training events that have no associated venue.

Event Resource (Training Center Hierarchy) Detail – Overbooked Resources

This worksheet enables you to analyze overbooked resources.

Event Resource (Training Center Hierarchy) Detail – Required Resources Missing

This worksheet enables you to investigate the resources that are required but have not been booked for a training event.

Event Resource (Training Center Hierarchy) Detail – Resource Checklist

This worksheet displays the list of resources required to successfully run a training event activity.

Event Resource (Training Center Hierarchy) Detail – Resource Schedule

This worksheet enables you to view the schedule for each training resource, to ensure that resources are not booked for more than one event at any one time.

Event Resource (Training Center Hierarchy) Detail – Suppliable Resources

This worksheet enables you to analyze the cost and availability of suppliable resources for your training event.

Event Resource (Training Center Hierarchy) Detail – Training Events

This worksheet enables you to investigate the location, start date, and duration of specific training events.

Player Progress Detail – by Player Status (OLM)

This worksheet enables you to analyze the progress of delegates on your OLM hosted training events by Player Status.

Player Progress Detail – by Total Time Taken Status (OLM)

This worksheet investigates the progress of individual delegates on your OLM hosted training events, by the total time they have been playing content using the OLM player.

Student Attendance (Internal) Detail – Attendance Summary

This worksheet enables you to analyze the number of internal students attending training events. You can view internal student attendance by activity type, analyze success rates and information about failures.

Student Success (External) Status – by Company (HRMSi)

This worksheet enables you to analyze the success of training hours delivered to external students for a company. You can investigate this for a business group and year.

Student Success (External) Status – by Company and Year (HRMSi)

This worksheet enables you to analyze the success of training hours delivered to external students for a company, for different years. You can investigate this for a Business group and each company.

Student Success (Internal) Trend – by Job and Year (HRMSi)

This worksheet enables you to analyze the number of training hours delivered to internal students for a job by year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Student Success (Internal) Trend – by Job Category and Year (HRMSi)

This worksheet enables you to analyze the number of training hours delivered to internal students each year for a job by category, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Student Success (Internal) Trend – by Location and Year (HRMSi)

This worksheet enables you to analyze the number of training hours delivered to internal students for a location each year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Student Success (Internal) Trend – by Organization and Year (HRMSi)

This worksheet enables you to analyze the number of training hours delivered to internal students each year, and the success of these hours. You can investigate student success rates for a Business Group and organization within your enterprise.

Training Classes by Competence (HRMSi)

This report is run from the Individual Competencies report. This report enables you to investigate training classes that provide a selected competence. The report displays the course time, the competence level delivered, the dates the course is run, the class title and status, the number of class places, the class venue and the cost.

Training Cost and Revenue Analysis – by Competence (HRMSi)

This worksheet enables you to analyze the cost and revenue of training activities by the competence achieved if a student successfully completes the activity.

Training Cost and Revenue Analysis – by Sponsoring Organization (HRMSi)

This worksheet enables you to analyze the cost and revenue of training events for different organizations, by Business group and year.

Training Cost and Revenue Analysis – by Sponsoring Organization and Year (HRMSi)

This worksheet enables you to analyze the costs and revenue associated with training for different years. You can investigate costs and revenue for a Business Group and sponsoring organization.

Training Cost and Revenue Analysis – by Training Activity (HRMSi)

This worksheet enables you to analyze the cost and revenue generated by training events. You can investigate training activities for a specific Business Group, sponsoring organization and year.

Training Cost and Revenue Analysis – by Training Activity and Year (HRMSi)

This worksheet enables you to analyze the cost and revenue of training activities for different years, by Business group and sponsoring organization.

Training Cost and Revenue Analysis – by Training Category (HRMSi)

This worksheet enables you to analyze the cost and revenue of training events for a training category. You can investigate costs and revenue for a Business group, sponsoring organization, and year.

Training Cost and Revenue Analysis – by Training Center (HRMSi)

This worksheet enables you to analyze the costs and revenue of a training event for a training center, by Business Group, sponsoring organization and year.

Training Cost and Revenue Analysis – by Training Center and Year (HRMSi)

This worksheet enables you to analyze the cost and revenue of training activities for different years. You can investigate by Business group, sponsoring organization, and training center.

Training Cost and Revenue Analysis – by Training Category and Year (HRMSi)

This worksheet enables you to analyze the cost and revenue of training events in different years. You can investigate costs and revenue for a Business Group, sponsoring organization, and training category.

Training Cost and Revenue Analysis – Competence by Year (HRMSi)

This worksheet enables you to analyze the cost and revenue of training activities by competence and year.

Training Course Ranking by Amount Status – Course Ranking by Amount (HRMSi)

This report investigates the total amount of money generated by enrollments on each training event, and allows training events to be ranked by the enrollment amount generated.

Training Success (HRMSi)

This report enables you to investigate how successfully employees are attending training courses for a particular organization, location, job, and job category. You can also display your PMF targets by selecting a business plan.

Training Success Analysis – by Competence (HRMSi)

This worksheet enables you to investigate the success rate of a training activity by competencies. You can investigate competencies for a sponsoring organization and year.

Training Success Analysis – by Sponsoring Organization (HRMSi)

This worksheet enables you to investigate the training success rate of training events for different sponsoring organizations.

Training Success Analysis – by Training Activity (HRMSi)

This worksheet enables you to investigate the success rate of different training activities. You can investigate training activities by year and sponsoring organization.

Training Success Analysis – by Training Category (HRMSi)

This worksheet enables you to investigate the training success rate of events by training category. You can investigate different training categories for a Business Group and year.

Training Success Analysis – by Training Center (HRMSi)

This worksheet enables you to investigate the training success rate of different training centers, by Business Group and year.

Training Success Analysis – for a Competence by Year (HRMSi)

This worksheet enables you to investigate the training success rate of training activities for a competence over a number of years. You can investigate a competence for each sponsoring organization.

Training Success Analysis – for a Sponsor Organization by Year (HRMSi)

This worksheet enables you to investigate the training success rate of training events for a sponsoring organization for each year.

Training Success Analysis – for a Training Activity by Year (HRMSi)

This worksheet enables you to investigate the success rate of training activities each year. You can investigate training activities by Business Group and activity.

Training Success Analysis – for a Training Category by Year (HRMSi)

This worksheet enables you to investigate the training success rate of a training event in different years. You can analyze training success for a Business Group and training category.

Training Success Analysis – for a Training Center by Year (HRMSi)

This worksheet enables you to investigate the training success rate of a training center over a number of years. You can analyze success by Business Group and training center.

General Compensation Structures

Element Link Details Report (Payroll)

The eligibility criteria for an element or group of elements.

Salary and Grade Related Pay and Progression

Average Salary By Group Report (HRMSi)

This report enables you to investigate the average salaries for different groups of employees. You can also select which area of your enterprise you want to investigate.

Average Salary Trend Report (HRMSi)

This report reviews salary trends in different areas of your enterprise. It displays the average salary of all your employees who match the selection criteria. You can investigate the trends in average salaries for different organizations, jobs, grades, and locations. You can also choose the currency you want to view the salaries in, and include or exclude salaries that are not paid in your chosen currency.

Current and Projected Progression Point Values Report

The *expected* results of running the Increment Progression Points process, that is the projected point and value changes for a group of employees.

Employee Increment Results Report

The *actual* results of running the Increment Progression Points process, that is progression point and value changes for a group of employees.

Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies, United States Specific) Detail – by Organization Hierarchy (US)

This worksheet enables you to report on employee details, based on the employee primary assignment in the United States legislation, for a given organization and its subordinate organizations.

Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) (United States Specific) Detail – by Supervisor Hierarchy (US)

This worksheet enables you to report on employee details based on the employee primary assignment in the United States legislation, for a given supervisor and his/her subordinates.

Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employee details based on the employee primary assignment (in a non-legislative specific format) for a given organization and its subordinate organizations.

Employee Primary Assignment with Salary and Grade Rates (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employee details based on the employee primary assignment (in a non-legislative specific format) for a given supervisor and his/her subordinates.

Employee Primary Assignment with Salary (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given organization and its subordinate organizations.

Employee Primary Assignment with Salary (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employee details based on employee primary assignment, in a non-legislative specific format, for a given supervisor and his/her subordinates.

Employee Salary (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by bimonthly.

Employee Salary (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by month.

Employee Salary (Organization Hierarchy) Trend Analytics by Month and Organization (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by month and organization.

Employee Salary (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by quarter.

Employee Salary (Organization Hierarchy) Trend Analytics by Quarter and Organization (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by quarter and organization.

Employee Salary (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by semi-year.

Employee Salary (Organization Hierarchy) Trend Analytics by Year and Organization (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by year and organization.

Employee Salary (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet lists the average salaries of employees, within a given date range, grouped by year.

Employee Salary and Grade Range (Organization Hierarchy) Trend Analysis Full Details (HRMSi)

This worksheet compares employees' salaries to their grade minimum, mid, and maximum points, and displays the value required for the employee's salary to reach the next point in the grade. It also includes details of employees' organization, location, job, and position.

Employee Salary and Grade Range (Organization Hierarchy) Trend Analysis Graph (HRMSi)

This worksheet displays a table and a chart that compare each employee's salary to the minimum, mid, and maximum points for their grade.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Age Band (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by Age Band.

Employee Salary by Group (Organization Hierarchy) Status Analytics by GB Ethnic Group (HRMSi) (UK)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by UK ethnic group.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Gender (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by gender. Employee Salary by Group (Organization Hierarchy) Status Analytics by US Ethnic Group Worksheet (HRMSi) (US) This worksheet enables

you to investigate the average salaries of different groups of employees, grouped by US ethnic group.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Grade (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by grade.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Job (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by job.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Length of Work Band (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by Length of Work Band.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Location (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by location.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Organization (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by organization.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Performance Rating (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by performance rating.

Employee Salary by Group (Organization Hierarchy) Status Analytics by Position (HRMSi)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by position.

Employee Salary by Group (Organization Hierarchy) Status Analytics by US Ethnic Group (HRMSi) (US)

This worksheet enables you to investigate the average salaries of different groups of employees, grouped by US ethnic group.

Employee Salary by Job and Grade (Multiple Hierarchies) Status – by Organization Hierarchy (HRMSi)

This worksheet enables you to compare employee salaries for each job and grade. For a given organization and its subordinate organizations, the average, minimum, and maximum employee salaries for jobs and grades are shown.

Employee Salary by Job and Grade (Multiple Hierarchies) Status – by Supervisor Hierarchy (HRMSi)

This worksheet enables you to compare employee salaries for each job and grade. For a given supervisor and his/her subordinates, the average, minimum, and maximum employee salaries for jobs and grades are shown.

Employee Salary Change (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employee salary change details by organization for a given time period.

Employee Salary Change (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employee salary change details by supervisor for a given time period.

Employee Salary Change Detail – by Gender

This worksheet enables you to analyze salary change within your organization, by gender. It allows you to analyze differences in salary changes between male and female employees across organizations.

Employee Salary Change Detail – by Performance Rating

This worksheet enables you to investigate the effects of performance ratings on employee salary change across organizations. It allows you to ensure employees are rewarded for performance.

Employee Salary Change Detail – by Person

This worksheet enables you to investigate salary changes for individual employees.

Employee Salary Change Detail – by Years of Service

This worksheet displays salary change information by years of service across organizations. The resulting information allows you to compare salary change across Business Groups and organizations, and view salary change information by length of service.

Employee Salary Change Detail – Summary

This worksheet enables you to view information about salary changes within your organization. The resulting information allows you to analyze salary changes across all organizations in a Business Group.

Employee Salary Component (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

Use this worksheet to investigate the cost of salary changes for each change component across different bimonthlies.

Employee Salary Component (Organization Hierarchy) Trend Analytics by Month (HRMSi)

Use this worksheet to investigate the cost of salary changes for each change component across different months.

Employee Salary Component (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

Use this worksheet to investigate the cost of salary changes for each change component across different quarters.

Employee Salary Component (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

Use this worksheet to investigate the cost of salary changes for each change component across different semi-years.

Employee Salary Component (Organization Hierarchy) Trend Analytics by Year (HRMSi)

Use this worksheet to investigate the cost of salary changes for each change component across different years.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Age (HRMSi)

This worksheet investigates the spread of salaries across employee ages.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Grade (HRMSi)

This worksheet investigates the spread of salaries within grades.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Job (HRMSi)

This worksheet investigates the spread of salaries within jobs.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Length of Service (HRMSi)

This worksheet investigates the spread of salaries within Length of Service bands.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Location (HRMSi)

This worksheet investigates the spread of salaries within locations.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Organization (HRMSi)

This worksheet investigates the spread of salaries within organizations.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Performance Rating (HRMSi)

This worksheet investigates the spread of salaries across performance ratings.

Employee Salary Spread (Organization Hierarchy) Detail Analytics by Position (HRMSi)

This worksheet investigates the spread of salaries within positions.

Employee with Tenure (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given organization and its subordinate organizations.

Employee with Tenure (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employee tenure details (based on the employee primary assignment in a non-legislative specific format) for a given supervisor and his/her subordinates.

Headcount and Salary Trend (HRMSi, DBI)

This report shows changes in head count and salaries over time for the selected top line manager.

Headcount and Salary by Country (HRMSi, DBI)

This report displays the total employee head count, percentage headcount change, average salary and percentage average salary change for the countries with the highest head count for the selected top line manager.

Headcount and Salary Detail (HRMSi, DBI)

This report lists the employees and their salary that comprise the Total Salary value you drilled from the Salary by Job Family Status report. This report displays the salaries in both their local currency and in the DBI primary or the global currency.

Salary (HRMSi, DBI)

The Salary report displays the employee total salary, average salary, and salary change percent of all direct reports for the selected top line manager.

Salary by Job Function Status (HRMSi, DBI)

This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job function. You can access this report from the Total Salary column in the parent Salary report.

Salary by Job Family Status (HRMSi, DBI)

This report is similar to the Salary report, except that it presents a view of the selected manager's employees by job family. You can access this report from the Job Function names in the Salary by Job Function report.

Salary and Grade Range Report (HRMSi)

Using Oracle HRMS you can define the minimum, mid points and maximum salaries for different grades in your enterprise. This report enables you to investigate how salaries relate to grade rates, including which employees are paid more than the maximum for their grade, which employees are paid below the mid point or maximum for their grade and by how much, and what would be the cost of increasing a group of employees to the mid point or maximum for their grade.

Salary Component Trend Report (HRMSi)

The amount your enterprise spends on salaries is likely to change over time. Oracle HRMS enables you to record a reason for each salary increase you give to an employee. Use the Salary Component Trend report to investigate the total cost of salary changes for each change component you have identified.

Salary Distribution Within Grade Range PMV Report (HRMSi)

This report provides a view of the Workforce Below Grade Mid Point and Workforce Above Grade Mid Point Key Performance Indicator data. The report displays table data by default; you can optionally display the chart.

Salary Review Report

Current, past and proposed salaries for a selected list of employees.

Salary Spread Report (HRMSi)

Within your enterprise it is useful to know the salary ranges for different groups of employees. This report investigates the spread of salaries by four different criteria: age (in years), length of service (in years), grade, and Performance Rating.

Salary Survey Comparison – Salary Survey Mappings (HRMSi)

This worksheet enables you to analyze salary surveys, which have been mapped to particular jobs or positions.

Salary to Grade Range Mid Point Variance PMV Report (HRMSi)

This report provides a view of the Salaries Varying From Grade Mid Point Key Performance Indicator data. The report displays table data by default; you can optionally display the chart.

Compensation and Awards Management

Compensation Workbench Progress Report

This report checks the progress of the compensation cycle for an availability period and plan that you select. If you run the report after the Compensation Workbench Pre-Process, it provides information about employee eligibility. If you run the report after the Compensation Workbench Post Process, it summarizes the rates assigned to each employee.

Mass Awards Deselection (FD)

Lists employees deselected for a mass award

Mass Awards Listing by Employees (FD)

Notification of Personnel Action in list form for an individual employee selected for a mass award

Mass Awards NPA Listing for All Employees (FD)

Notification of Personnel Action in list form for employees selected for a mass award

Mass Award Preview (FD)

Lists employees selected for a mass award

Mass Salary Deselection (FD)

Lists employees deselected for a salary adjustment

Mass Salary PA Listing for All (FD)

Notification of Personnel Action in list form for employees selected for a salary adjustment

Mass Salary PA Listing for Employee (FD)

Notification of Personnel Action in list form for an individual employee selected for a salary adjustment

Mass Salary Preview (FD)

Lists employees selected for a salary adjustment

Leave and Absence Management

Absence Action List Report

Details the re-integration actions to be performed for employees.

Absence Hours Report (HRMSi)

This report investigates the absence hours recorded for employees in your enterprise. You can select the employees you want to run the report for by organization, location, job category, job, and grade. You can also run the report for the time period of your choice.

Absence Report (FR)

Lists the details regarding the employer, absences and the salaries received by the employee over a reference period for reporting to the French Local Social Security (CPAM).

Absence Report (HU)

Lists the normal and sickness holiday days an employee is entitled to annually.

Absences Report

Absence details for an employee or organization, for some or all absence types.

Daily Sick and Recovery Report (Netherlands)

Details all new instances of sick employees and all employees who have recovered from an illness.

Employee Absence Hours (Organization Hierarchy) Trend Analytics by Bi Month (HRMSi)

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by bimonthly.

Employee Absence Hours (Organization Hierarchy) Trend Analytics by Month (HRMSi)

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by month.

Employee Absence Hours (Organization Hierarchy) Trend Analytics by Quarter (HRMSi)

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by quarter.

Employee Absence Hours (Organization Hierarchy) Trend Analytics by Semi Year (HRMSi)

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by semi- year.

Employee Absence Hours (Organization Hierarchy) Trend Analytics by Year (HRMSi)

This worksheet investigates the absence hours recorded for employees in your enterprise over time, grouped by year.

Employee Hours Worked (Organization Hierarchy) Trend Analytics by Payroll Period (HRMSi)

This worksheet investigates the number of overtime and regular hours worked. The worksheet displays the number of hours worked for each overtime band you use in your enterprise, such as double time or time-and-a-half.

Employees on Leave (Multiple Hierarchies) Detail – by Organization Hierarchy

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given organization and its subordinate organizations.

Employees on Leave (Multiple Hierarchies) Detail – by Supervisor Hierarchy

This worksheet enables you to report on employees who are on leave on the effective date chosen. Employees are listed for a given supervisor and his/her subordinates.

Hours Worked Report (HRMSi)

This report investigates the number of overtime and regular hours worked. The report displays the number of hours worked for each overtime band you use in your enterprise, such as double time or time-and-a-half. You can run the report for a selected time period.

Leave Details Report (Payroll) (South Africa)

This report is used for monitoring and analyzing employee absences (sample report).

Leave Liability Report (Payroll) (AU)

Displays leave balances for employees.

Leave Liability Report (NZ)

Displays the accrued debt owed by an organization for the leave balances of their employees.

Leave Liability Report (Payroll) (South Africa)

Calculates monetary value of accrued leave (sample report).

Maximum SSP Weeks Report (UK)

Provides details of employees who have had absences for 22 weeks or longer, enabling you to monitor long periods of incapacity for work (PIWs) which have reached, or are approaching, the maximum number of weeks that SSP can be paid.

Open Sickness Absences Report (UK)

Provides information on current sickness absences.

SAP Element Results Report (UK)

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

SMP Element Results Report (UK)

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

SPP Adoption Element Results Report (UK)

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

SPP Birth Element Results Report (UK)

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

SSP Element Result Listing (UK)

Lists and sums all the run results processed for the statutory pay element for a specified payroll period, and displays them by individual assignment or employee.

Statutory Adoption Pay Report (UK)

Provide information on the statutory payment history for a specified period, for each employee included in the report.

Statutory Maternity Pay Report (UK)

Provide information on the statutory payment history for a specified period, for each employee included in the report.

Statutory Paternity Birth Pay Report (UK)

Provide information on the statutory payment history for a specified period, for each employee included in the report.

Statutory Paternity Adoption Pay Report (UK)

Provide information on the statutory payment history for a specified period, for each employee included in the report.

Statutory Sick Pay Report (UK)

Provide information on the statutory payment history for a specified period, for each employee included in the report.

Health and Welfare Management**COBRA Benefit Initial Information (US)**

This report--typically sent to employee new hires--provides general information about COBRA.

COBRA Benefits Notification Letter (US)

This report provides electable choice information to persons who are eligible for COBRA.

COBRA Coverage or Payments Report (US)

Coverage of payments report.

COBRA Standard Letters (including Expiration and Grace Period Expiration) (US)

Publish a standard COBRA letter.

COIDA Report (Payroll) (South Africa)

Compensation for Occupational Injuries & Diseases Act report.

Eligibility and Enrollment List

Run this report to list the total number of eligible and enrolled participants in plans you administer for Standard and Advanced Benefits, Individual Compensation Distribution, and Compensation Workbench. The report also lists newly ineligible and de-enrolled participants.

HIPAA Dependent Letter (US)

Run this report to generate a HIPAA certificate for qualified dependents only, such as for instances where a dependent ages out of a plan.

HIPAA Letter (US)

Run this report to generate a HIPAA certificate for qualified participants and their dependents

Life Events Summary Report

Run this report to analyze life events that occur to your compensation and benefits participants. The report lists the total number of potential and active life events, and their status, for a specified period.

Premium Reconciliation Report

Run this report to support the monthly benefits billing reconciliation process. This report compares monthly premium amounts to standard rates and element entries by pay period, for all participants enrolled during the reporting period.

Other Payroll Earnings and Deductions

Union Deductions Report (Payroll) (UK)

Total deductions that your employees pay to unions.

Payrolls

Payroll Statutory Calendar Report (Payroll) (UK)

The sequence of regular payment dates for each payroll and the numbers of assignments completed, pre-paid and paid within a run.

Payroll Report (Check list for Unemployment Insurance) (Payroll) (Japan)

This is a list to check details of unemployment insurance insured employee

Payroll Report to Create File-Notification Change Address for Welfare Pension Insurance (Payroll) (Japan)

This notification file is submitted by the business proprietor to the social insurance office when an insured employee's address is changed.

Payroll Report to Create File-Notification of Disqualification for Welfare Pension Insurance (Payroll) (Japan)

This notification file is submitted by the business proprietor to the social insurance office when the insured employee loses qualification because of some reason (termination, death, etc.)

Payroll Report to Create File-Notification of Geppen for Welfare Pension Insurance (Payroll) (Japan)

This notification file is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums are changed without waiting for the following regular determination because of rise in pay etc.

Payroll Report to Create File-Notification of Qualification for Welfare Pension Insurance (Payroll) (Japan)

This notification file is submitted by the business proprietor to the social insurance office when the person applicable to Article 9 of Welfare Pension Insurance Law or the 10th article is employed.

Payroll Report to Create File-Notification of Santei for Welfare Pension Insurance (Payroll) (Japan)

This notification file is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums in and after October of the year are determined based on their earnings.

Payroll Payment and Distributions

Advance Pay Listing (Payroll) (UK)

Details of the advance pay periods for employees due to receive advance pay.

Cheque Listing (Payroll) (South Africa)

Cheque payments made to employees.

Coinage Analysis Report (Payroll) (South Africa)

A cash analysis which provides a breakdown of the cash required.

Credit Transfer Payments Report (Payroll) (South Africa)

Paid/unpaid cheque values per bank branch.

Deduction Register Report (Payroll) (South Africa)

Deductions per element per employee.

Deposit Schedule Report (Payroll) (South Africa)

For credit transfer payments into bank accounts.

Employment Equity Income Differential Report (Payroll) (South Africa)

Outlines the required information needed for Employment Equity as defined by the Department of Labour.

Gross to Net Summary (Payroll) (UK)

Details of total earnings and deductions summarized for a specified payroll and payroll period.

Gross to Net Summary (Payroll) (US)

Details of total earnings and deductions summarized for a specified payroll and payroll period.

Manual Payments Report (Payroll) (South Africa)

Manual payments made for selected payruns and assignments.

Pay Advice (Payroll) (AU)

Generates pay advice for all employees for a specified payroll and period.

Pay Advice (Payroll) (Singapore)

Provides pay advice details in a customizable format, either for single assignments or all assignments on a payroll, after PrePayments process is complete for the payroll.

Pay Advice (Payroll) (South Africa)

A sample pay advice.

Pay Advice (Payroll) (France)

Presents Pay Advice details in a customizable format, either for single assignments or for all assignments on a payroll after PrePayments process is complete for the payroll.

Pay Advice (Payroll) (NZ)

Generates pay advice for all employees for a specified payroll and period.

See: *Oracle HRMS for New Zealand User Supplement*.

Pay Advice (Payroll) (Hong Kong)

Details about employees' income and deductions.

Pay Advice (Payroll) (UK)

Pay advice details in a customizable format, either for single assignments or for all assignments on a payroll after PrePayments process is complete for the payroll.

Payment Output File (Dutch)

Run this report to initiate the creation of the EFT Payment file. Produced in the format required by the official body Interpay, the EFT Payment file enables you to send employee payment details to your bank on magnetic tape.

RSC Levy Report (Payroll) (South Africa)

The amount of levies to be paid per RSC region.

Saudi Payment Output File (Payroll) (SA)

Run this report to initiate the creation of the EFT Payment file. The EFT Payment file enables you to send employee payment details to your bank on magnetic tape.

Saudi Payslip Report (Payroll) (SA)

Use this report to generate both online and printed payslips for employees. Online payslips enable employees to view their payslips information online, and helps reduce overheads, administration, and maintenance costs.

Skills Development Levy Report (Payroll) (South Africa)

Skills development levy per SETA or per organization within SETA.

Statement of Earnings (Payroll) (US)

Check writer process produces paychecks with statement of earnings.

Separation Pay E-file Report (Payroll Korea)

Oracle Payroll generates a report about separation pay, based on the Separation Pay Archive. Once generated, the employer can view, and print the report, and store it on magnetic tape to send to National Tax Service (NTS).

Separation Pay Slip Report (Payroll Korea)

Run this report to generate a pay slip with the earnings and deductions summary for all employees who left the enterprise, for a specified payroll and period. This generated pay slip report is then submitted to the National Tax Service (NTS).

Separation Pay Tax Receipt Report (Payroll Korea)

Run this report to generate the separation pay tax receipt for all employees who left the enterprise, for a specified payroll and period, and submit the generated report to the National Tax Service (NTS). The report contains detailed information like income tax and resident tax for received payments at the time the employee leaves the enterprise.

Additional Wages CPF Capping Report (Payroll Singapore)

The Additional Wages CPF Capping report shows whether an employee has overpaid or underpaid their Central Provident Fund (CPF) contributions on additional wages. Employees who have overpaid CPF are eligible to claim this amount from the Central Provident Fund Board.

Payroll Statutory Deductions and Reporting**Archive P11D (HR and Payroll) (UK)**

Runs the Legislative Report Generator to generate details of Class 1A NICs for reporting to the Inland Revenue.

Deduction Report (Payroll) (US)

The Deductions report always shows details for each run within the selected time frame by deduction classification, deduction type, and employee information. This information can be sorted by GRE, Location, or Organization

Employee Income Payment Detail Report (China)

Contains detailed information for the summarized information provided in the Individual Income Tax Withholding report.

Employee Listing (Hong Kong)

List of current employees with information such as employee name, identity card number, passport number, work permit number and expiry date, and the date an employee joined the company.

Employer Monthly Schedule Report (New Zealand) (NZ)

Lists the details of all employees and is submitted to Inland Revenue.

FBT Report (Australia) (AU)

Displays Fringe Benefits Tax information for a cost center.

Individual Income Tax Withholding Report (China)

Provides summarized information for all tax group rates separately.

Inland Revenue Arrears Payment Report (NZ)

Lists employees who are required to pay student loans or child support arrears to Inland Revenue.

Inland Revenue Form IR21 (Payroll) (Singapore)

Summarizes an employee's organization, personal details, and earnings and benefits in the two years prior to leaving the organization.

Inland Revenue Remittance Certificate Report (NZ)

Submitted to Inland Revenue by employers who are required to make PAYE payments, or employers who are Specified Superannuation Contribution Withholding Tax (SSCWT) payers.

IR56B Report (Payroll) (Hong Kong)

A statement of earnings for each employee used by the Inland Revenue to assess individual statements and forward an account to the employee for tax payable for the past financial year.

IR56E Report (Payroll) (Hong Kong)

Submitted for new hires, and includes information such as an employee's personal information, including their name, identification details, address, the employee's legal employer details and employment information.

IR56F Report (Payroll) (Hong Kong)

A notification by the employer about an employee who is leaving the enterprise but intending to stay in Hong Kong.

IR56G Report (Payroll) (Hong Kong)

A notification by the employer about an employee who is leaving the enterprise and also departing from Hong Kong.

IRP5 Tax Certificate (Payroll) (South Africa)

Tax certificates for employees who have paid tax during this tax year.

IT3(a) Tax Certificate (Payroll) (South Africa)

Tax certificates for employees who have paid no tax during this tax year.

MPF Remittance Report (Payroll) (Hong Kong)

A contribution report submitted to the Mandatory Provident Fund (MPF) Trustee detailing contributions for the period.

National Service In-Camp Training Computation (Payroll) (Singapore)

Calculates the pay amount that an employer can claim from the Ministry of Defence for an employee who is attending mandatory National Service In-Camp Training.

Health Insurance Premium Adjustment Annual Earnings Archive Process (Payroll Korea)

Stores information about the employees' previous year's earnings and the number of months worked in the previous year, and to produce an E-file that will be sent to the National Health Insurance Corporation (NHIC).

Health Insurance Adjustment Report for Leaving Employees (Payroll Korea)

The Health Insurance Adjustment for Leaving Employees report is run for all the employees leaving the enterprise and the report is then sent to National Health Insurance Corporation (NHIC). The report contains information such as the employees' previous year's income and the number of months the employee was employed in the enterprise.

NHIC uses this information to calculate and adjust the premium amount an employee must pay before leaving the enterprise.

National Pension Adjustment Annual Earnings Archive Process (Payroll Korea)

Stores information about the employees' earnings and the number of months worked in the previous year, and to produce an E-file that will be sent to the National Pension Corporation (NPC)

NPC uses this information to recalculate the pension and notify the enterprise about the new pension due for the current year.

National Pension Adjustment Report (Payroll Korea)

The National Pension Adjustment report is run for all the employees whose status has changed (newly hired or terminated workers) since the last report, and then send the report to the National Pension Corporation (NPC).

The NPC uses this information to calculate and adjust a new premium for the worker.

Statutory Deduction Adjustment Information - Upload Process (Payroll Korea)

You upload payroll adjustment information sent by the National Pension Corporation (NPC) and the National Health Insurance Corporation (NHIC) by uploading the text file and placing it in a directory where it can be read by the upload process. The application reads the data and loads into the Batch Element Entry (BEE) tables. These agencies send your enterprise these details as a text file.

NI Car Detail Report (Payroll) (UK)

All the NI Y amounts due from employees on a given payroll who have company car benefits.

NICable Benefits Summary Report (UK)

Lists the employee benefits for which the employer is liable for NI contributions.

P30 Report (Payroll) (Ireland)

PAYE and PRSI information for issue to the tax office each calendar month.

P35 Report (UK)

PAYE and PRSI information for all employees including leavers for issue to the tax office at the end of the tax year.

P45 Alignment Report (Payroll) (UK)

Draft printer alignment for P45 reports.

P45 Report (Payroll) (UK)

P45 details for terminated employees for issue to the tax office and the leaver; P45 details for current employees for issue to different tax offices.

P45(3) & P46 Exceptions Report (UK)

Enables you to identify those employees for whom a P45(3) or P56 has not been created, yet have been paid since their initial hire date.

P46 (P160) Pension Notification (UK)

Enables you to provide information on recipients of taxable pensions, and those gaining extra income while collecting a pension.

P60 Report (Payroll) (UK)

P60 details for employees employed by the business at the end of the tax year.

Quarterly Employment Survey (NZ)

Extracts information to enable the Statistics New Zealand quarterly employment survey to be completed.

Report on Hirings (CA)

You submit this monthly report to Human Resources Development Canada (HRDC) as part of a government insurance program designed to deter and detect overpayments.

Saudi Monthly Contributions Report (Payroll) (SA)

Use this report to create a list of employers' (on behalf of employees) contributions to GOSI for the contributory month. This enables the GOSI office to keep track of employee head count and their contributions to GOSI.

Saudi New and Terminated Workers Report (Payroll) (SA)

Use this report to provide monthly updates to the GOSI office about new and terminated employees for the specified month.

Saudi Workers Movement Report (Payroll) (SA)

Use this report to create a list of employees' movement for the specified month. This enables the GOSI office to keep track of newly hired employees, (with and without GOSI number) and terminated employees.

Summary of Tax Certificates (Payroll) (South Africa)

Summary of totals for each SARS code per preprocess.

Superannuation Contribution Report (AU)

Identifies monthly figures for superannuation salary and employer superannuation guarantee contributions.

Tax Certificate Number Report (Payroll) (South Africa)

Lists the generated tax certificate numbers and their assignment details, and the number of tax certificates issued and reissued.

Tax Office Report for Manual Completion (NL)

Enables you to generate the tax office report, print it out, and manually complete the remaining sections before sending it out to your tax office.

Tax Payments Listing (Payroll) (UK)

Details of employees' PAYE and National Insurance deductions.

Tax Register Report (Payroll) (South Africa)

Tax-related information and balances for current employees and ex-employees.

File-Tax Withheld Report (Payroll) (Japan)

This notification file details the total income tax withheld from an employee's earnings. Created by the legal employer to send the relevant local government.

Final Notice of Fixed Labor Insurance Fee Report (Payroll) (Japan)

This is the total list of wages for employees with breakdown of each month, and is submitted by the business proprietor to the relevant Labor Standards Inspection Office in May.

Local Tax Withheld Report (Payroll) (Japan)

This report details the total income tax withheld from an employee's earnings. The amount of tax withheld is forwarded by the legal employer to the relevant local government.

Notification Change Address for National Pension Type 3 Insured Report (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when an employee's insured dependent's (=National Pension Type 3rd insured's) address is changed.

Notification to Change Address for Welfare Pension Insurance Report (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when an insured employee's address is changed.

Notification to Change Address for Welfare Pension Insurance Report (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when an insured employee's address is changed.

Payroll Report (Notification for Geppen) (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums are changed without waiting for the following regular determination because of rise in pay etc.

Payroll Report (Notification for Santei) (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when an employee's social insurance premiums in and after October of the year are determined based on their earnings.

Payroll Report (Notification of Deduction for Dependents) (Payroll) (Japan)

This notification details employee's dependents so that he/she can receive deduction of a tax reduction for spouses, allowance for dependent, credit for handicapped person, etc. The legal employer receives this from employees before YEA period and must keep this in case the tax authority asks to present.

Payroll Report (Notification of Deduction for Ins Premiums, Spouse) (Payroll) (Japan)

This notification details employee's premiums of life and nonlife insurances so that he/she can receive insurance premium deduction and special exemption for spouse. The legal employer receives this from employees before YEA period and must keep this in case the tax authority asks to present.

Payroll Report (Notification of Dependents for Health Insurance / Notification of Type 3 Insured for National Pension) (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when the details of insured employee's dependents is changed.

Payroll Report (Notification of Disqualification for Health Ins/Welfare Pension Insurance) (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when the insured employee loses qualification because of some reason like termination, and death.

Payroll Report (Notification of Qualification for Health Ins/Welfare Pension Insurance) (Payroll) (Japan)

This notification is submitted by the business proprietor to the social insurance office when the person applicable to Article 9 of Welfare Pension Insurance Law or the 10th article is employed.

Salary Payment Summary Report (Payroll) (Japan)

This report details the total income tax withheld from all employees' total earnings. The amount of tax withheld is forwarded by the legal employer to the relevant local government.

Si FD Report (Payroll) (Japan)

This is a request set to execute line#2-#6 at once.

Tax Withheld Report (Payroll) (Japan)

This report details the total income tax withheld from an employee's earnings. The amount of tax withheld is forwarded by the legal employer to the relevant Japanese tax authority.

Total Income Tax Withheld Report (Payroll) (Japan)

This report details the total income tax withheld from all employees' total earnings. The amount of tax withheld is forwarded by the legal employer to the relevant Japanese tax authority.

Payroll Processing and Analysis

1099-R Exception Register (Payroll) (US)

Identifies employees who:have negative box 1 totals on the Form 1099-R, or have a zero box 1 total on the Form 1099-R, but have other negative 1099-R box totals.

1099-R Forms (Payroll) (US)

Provides for printing of retiree 1099-R at an individual level as well as all employees in a GRE.

1099-R Information Return (Payroll) (US)

Allows printing a single 1099-R or a range of 1099-Rs that you define. Sort options give you further flexibility in 1099-R distribution.

1099-R Register (Payroll) (US)

Allows viewing the amounts reported in each box of the Form 1099-R for all employees in a particular GRE for a given year.

1099-R Register Totals (Payroll) (US)

You can choose to view only the box totals for all selected employees in the report; individual employees will not be included in the report. Or you can choose to view box totals in the report for selected individual employees, as well as the totals for these employees.

Alien Retro Benefits Loss (Payroll) (US)

The Alien Retro Benefits Loss report identifies employees who have earned treaty benefits that are then revoked.

Alien Retro Benefits Projection (Payroll) (US)

The Alien Retro Benefits Projection identifies employees who are earning alien tax treaty benefits that could be subject to a retroactive loss at some point in the future.

Annual Unemployment Insurance (Form 940) Information (Payroll) (US)

Provides numbers for annual 940 filing.

Annual FUTA Tax Return (Payroll) (US)

Oracle Payroll provides certain information in the form of a work sheet that you then transcribe to the official form 940; however, some information must be provided by you.

Audit Report (Payroll)

Selects person, employee or applicant, assignment, element, recurring or non-recurring status. Shows Business Group, GRE (US only), assignment details, person entering data (responsibility), input date, effective change date, details of person affected. Lists all fields changed, with input date and effective date, old value and new value, responsibility, workstation address.

Cost Breakdown Report for Costing Run (Payroll)

Summarized costing totals for an individual costing.

Cost Breakdown Report for Date Range (Payroll)

Summarized costing totals for all costing runs within a given date range.

Earnings Audit (Payroll) (US)

Report detailing all employees with a particular element being processed in a given pay period.

Element Result Listing (Payroll)

Run results processed for a particular element over a defined period, and run results for selected input values of each employee's last assignment process.

Employee Payroll Movements Report (Payroll)

New hires, terminations, transfers in and transfer out of a selected payroll.

Employee Run Results (Payroll) (CA, US)

Users may select various elements for the various time frames, assignment of GREs. The report shows the run results for selected information by pay period.

Employee Run Results Summary Report (Payroll) (UK)

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

Federal 1099-R (magnetic media) (Payroll) (US)

Creation of Federal 1099R magnetic media.

Federal and State Tax Remittance Reporting (Payroll) (US)

This report shows the federal and state balances summarized for a particular range of check dates.

Federal W-2 (magnetic media) (Payroll) (US)

Creation of Federal W-2 magnetic media and summary totals.

GRE Totals (Payroll) (US)

Reconciliation report to be used to assist in period end processing balancing purposes. This report shows Federal and State level taxable balances and withholdings.

Local Tax Remittance Reporting (Payroll) (US)

This report shows the local tax balances summarized for a particular range of check dates.

Multiple Assignments Report (Payroll) (UK)

Lists employees who have been marked for multiple assignment processing and indicates where Priority Processing Type is not set and cannot be defaulted.

Multiple Worksite Report (US)

Reports on wages and locations of employees in all the multiple locations across all SUIs and other GREs.

NACHA (magnetic media) (Payroll) (US)

Provides for creation of employee NACHA information to be submitted.

NACHA Report (Payroll) (US)

Detail of employee NACHA information.

Over Limit Reporting (Payroll) (US)

The Over Limit Report identifies employees who have had taxes withheld in excess of the legal limit.

Pay Advice Alignment Report (Payroll) (UK)

Draft printer alignment for your sample pay advice.

Payment Register (Payroll) (South Africa)

Payment elements per employee.

Payment Register Detail and Summary Reports (Payroll) (US)

Detail and summary reports listing payments made to employees, listing payment method, check number, and amount.

Payments Summary Report (Payroll) (UK)

Payments totalled by payment method type and organizational payment method for a specified payroll and payroll period. Account details for each organizational payment method are also listed.

Payroll Activity Report (Payroll) (US)

The Payroll Activity report shows employee and group level payroll details.

Payroll Message Report (Payroll)

Display messages for processes connected to specified payrolls.

Payroll Reconciliation Payment Summary Report (Australia)(AU)

Generates payroll reconciliation or end of year processing and for all the legal employers in that period.

Payroll Reconciliation Summary Report (Australia)(AU)

Generates payroll reconciliation summary report for a specific payroll or quick-pay run, or for a specific period.

Payment Summary Self Printed Report (AU)

This report enables employers to self print payment summaries on plain paper. This feature is only available to employers who submit their Payment Summary data to the ATO electronically.

Payment Summary Validation Report (AU)

This report obtains all information from the archive tables and can be run several times in a year, against archived data, for data validation. The report lists details that are normally printed on the Payment Summary.

Payroll Tax Report (Australia)

Run this report to generate a payroll tax report detailing employer's liability for payroll tax contributions for a specified month and for a specified Australian state. You must run your payroll before running this report.

Payroll Reconciliation Report (New Zealand) (NZ)

Generates a payroll reconciliation for a specified payroll period.

Payroll Register (Payroll) (US)

Payroll Register Reporting is used to show employee and group level payroll details

Retro Notifications Report

Generates an assignment set containing retroactive changes applying to a period for which payroll processing has already taken place.

Saudi Payroll Register Report (Payroll) (SA)

Use this report to create payroll information for each employee for each payroll period, and store information for payroll verification, validation, and auditing purposes.

Start of Year: Records Unprocessed Report (Payroll) (UK)

Valid records on the Inland Revenue P9 tape that do not fully match your database records after running the Start of Year process.

UIF Report (Payroll) (South Africa)

Employee and employer contributions made to the Unemployment Insurance Fund.

W-2 Forms (Payroll) (US)

Prints employee W-2s at an individual level, thus allowing W-2s to be created as employees terminate, or for an entire GRE.

Year End Negative Balance Reports (Payroll) (US)

Report listing any negative balances found due to user adjustments or conversion issues.

Year End Adjustment e-File Report (Payroll) (Korea)

The generated report is about Year End Adjustment, based on the year end balance adjustment and archive process to view, and print the report, and store it on magnetic tape, and send the generated magnetic file to the local tax offices upon their request.

Year End Adjustment Ledger Report (Payroll) (Korea)

Generates the YEA Ledger using Oracle Reports for all three YEA types, Normal, Interim and Re. You can generate the ledger using three different criteria:

- Business Place
- Payroll Action
- Assignment Action

Year End Adjustment Reclaim Sheet (Payroll) (Korea)

Generates a record with details about YEA tax exemptions and deductions. Oracle Payroll bases this information on the date the employer enters in the Year End Adjustment Information window. The enterprise uses it to claim YEA and keeps the record as documentation for National Tax Services.

Year End Adjustment Tax Receipt Report (Payroll) (Korea)

Generates a YEA tax receipt with details like housing pre-tax deduction and insurance exemption for a particular payroll action, business place or an assignment set.

Year End Adjustment Tax Summary Report (Payroll) (Korea)

View the summarized YEA tax details for a business place and period in the generated report.

IR8S Ad Hoc Printed Archive Report (Payroll) (Singapore)

Generates an IR8S report for validation purposes, before submitting the report to the IRAS.

Payroll Event Rules

Void Payments (Payroll)

Details of cancelled cheque payments

Deploy Self Service Capability

Notification of Personnel Action (SF 50) (FD)

Prints the standard Notification of Personnel Action for an approved Request for Personnel Action

Request for Personnel Action (SF-52) (FD)

Prints the contents of the employee's Request for Personnel Action

Workforce Intelligence

Dutch Assignment SCL FLExfield Upgrade Report (Netherlands)

Run this report to view the information removed and moved by the Dutch Assignment SCL Flexfield upgrade script.

Processes

A8A File (Payroll) (Singapore)

Creates a file that includes the details of any benefits-in-kind provided to your employees, for example, car-related benefits, or the cost of running a fax machine. The process also creates a report for you to view the contributions that are included in the file.

A8B File (Payroll) (Singapore)

Creates a file that records details of any stock options granted to an employee, and any stock options exercised during a financial period.

ACB Process (Payroll) (South Africa)

Setting up and running ACB.

Advance Pay Batch Setup (South Africa) (Payroll) (South Africa)

Advance Pay Batch Setup.

Advance Pay Process (Payroll) (UK)

Allows you to pay employees in advance for holidays or other events.

Annual and Long Service Leave Liability Process (Australia) (AU)

Extracts information used in the Leave Liability Report.

ASB CSV Direct Credit Process (New Zealand) (NZ)

Details of all employees that use the direct credit as the payment method.

Audit Trail Update Tables Process

This process is used to set up audit trail on selected tables.

Audit Trail Update Datetracked Tables Process

This process is used to set up audit trail on selected datetracked tables.

BACS Process (Payroll) (UK)

Summarized totals for BACS tape amounts including consolidated totals for multi-day and multi-file formats.

Batch Print Notification of Personnel Action (FD)

Prints Notifications of Personnel Action (SF-50s) in batch mode.

BEE Batch Process (Purge)

This process is used to delete a batch from the BEE tables on completion of the concurrent request.

BEE Batch Process (Rollback)

This process is used to completely remove a BEE transfer, provided you have not purged the batch from the BEE tables

BEE Batch Process (Transfer)

This process is used to create element entries in the Oracle HRMS Entries table from the existing entries in the BEE temporary tables.

BEE Batch Process (Validate)

This process is used to test each batch line against predefined rules about element entries, and against any additional validation procedures that you have created.

Bulk Compile Formulas

Run this process to compile all of your formulas.

Calculate Commitment

Run this process to calculate the projected expenditures for a budget over a given period. You can calculate commitments for an entire budget or for a single position in a budget.

Calculate FTE for Assignments page (UK)

This process is used to populate the Assignment Budget Window with FTE values.

Cash Process (Payroll only) (UK)

Enables you to use cash as a payment method and record cash payments to employee assignments.

CDV Bank Name User Table Setup (Payroll) (South Africa)

Creates the CDV Bank Name User Table.

CDV Data Load Process (Payroll) (South Africa)

Loads CDV data.

Change Person Numbering to Automatic

Run this to process to change the method by which you identify your employees from manual to automatic number generation

Check Writer Process

Cheque/Check Writer process to determine the generation of cheques/checks for a specified payroll and consolidation set over a specified time period.

Check Writer Process (Payroll) (US)

This process is used to write sequences of checks for your payroll run.

Cheque Writer Process (Payroll) (South Africa)

Produces cheque payments.

Cheque Writer Process (Payroll)

This process is used to write sequences of cheques for your payroll run.

This process is used to populate the Assignment Budget Window with FTE values.

Child Sequence Generator Process (Germany)

This process generates the sequence number for children. The sequence number is used in the calculation of the local cost-of-living allowance.

Close Action Items Process (Advanced Benefits)

Run this process before the Close Enrollments Process to close any open action items that are required or optional for the persons you select.

Close Enrollments Process (Advanced Benefits)

Run this process to close a person's enrollment after elections have been made.

Collective Agreement Entitlement Evaluation

Run this process to evaluate and apply collective agreement entitlements for an employee.

Commitment GL Posting

You run the Commitment GL Posting batch process to transfer budget commitments from Oracle HRMS to Oracle General Ledger.

Communications Triggers Process (Advanced Benefits)

Use the communications triggers process to generate communications for persons who meet the selection criteria that you specify.

Compensation Workbench Back-Out Life Events Process

Run this process to remove the results of the Participation Process: Compensation for a life event associated with Compensation Workbench.

Compensation Workbench Close Enrollment Process

Run this process to close the life event for a Compensation Workbench plan.

Compensation Workbench Post Process

Run this process *after* all worksheet allocations have been approved.

Costing Process (Payroll)

Generates journal entries for your ledgers and costing information relating to labor costs.

CPFLine (Payroll) (Singapore)

Creates a file that you submit each month to the CPF Board for every legal entity in your enterprise. The report that is produced enables you to view the CPF contributions that are included in the file

Create and Maintain Company Cost Centers with Existing Organizations

This process creates company cost center organizations for each unique company cost center combination that has been defined in GL. This process is also available as part of the Synchronize GL Company Cost Centers with HR request set.

Create Federal HR Valid Combinations for the Grade KF (FD)

Federal Concurrent Manager process that supplies the predefined valid grade and pay plan combinations for the grade key flexfield.

Create Federal Special Info Types (FD)

Federal Concurrent Manager process that supplies the Federal Special Information types for the Person Special Information.

Credit Transfer Process (Payroll) (South Africa)

Marks employees with this payment method as paid.

Credit Transfer Cheque Payments Process (Payroll) (South Africa)

Produces an aggregated cheque per bank branch to be submitted with Deposit Schedules.

Default Enrollment Process (Advanced Benefits)

Run this process to enroll participants into the default benefit plan when participants have not made an election.

Direct Deposit (Singapore IBG Format) (Payroll) (Singapore)

Creates a payment file and report, run after PrePayments is complete for the payroll.

Direct Deposit Process (China - CCBS Format) (Payroll China)

This report produces a deposit advice in the correct format. This process generates two outputs:

- A hard copy called "Bank Transfer Report". This output provides a list of employees who had been processed in the Direct Deposit Process.
- A magnetic file for submission to the bank

Once the advice is transferred to the bank, the bank deposits the payments directly into the worker's account.

Bank Transfer Report (Payroll Korea)

This report produces a deposit advice in the correct format. This process generates two outputs, a hard copy and a magnetic file for submission to the bank. Once you transfer the advice to the bank, the bank deposits the payments directly into the worker's account.

Direct Entry (Australian BECS Format) Process (AU)

Produces a payment file for all employees.

Direct Entry (Reconciliation Report) (AU)

Produces a payment file for all employees. This file is the output version of the magtape sent to the government.

Electronic Lodgement of TFN Declaration report (.mf) (AU)

The Electronic Lodgement of TFN Declaration process allows you to produce a report for any new or changed TFN details for the employees in an organization. This file is the binary magtape file that is used for uploading to the government.

Electronic Lodgement of TFN Declaration report (.out) (AU)

The Electronic Lodgement of TFN Declaration process allows you to produce a report for any new or changed TFN details for the employees in an organization. This file is the output version of the magtape file that is sent to the government.

Download HRMS Taskflows Process

Run this process to export a task flow from your database to a flat file that you can then import to another database.

Duty Station Conversion Process (FD)

Moves employees from an old to a new Location

Electronic Tax File Process (Payroll) (South Africa)

Produces tax files in ASCII format.

Electronic UIF File Preprocess (South Africa)

This preprocess archives UIF information for the Electronic UIF File.

Electronic UIF File Process (South Africa)

The Electronic UIF File must be submitted on a monthly basis.

Enable Multiple Security Groups Process

Run this process when you first set up security groups enabled security.

End of Year Process (Payroll) (UK)

Produces statutory End of Year return to the Inland Revenue for employees in your enterprise.

Export GL Company Cost Center Process

The process is run for your current business group and writes information about GL company cost center combinations for companies that you have previously defined for your business group to a tab delimited file. It creates a record in the file for each unique company cost center combination that has been defined in GL.

Extract Definition Download to Data File

Copies a system extract definition to a file for upload to another business group or Oracle HRMS database.

Extract Definition Upload to Data File

Imports a copy of a system extract definition to a new business group or Oracle HRMS database.

Extract Process (Advanced Benefits)

Run the extract process to save the output of your system extract to the directory and file that you specified in your extract definition.

Extract Results Data Purge

On a periodic basis, run the purge process to free table space in the system extract results tables.

Extracting Information to Appear on the Payslip

Enables you to access the latest data relevant to the payslip, and copy it to archive tables.

Federal Benefits - TSP Conversion of Benefits (FD)

This process migrates converts the existing records for employees participating in TSP to the Benefits model.

Federal Benefits - TSP Catchup Conversion of Benefits (FD)

This process converts the existing records for employees participating in TSP Catch-Up to the Benefits model.

Forms Configurator – Download Template

Run this process to download one or more people management templates to a data file.

Forms Configurator – Upload Template

Run this process to upload a template to enable you to use it with the People Management Configurator (Forms Configurator) tool.

French PTO Accruals – Create Entitlements Process

Enables you to create entitlements from accruals, so that holidays may be spent.

French PTO Accruals – Obsolete Entitlements Process

Enables you to obsolete unspent entitlement.

Full Settlement Process (France) (Payroll)

This produces a letter in duplicate stating that the employee agrees that their termination has been concluded correctly.

Generate Overtime Payment Mapping Process (Payroll) (France)

Allows you to associate your overtime scheme with a payroll calendar.

Generate Secure User Process (SECGEN)

Run this process when you create a new security profile that references a reporting user.

Grant Permissions to Roles Process (ROLEGEN)

Dynamically grants select permissions on Oracle HRMS tables and views to the HR_REPORTING_USER role.

IR56B Archive Process (Payroll)(Hong Kong)

The IR56B Annual Employers Return Archive process stores employee and balance information, which is used in the IR56B Report and the Magnetic Tape process.

IR56B Magnetic Tape Process (Payroll) (Hong Kong)

The IR56B Magnetic Tape process produces the end of year magnetic tape from the Archived Information.

IR8A File (Payroll) (Singapore)

Creates a file that includes your employees' earnings for a specific tax year and legal entity. The process also creates a report for you to view the contributions that are included in the file.

IR8S File (Payroll) (Singapore)

Creates a file that includes your employees' and employers' earnings for a specific tax year and legal entity. The process also creates a report for you to view the contributions that are included in the file.

IRAS Line Archive (Payroll) (Singapore)

Archives the data that will later be used to create the year-end magnetic tapes.

Maintain Designee Eligibility (Advanced Benefits)

Run this process for those benefit plans that include an age factor in determining dependent eligibility.

Maintain Participant Eligibility Process (Standard Benefits)

Run this process if you license Standard Benefits and you want to determine benefits eligibility for a segment of your employee population. This process also de-enrolls currently enrolled participants who lose benefits eligibility and ends their associated benefits coverage and activity rate.

Manual Credit Transfer Cheque Payments (Payroll) (South Africa)

Updates system with cheque number of manually issued cheques.

Manual Payments (Payroll) (South Africa)

Updates system with manual payments made to employees.

Manually Issued Tax Certificates (Payroll) (South Africa)

Updates system with manually issued tax certificates numbers.

NACHA Process (Payroll) (US)

Produces files that you load on magnetic tape and despatch to banks for direct deposit payments.

P11D Benefits and Expenses Report (HR and Payroll) (UK)

Takes a P11D archive request ID and prints a selection of Class 1A benefits and expenses.

P11D Gaps and Overlaps Report (HR and Payroll) (UK)

Identifies a taxable benefit that is spread over multiple periods with a gap between each period, and also identifies taxable benefits of the same type that overlap each other within the same period.

P11D Magtape (HR and Payroll) (UK)

Generates a magnetic tape containing details of Class 1A NICs for reporting to the Inland Revenue.

Partial Period Accrual Calculation Process (Core Payroll, and enabled localizations)

Run this process to calculate accruals when the end of your accounting period occurs part way through a payroll period.

Participation Batch Process: Grade Step

Run this process to determine eligibility and electable choices for employees whom you want to progress using Grade/Step Progression.

Participation Batch Process: Life Event (Advanced Benefits)

Run this process to determine eligibility and electable choices for benefits participants based on a life event you select.

Participation Batch Process: Scheduled (Advanced Benefits)

Run this process to determine eligibility and electable choices for benefits participants based on a scheduled enrollment event.

Participation Batch Process: Selection (Advanced Benefits)

Run this process to determine eligibility for benefits participants. This process does not create electable choices.

Participation Process: Compensation

Run this process for Compensation Workbench prior to the availability of a plan for budget and worksheet entry.

Pay Advice Generation – Self Service (South Africa) (South Africa)

Archives balances and elements you define and other pay advice related information.

Payroll Run (Payroll) (France)

The Payroll Run is the regular method to process employee pay.

Payslip Generation – Self Service (UK)

Generate payslips for employees to view online through Oracle Self-Service.

Payslip Generator – Statement of Earnings (Payroll) (France)

This process generates pay advice data for all employees for a specified payroll and period.

Pension Extracts

These processes enable you to extract employee pension plan-related data for transfer to third-party providers.

Pension Extracts (Electronic Notification) (Netherlands)

This process extracts the pensions and social insurance data you require for the monthly notification report to ABP and UWV USZO.

Periodic Tax Filing (FLS) (Payroll) (US)

The Periodic Tax Filing Interface creates a flat file (.mf) containing the archived data from the External Process Archive in a format that can be directly submitted to Federal Liaison Services, Inc. (FLS) for tax filing and reporting.

Populate FEHB Program and Plan Design (FD)

This process populates the Federal Employee Health Benefits program and plan designs for use in professional user interface forms and self-service benefits.

Populate TSP Program and Plan Design (FD)

This process populates the US Federal Thrift Savings Plan programs and plan designs for use in professional user interface forms and self-service benefits.

Populate TSP Catchup Program and Plan Design (FD)

This process populates the Thrift Savings Plan Catch Up program and plan designs for use in professional user interface forms and self-service benefits.

PrePayments (French) Process (Payroll) (France)

Use this process to distribute employee pay over more than one payment method using either a percentage or monetary split. This process runs prepayments for one calendar month only.

PrePayments Process (Payroll)

Use this process to distribute employee pay over more than one payment method using either a percentage or monetary split.

Previous Services Validation (HR) (France)

Use this process to validate the employee's (titulaire) services for a period in which the employee has worked in some other public sector type organization as non-titulaires.

Printing the Payslip

Enables you to access the archived payslip information, and create a formatted file ready for printing and distributing to your employees.

Process Forfeitures (US)

Calculates--by participant--the total unspent contributions for a spending account benefits plan.

Process Future Dated RPAs (FD)

Set the frequency for processing future actions.

Prud'homme (Workers Election) Declaration Process (HR) (France)

Creates a statutory declaration which enables your employees to take part in the Industrial Tribunal elections.

Purge Backed-Out or Voided Life Events

Removes person data associated with backed-out or voided life events for Advanced Benefits and Compensation Workbench.

Recalculate Participant Values (Standard Benefits) (US)

Updates activity rates for currently enrolled benefits participants based on plan design changes.

As a prerequisite, you should run the Maintain Participant Eligibility process to update eligibility records and derived factors.

Register Extra Information Types (EITs)

Enables you to register the new Extra Information Types (EITs) that you create using the Descriptive Flexfield window.

Note: This process cannot be used to register organizational EITs.

Relieve Commitments

Run the Relieve Commitments request set to calculate budget commitments and post the results to Oracle General Ledger. The request set combines the Calculate Commitments process and the Commitment GL Posting process.

Remove Title from Person's Full Name

Run the Remove Title from Person's Full Name concurrent process to remove title from existing records without updating them.

RetroPay Process

Enables you to make back pay adjustments.

Retry Payroll Process

Retry a payroll process again.

Running the P45 EDI Process (UK)

Enables you to notify the Inland Revenue about employees who leave your employment.

Running the P45(3) EDI Process (UK)

Enables you to notify the Inland Revenue about a new starters information, or someone receiving a pension.

Running the P45 Process (UK)

Enables you to print and archive, or just archive specified P45's.

Running the P46 EDI Process (UK)

Enables you to provide information on new employees who cannot produce, or have never had a P45.

Running the P6 and P9 Upload Process (UK)

Run the process to upload the details about changes to an employee's tax code, or coding changes from the Inland Revenue.

Running the Works Number Update (UK)

Run to provide information on updated and new employee works numbers.

Saudi Payroll Archiver Process (Payroll) (SA)

Use this process to archive the payroll details for each payroll period for future reference. This supports production of Online Payslip and Payroll Register reports.

Saudi Payroll Upgrade Process (Payroll) (SA)

Use this process to migrate data from existing payroll runs and generate group reports for employees.

Security List Maintenance Process (PERSLM)

This process is usually run every night to maintain the lists of organizations, positions, payrolls, employees, and applicants that security profile holders can access.

Seed French Data Process (France)

This process creates and populates user defined tables using predefined lookup types and rows.

Start Automatic WGI (FD)

Schedule the Within Grade Increases (WGI) process to set the frequency with which the system processes automatic WGIs.

Start of Year Process (Payroll) (UK)

Usually performed at the start of the tax year to update tax information for each employee.

Synchronize GL Company Cost Centers with HR Request Set

This request set runs the following two processes:

- Create and Maintain Company Cost Center Organizations, page B-75
- Synchronize GL Company Cost Centers with Existing Organizations, page B-83

Synchronize GL Company Cost Centers with Existing Organizations

This process links existing and newly created company cost center organizations to GL account combinations, where a link does not already exist..

Synchronize Positions Process (FD)

This process updates the non-datetracked Positions table (PER_ALL_POSITIONS) with changes made to the datetracked table (HR_ALL_POSITIONS_F). When you run the process, any datetracked changes with an effective date on or before today are applied to the non-datetracked table.

Synchronize Salary Rates Process (France)

This process synchronizes the existing salary rates in the corps set up when you update the indemnity rates defined for your global pay scale. This match ensures that you use current compensation values in your pay scales.

Tax Batch Update Process (Germany)

The Tax Batch Update Process enables you to update the tax records for employees who have not submitted their tax cards for the current tax year. You can either run the process in report-only mode, which identifies the employees whose records would be subject to change, or in update mode to make the changes to the records.

Tax Credit Upload (Payroll) (Ireland)

The Tax Credit Upload process enables you to upload the tax credits of an employee from the data file provided by the Revenue. It also specifies standard rate cut-off amounts for each employee. The tax credit upload process validates the records provided by the Revenue and then uploads them into the PAY_IE_PAYE DETAILS_F table.

Tax Year End Data Validation and Preprocess (Payroll) (South Africa)

Preparation for issue of tax certificates.

Tax Year Start Process (Payroll) (South Africa)

Updates employee tax information at the start of each tax year.

Tax Year Start Rollback (Payroll) (South Africa)

Rolls back the actions performed in the Tax Year Start Process.

Termination Category Setup Process (Payroll) (South Africa)

Part of setup required for storing Employment Equity and UIF information.

Transfer to GL Process

Transfers the results of the costing process to the Accounting flexfield of Oracle General Ledger.

Upgrade from ADE to Web ADI

Run this process to convert styles used by Application Data Exchange (ADE) to integrators in Web Applications Desktop Integrator (Web ADI).

Upload GL Company Cost Center Information Request Set

Run the Upload GL Company Cost Center Information request set to upload the amended version of the exported file created using the Export GL Company Cost Centers process.

Upload HRMS Taskflows Process

Run this process to import a task flow to your database from a flat file exported from another database.

Upload Social Insurance Providers Process (Germany)

The Upload Social Insurance Providers Process enables you to upload a delivered list of social insurance providers to your German HR system.

Upload Tax Offices Process (Germany)

The Upload Tax Offices Process enables you to upload a delivered list of tax offices to your German HR system.

Upload Taxable Benefits (HR and Payroll) (UK)

The Taxable Benefits process enables you to upload a flat file of P11D elements to your P11D data repository.

Vehicle Mileage Calculation Information (Payroll) (UK)

Enters or deletes default mileage elements and rates tables for categories of vehicles in your business group.

Void Cheque Payments (Payroll) (South Africa)

Uploads details of canceled cheque payments.

Void Credit Transfer Cheque Payments (Payroll) (South Africa)

Voids aggregated cheque payments made to banks.

Void Payments Process (Payroll) (UK, US)

Allows you to void cheques that have been printed but need to be cancelled.

Wage and Tax Statement Form (Form W-2) (Payroll) (US)

The Wage and Tax Statement (Form W-2) is used by employers to report taxable and non-taxable income information of individual employees to the IRS and State governments.

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.

Absence

A period of time in which an employee performs no work for the assigned organization.

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 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 Plan

See: *PTO Accrual Plan*, page Glossary-22

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.

AdvancePay

A process that recalculates the amount to pay an employee in the current period, to make an authorized early payment of amounts that would normally be paid in future payroll periods.

Alert

An email notification that you can set up and define to send a recipient or group of recipients a reminder or warning to perform a certain task or simply a notification to inform the recipient of any important information.

API

Application Programmatic Interfaces, used to upload data to the Oracle Applications database. APIs handle error checking and ensure that invalid data is not uploaded to the database.

Applicant

A candidate for employment in a Business Group.

Applicant/Candidate Matching Criteria

Matching functionality in the iRecruitment system that systematically identifies which candidates and applicants possess the skills, knowledge and abilities to be considered for a specific vacancy. The following columns are used for matching:

- Skills
- FT/PT
- Contractor/Employee
- Work at Home
- Job Category
- Distance to Location
- Key Words
- Salary

Apply for a Job

An SSHR function that enables an employee to, apply, search and prepare applications for an internally advertised vacancy.

Appraisal

An appraisal is a process where an employee's work performance is rated and future objectives set.

See also: *Assessment*, page Glossary-3.

Appraisee

A person being appraised by an appraiser.

Appraiser

A person, usually a manager, who appraises an employee.

Appraising Manager

The person who initiates and performs an Employee-Manager or 360 Degree Appraisal. An appraising manager can create appraisal objectives.

Arrestment

Scottish court order made out for unpaid debts or maintenance payments.

See also: *Court Order*, page Glossary-8

Assessment

An information gathering exercise, from one or many sources, to evaluate a person's ability to do a job.

See also: *Appraisal*, page Glossary-3.

Assignment

A worker's assignment identifies their role within a business group. The assignment is made up of a number of assignment components. Of these, organization is mandatory, and payroll is required (for employees only) for payment purposes.

Assignment Number

A number that uniquely identifies a worker's assignment. A worker with multiple assignments has multiple assignment numbers.

Assignment Rate

A monetary value paid to a contingent worker for a specified period of time. For example, an assignment rate could be an hourly overtime rate of \$10.50.

Assignment Set

A grouping of employees and applicants that you define for running QuickPaint reports and processing payrolls.

See also: *QuickPaint Report*, page Glossary-23

Assignment Status

For workers, used to track their permanent or temporary departures from your enterprise and, for employees only, to control the remuneration they receive. For applicants, used to track the progress of their applications.

Authoria

A provider of health insurance and compensation information, that provides additional information about benefits choices.

BACS

Banks Automated Clearing System. This is the UK system for making direct deposit payments to employees.

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.

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* , page Glossary-21

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.

Base Summary

A database table that holds the lowest level of summary. Summary tables are populated and maintained by user-written concurrent programs.

Behavioral Indicators

Characteristics that identify how a competence is exhibited in the work context.

See also: *Proficiency Level* , page Glossary-22

Beneficiary

A person or organization designated to receive the benefits from a benefit plan upon the death of the insured.

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*, page Glossary-11

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*, page Glossary-24, *Field*, page Glossary-12

Budget Measurement Type (BMT)

A subset of Workforce Measurement Type. It consists of a number of different units used to measure the workforce. The most common units are headcount and full time equivalent.

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.

Cafeteria Benefits Plan

See: *Flexible Benefits Program*, page Glossary-12

Calendar Exceptions

If you are using the Statutory Absence Payments (UK) feature, 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.

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. If you are using the Statutory Absence Payments (UK) feature, you define calendars to determine the start date and time for SSP qualifying patterns.

Canada/Quebec Pension Plan (CPP/QPP) Contributions

Contributions paid by employers and employees to each of these plans provide income benefits upon retirement.

Candidate

(iRecruitment) A candidate is a person who has either directly provided their personal and professional information to a company's job site or provided their resume and details to a manager or recruiter for entering in the iRecruitment system.

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*, page Glossary-25

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.

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.

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.

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*, page Glossary-11

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.

See also: *Unit Standard Competence*, page Glossary-29

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*, page Glossary-7, *Core Competencies*, page Glossary-8

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.

Consideration

(iRecruitment) Consideration means that a decision is registered about a person in relation to a vacancy so that the person can be contacted.

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.

Content

When you create a spreadsheet or word processing document using Web ADI, the content identifies the data in the document. Content is usually downloaded from the Oracle application database.

Contingent Worker

A worker who does not have a direct employment relationship with an enterprise and is typically a self-employed individual or an agency-supplied worker. The contingent worker is not paid via Oracle Payroll.

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*, page Glossary-7

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*, page Glossary-3

Credit

A part of the Qualifications Framework. The value a national qualifications authority assigns to a unit standard competence or a qualification. For example, one credit may represent 10 hours of study, a unit standard competence may equate to 5 credits, and a qualification may equate to 30 credits.

Criteria Salary Rate

Variable rate of pay for a grade, or grade step. Used by Grade/Step Progression.

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 Earned

The date the payroll run uses to determine which element entries to process. In North America (and typically elsewhere too) it is the last day of the payroll period being processed.

Date Paid

The effective date of a payroll run. Date paid dictates which tax rules apply and which tax period or tax year deductions are reported.

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*, page Glossary-9, *Effective Date*, page Glossary-10

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*, page Glossary-10

Default Postings

(iRecruitment) Default text stored against business groups, organizations, jobs, and/or positions. The default postings are used to create job postings for a vacancy.

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*, page Glossary-30

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* , page Glossary-15

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*, page Glossary-12

Direct Deposit

The electronic transfer of an employee's net pay directly into the account(s) designated by the employee.

Discoverer Workbook

A grouping of worksheets. Each worksheet is one report.

Discoverer Worksheet

A single report within a workbook. A report displays the values of predefined criteria for analysis.

Distribution

Monetary payments made from, or hours off from work as allowed by, a compensation or benefits plan.

Download

The process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

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*, page Glossary-9

EIT

See: *Extra Information Type*, page Glossary-12

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.

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*, page Glossary-24, *Nonrecurring Elements*, page Glossary-18

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*, page Glossary-27

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 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

A worker who has a direct employment relationship with the employer. Employees are typically paid compensation and benefits via the employer's payroll application.

Employee Histories

An SSHR function for an employee to view their Learning 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 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.

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.

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. Known as *class* in OLM.

Ex-Applicant

Someone who has previously applied for a vacancy or multiple vacancies, but all applications have ended, either because the applicant has withdrawn interest or they have been rejected. Ex-Applicants can still be registered users.

Expected Week of Childbirth (EWC)

In the UK, this is the week in which an employee's baby is due. The Sunday of the expected week of childbirth 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*, page Glossary-10

Field

A view or entry area in a window where you enter, view, update, or delete information.

See also: *Block*, page Glossary-5, *Region*, page Glossary-24

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*, page Glossary-5, *Region*, page Glossary-24, *Field*, page Glossary-12

Full Time Equivalent (FTE)

A Workforce Measurement Type (WMT) that measures full time equivalent. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

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 Ladder

The key component of Grade/Step Progression. You use a grade ladder to categorize grades, to determine the rules for how an employee progresses from one grade (or step) to the next, and to record the salary rates associated with each grade or step on the ladder.

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*, page Glossary-19

Grade Step

An increment on a grade scale. Each grade step corresponds to one point on a pay scale.

See also: *Grade Scale*, page Glossary-13

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..

Headcount(HEAD)

A Workforce Measurement Type (WMT) that measures headcount. Although the actual value and calculation may vary, this value is taken from the Assignment Budget Value (ABV) in Oracle HRMS. If the Assignment Budget Value in Oracle HRMS is not set up then a FastFormula is used to determine the value to be calculated.

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.

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.

Info Online

A generic framework to integrate Oracle applications with partner applications, enabling users to access information from third-party providers, Metalink and Learning Management.

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.

Integrator

Defines all the information that you need to download or upload from a particular window or database view using Web ADI.

Interface

A Web ADI term for the item that specifies the columns to be transferred from the Oracle applications database to your desktop or vice versa.

Involuntary

Used in turnover to describe employees who have ceased employment with the enterprise not of their own accord, for example, through redundancy.

Job

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

Job Posting

An advertisement for a specific vacancy. This is the public side of the vacancy for which a candidate would apply.

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*, page Glossary-10

Key Performance Indicator (KPI)

Target values that you set for the performance of your enterprise. This value comes from the corresponding KPI Portlet/Report. You can configure the Performance Management Framework to send a notification when actual performance falls short of, or exceeds, the target value. For example, you may configure the Performance Management Framework to send you a notification when workforce variance is greater than 10 percent, or when training success is below 50 percent.

Key Performance Indicator (KPI) Portlet/Report

Displays the executive summary of key measures such as total headcount and total salary.

Layout

Indicates the columns to be displayed in a spreadsheet or Word document created using Web ADI.

Learning Management

Oracle's enterprise learning management system that administers online and offline educational content.

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.

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.

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.

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).

Manager

(iRecruitment) A manager accesses the iRecruitment system to document their hiring needs and conduct their recruiting activities online. Specifically, these activities include vacancy definition, searching for candidates, and processing applicants through the vacancy process.

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.

Mapping

If you are bringing in data from a text file to Oracle HRMS using a spreadsheet created in Web ADI, you need to map the columns in the text file to the application's tables and columns.

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.

Medicare Levy

An amount payable by most taxpayers in Australia to cover some of the cost of the public health system.

Menus

You set up your own navigation menus, to suit the needs of different users.

My Account

(iRecruitment) My Account is the total of either a candidate or applicant's personal and vacancy-specific information including the information needed to manage their progress through the recruitment process.

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*, page Glossary-24

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.

OLM

Oracle Learning Management.

Online Analytical Processing (OLAP)

Analysis of data that reveals business trends and statistics that are not immediately visible in operational data.

Online Transactional Processing (OLTP)

The storage of data from day-to-day business transactions into the database that contains operational data.

Open Enrollment

A type of scheduled enrollment in which participants can enroll in or alter elections in one or more benefits plans.

Oracle FastFormula

Formulas are generic expressions of calculations or comparisons you want to repeat with different input values. With Oracle FastFormula you can write formulas using English words and basic mathematical functions. The output of FastFormulas is fed back into reports.

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.

Outcome

For a unit standard competence, a behavior or performance standard associated with one or more assessment criteria. A worker achieves a unit standard competence when they achieve all outcomes for that competence.

Overrides

You can enter overrides for an element's pay or input values for a single payroll period. This is useful, for example, when you want to correct errors in data entry for a nonrecurring element before a payroll run.

Parameter Portlet

A portlet in which you select a number of parameters that may affect all your portlets on your page. These may include an effective date, the reporting period, the comparison type, the reporting manager, and the output currency for your reports. The parameter portlet is usually available at the top of the portal page.

Pattern

A pattern comprises a sequence of time units that are repeated at a specified frequency. The Statutory Absence Payments (UK) feature, 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*, page Glossary-13

Pay Value

An amount you enter for an element that becomes its run item without formula calculations.

See also: *Input Values*, page Glossary-14

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.

Payroll Reversal

A payroll reversal occurs when you reverse a payroll run for a single employee, in effect cancelling the run for this employee.

Payroll Rollback

You can schedule a payroll rollback when you want to reverse an entire payroll run, cancelling out all information processed in that run. To preserve data integrity, you can roll back only one payroll at a time, starting with the one most recently run.

Payroll Run

The process that performs all the payroll calculations. You can set payrolls to run at any interval you want.

People List

An SSHR line manager utility used to locate an employee.

Performance Management Framework (PMF)

A business intelligence tool used to alert users to exceptional circumstances, as defined by KPIs. When a particular factor measured by HRMSi goes beyond a threshold chosen by the user, the system sends the user a workflow notification.

Performance Management Viewer (PMV)

A reporting tool that displays the report that corresponds to one or more PMF targets.

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)*, page Glossary-21, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Period of Incapacity for Work (PIW)

In the UK, this is a period of sickness that lasts four or more days in a row, and is the minimum amount of sickness for which Statutory Sick Pay can be paid. If a PIW is separated by less than the linking interval, a linked PIW is formed and the two PIWs are treated as one.

Period of Placement

The period of time a contingent worker spends working for an organization. A contingent worker can have only one period of placement at a time although they can have multiple assignments during that time.

Period Type

A time division in a budgetary calendar, such as week, month, or quarter.

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.

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.

Personnel Actions

Personnel actions is a public sector term describing business processes that define and document the status and conditions of employment. Examples include hiring, training, placement, discipline, promotion, transfer, compensation, or termination. Oracle HRMS uses the term *self-service actions* synonymously with this public sector term. Oracle Self Service Human Resources (SSHR) provides a configurable set of tools and web flows for initiating, updating, and approving self-service actions.

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)*, page Glossary-20, *Competence*, page Glossary-7, *Assessment*, page Glossary-3

Proficiency Level

A system for expressing and measuring how a competence is exhibited in the work context.

See also: *Behavioral Indicators*, page Glossary-4.

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*, page Glossary-19

Prospect Pool

(iRecruitment) The prospect pool contains all registered users who have given permission for their information to be published.

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 (PTO). 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.

QPP

(See Canada/Quebec Pension Plan)

QA Organization

Quality Assurance Organization. Providers of training that leads to Qualifications Framework qualifications register with a QA Organization. The QA Organization is responsible for monitoring training standards.

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*, page Glossary-7

Qualifications Framework

A national structure for the registration and definition of formal qualifications. It identifies the unit standard competencies that lead to a particular qualification, the awarding body, and the field of learning to which the qualification belongs, for example.

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*, page Glossary-27

Qualifying Week

In the UK, this is the week during pregnancy that is used as the basis for the qualifying rules for Statutory Maternity Pay (SMP). The date of the qualifying week is fifteen weeks before the expected week of confinement and an employee must have been continuously employed for at least 26 weeks continuing into the qualifying week to be entitled to SMP.

Quebec Business Number

In Canada, this is the employer's account number with the Ministère du Revenu du Québec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

An SSHR function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, page Glossary-3

QuickPay

QuickPay allows you to run payroll processing for one employee in a few minutes' time. It is useful for calculating pay while someone waits, or for testing payroll formulas.

Ranking

(iRecruitment) A manually entered value to indicate the quality of the applicant against other applicants for a specific vacancy.

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*, page Glossary-22

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*, page Glossary-18, *Standard Link*, page Glossary-27

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*, page Glossary-5, *Field*, page Glossary-12

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.

Registered User

(iRecruitment) A person who has registered with the iRecruitment site by entering an e-mail address and password. A registered user does not necessarily have to apply for jobs.

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*, page Glossary-25

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*, page Glossary-6

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*, page Glossary-26, *User Profile Options*, page Glossary-30, *Request Groups*, page Glossary-24, *Security Groups*, page Glossary-24

Resume

A document that describes the experience and qualifications of a candidate.

RetroPay

A process that recalculates the amount to pay an employee in the current period to account for retrospective changes that occurred in previous payroll periods.

Retry

Method of correcting a payroll run or other process *before* any post-run processing takes place. The original run results are deleted and the process is run again.

Revenue Canada

Department of the Government of Canada which, amongst other responsibilities, administers, adjudicates, and receives remittances for all taxation in Canada including income tax, Employment Insurance premiums, Canada Pension Plan contributions, and the Goods and Services Tax (legislation is currently proposed to revise the name to the Canada Customs and Revenue Agency). In the province of Quebec the equivalent is the Ministère du Revenu du Québec.

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.

Reviewer (SSHR)

A person invited by an appraising manager to add review comments to an appraisal.

RIA

Research Institute of America (RIA), a provider of tax research, practice materials, and compliance tools for professionals, that provides U.S. users with tax information.

Rollback

Method of removing a payroll run or other process *before* any post-run processing takes place. All assignments and run results are deleted.

Rollup

An aggregate of data that includes subsidiary totals.

Run Item

The amount an element contributes to pay or to a balance resulting from its processing during the payroll run. The Run Item is also known as calculated pay.

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.

Salary Rate

The rate of pay associated with a grade or step. Used by Grade/Step Progression.

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.

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.

Security Group

Security groups enable HRMS users to partition data by Business Group. Only used for Security Groups Enabled security.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26, *User Profile Options*, page Glossary-30

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*, page Glossary-25

Self Appraisal

Part of the SSHR Appraisal function. This is an appraisal undertaken by an employee to rate their own performance and competencies.

Site Visitor

(iRecruitment) A person who navigates to the iRecruitment web site and may view job postings. This person has not yet registered or logged in to the iRecruitment system. This individual may search for postings on the web site and also has the ability to log in or register with the iRecruitment site.

SMP

See: *Statutory Maternity Pay*, page Glossary-28

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 Ministère du Revenu du Québec 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.

Special Run

The first run of a recurring element in a payroll period is its normal run. Subsequent runs in the same period are called special runs. When you define recurring elements you specify Yes or No for special run processing.

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*, page Glossary-28

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 HRMS Security

The standard security model. Using this security model you must log on as a different user to see a different Business Group.

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*, page Glossary-11, *Recurring Elements*, page Glossary-24

Statement of Commissions and Expenses for Source Deduction Purposes (TP 1015.R.13.1)

A Ministère du Revenu du Québec 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 Earnings (SOE)

A summary of the calculated earnings and deductions for an assignment in a payroll period.

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 Adoption Pay

In the UK, Statutory Adoption Pay (SAP) is payable to a person of either sex with whom a child is, or is expected to be, placed for adoption under UK law.

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.

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.

Statutory Paternity Pay

In the UK, Statutory Paternity Pay Birth (SPPB) is payable to a person supporting the mother at the time of birth. In cases of adoption, the primary carer receives Statutory Adoption Pay, while the secondary carer receives Statutory Paternity Pay Adoption (SPPA).

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.

Supplier

An internal or external organization providing contingent workers for an organization. Typically suppliers are employment or recruitment agencies.

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.

Tax Point

The date from which tax becomes payable.

Template Letter

Form letter or skeleton letter that acts as the basis for creating mail merge letters. The template letter contains the standard text, and also contains field codes, which are replaced by data from the application during the mail merge process.

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.

Transcendentive

A third-party compensation management solutions provider, that provides additional information about benefits choices.

Unit Standard

A nationally registered document that describes a standard of performance. The standard is typically defined and maintained by industry representatives.

Unit Standard Competence

A competence that is defined in a Unit Standard and linked to a Qualifications Framework qualification.

Upload

The process of transferring the data from a spreadsheet on your desktop, created using Web ADI, back to the Oracle HRMS application.

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*, page Glossary-4

User Profile Options

Features that allow system administrators and users to tailor Oracle HRMS to their exact requirements.

See also: *Responsibility*, page Glossary-25, *Security Profile*, page Glossary-26

User-based Security

With this type of security, the application generates the security permissions for a current user when that user logs on to a system. The system uses the security profile (can be position, supervisor, or organization-based, for example) to generate security permissions for the current user, for example, based on the user's position. An alternative to user-based security is a security profile with defined security rules, for example, to specify that the top-level position for a position-based security profile is Position A, irrespective of the current user's position.

View

An example of an interface that you can use to download data from the Oracle HRMS application to a spreadsheet using Web ADI.

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.

Viewer (Web ADI)

A desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS via Web ADI.

Voluntary

Term used in turnover to describe employees who have ceased employment with the enterprise of their own accord, for example, by resigning.

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.

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.

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

An employee or a contingent worker.

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.

Workforce Measurement Type (WMT)

Groups of different units combined to measure the workforce. The most common units are headcount and full time equivalent.

Workforce Measurement Value (WMV)

A WMT value, for example, headcount or FTE.

Work Structures

The fundamental definitions of organizations, jobs, positions, grades, payrolls and other employee groups within your enterprise that provide the framework for defining the work assignments of your employees.

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