

Oracle® Human Resources Management Systems

Configuring, Reporting, and System Administration Guide

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A Windows and their Navigation Paths

B Reports and Processes in Oracle HRMS

HRMS Glossary

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Oracle Human Resources Management Systems Configuring, Reporting, and System Administration Guide, Release 11i

Part No. A95418-02

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 Configuring, Reporting, and System Administration 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 xiv for more Oracle Applications product information.

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Structure

- 1 Security Rules**
- 2 Desktop Integration**
- 3 Extending Oracle HRMS**
- 4 Workforce Intelligence**
- 5 Interface Configuration**
- 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 Self-Service Human Resources 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 *OracleMetaLink* 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 *OracleMetalink*.

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.

Security Rules

Security Overview

Defining which records and information users can access is fundamental to HRMS security.

As part of your implementation plan, you identify who will use Oracle HRMS, what information they require, and how they use it. You can control a user's access to database elements such as records, fields, forms, and functions, and you can also control a user's access to other user records and data.

All Oracle Applications users access the system through a responsibility that is linked to a security group and a security profile. The responsibility is the primary means of defining security. The security group determines which business group the user can access. The security profile determines which records (related to organizations, positions and payrolls) the user can access within the business group. For example, you can restrict a manager's security permissions so that the manager can only access the person records for those employees and workers within a supervisor hierarchy. This restriction enables secure, reliable data access and ensures that only people with the correct permissions can access personal data.

See: Responsibilities, page 1-93

Security and Business Groups

In general, a user can only view the records for one business group at a time. However, depending on the value of the HR:Cross Business Group Profile option, you can view specific information across business groups. See: User Profiles, page 1-46

See also: Single and Multiple Business Groups, *Oracle HRMS Enterprise and Workforce Management Guide*

Within a business group you can control:

- *Who* the user can access, using security profiles. You can restrict access by:
 - organization hierarchy
 - position hierarchy
 - supervisor hierarchy
 - payroll
 - supervisor assignment

You can also create your own custom restrictions and combine them with the standard restrictions.

Note: You can configure the above security restrictions to be user-based. The application evaluates the security permissions dynamically for the user currently logged on to the system. User-based security profiles can be used by multiple employees which reduces set-up and administration tasks.

- *What* the user can access. You control user access to specific functions using function security. You attach functions to menus which you then attach to responsibilities. By linking the functions to responsibilities, you can restrict which users can access particular functions, and on which menus the functions appear. By modifying the function parameter information, you can define how the function operates and processes information.

See: Menus, page 1-94

See: Defining Menu Functions, page 1-98

Key Concepts

For more detailed information on security concepts, see:

- Security Models, page 1-5
- Security Profiles, page 1-23
- Responsibilities, page 1-93
- Security Processes, page 1-14

Security Rules

You can set up and maintain security of access for different classes of users. Once you have identified who will use Oracle HRMS, what information they require, and how they will use it, you can group together users with similar requirements and give them the same view of the system.

AuditTrail is an Oracle HRMS system administration task which enables you to track and record changes to your data.

In what ways can you use security of access for different users?

You can set up menus using structures and names that make sense to the users. You can also restrict the data users can view and edit in certain windows, so they only see what they need to see.

This provides security for your data and an efficient interface designed for your users' needs.

How does Oracle HRMS allow data restriction for display in a window?

If you want different users to view the same window for different purposes, you can restrict their views in different ways. For example, you can:

- Limit access to list of values for faster data entry

- Limit access to certain types of information

For example, you might create a configured version of the View Element Entry History for Employee form that does not display the earnings elements representing salary, bonus and commission. Most users' menus would only give them access to this configured version of the form. Those authorized to view salary, bonus and commission figures can have a menu function defined to allow access to the standard version of the form.

How does Oracle HRMS enable users to view multiple business groups?

Oracle HRMS is installed with two security models, each enabling you to set up security for an enterprise which uses multiple business groups. Using either model you can only view records for one business group at any one time, *except* in cases where the HR:Cross Business Group user profile allows access to specific fields across all business groups. See: User Profiles, page 1-46.

The difference between the models is as follows:

- Using Standard HRMS Security you can only link one business group to one responsibility. You must set up different responsibilities for each business group.
- Using Security Groups Enabled Security you can set up more than one business group for a single responsibility. However, you still only view records for one business group at a time.

What does AuditTrail provide?

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

Can you link windows together?

Yes. Oracle recognizes that to complete many tasks, you need to use more than one window. You can link these windows together in a *task flow* so that you can choose a button to bring up each window in turn without returning to the menu.

Security in Oracle HRMS

Key Concepts

The following definitions describe the key concepts in Oracle HRMS security.

Menu Structures

Using *menu structures*, you can limit the functions a user can access. You can also restrict access to *information types* by choosing which information types a user can view.

You can also create multiple versions of the same form, each one used for just one task. This approach restricts the list of values on certain fields and therefore provides for faster data entry. It also enables you to limit access to certain types of information.

Reporting Access

You can set up access restrictions for employees who never use the product's windows and do not change database information, but do access the database.

Request Groups

You can specify which processes and reports a reporting user can run by setting up *request groups*. Within the request group, you use security profiles to restrict the records accessed by the reporting user, who may run reports against the system without having online access through the system's forms.

Responsibility

The *responsibility* is your primary means of defining security. Business groups, menu structures, task flows, and information types are linked to a responsibility.

Security Groups

Security groups are a method of partitioning data. If you are using the Security Groups Enabled security model, you can manage information for multiple business groups using one responsibility. This is particularly useful if you are a Service Center. Security Groups Enabled security is also useful for organizations using Oracle Self Service HR and organizations with employees that must access and manage records from different business groups.

Security Models

The two security models, Standard HRMS Security (Security Groups Disabled) and Security Groups Enabled security (formerly called Cross Business Group Responsibility Security), both control security by restricting who and what the user can see. What differs is how you set up security, menus and how users log in. For more detailed information about each of the security models, see Security Models, page 1-5.

Security Processes

System security processes enable you to:

- Grant permissions to a new reporting user.

- Maintain the lists of organizations, positions, payrolls, employees and applicants that security profile holders can access.
- Set up and update your system to use the Security Groups Enabled security model.

Security Profiles

By defining *security profiles*, you can control access to records of employees at or above a certain level in an organization. For example, you can give a department's administrator access to all department employee records except those of the manager and assistant manager.

User Profiles

A *user profile* is a set of changeable options that affects the way your application runs. You can set user profile options at site level, application level, responsibility level and user level.

You can restrict access to query-only for all or a selection of your HR and Payroll forms using a user profile option and the parameter QUERY_ONLY=YES at form function level.

Security Models

Oracle HRMS provides two different security models which enable you to set up security specifically for your enterprise: Standard HRMS security and Security Groups Enabled security (formerly called Cross Business Group Responsibility Security).

Note: If you want to set up security for employees who can access the database, but do not change database information, see: Reporting Access, page 1-13 and Setting Up Reporting Users, page 1-21.

A further option exists which enables users to simultaneously view selected fields from all business groups in your organization regardless of the security model. For more information see HR: Cross Business Group Profile option, page 1-46.

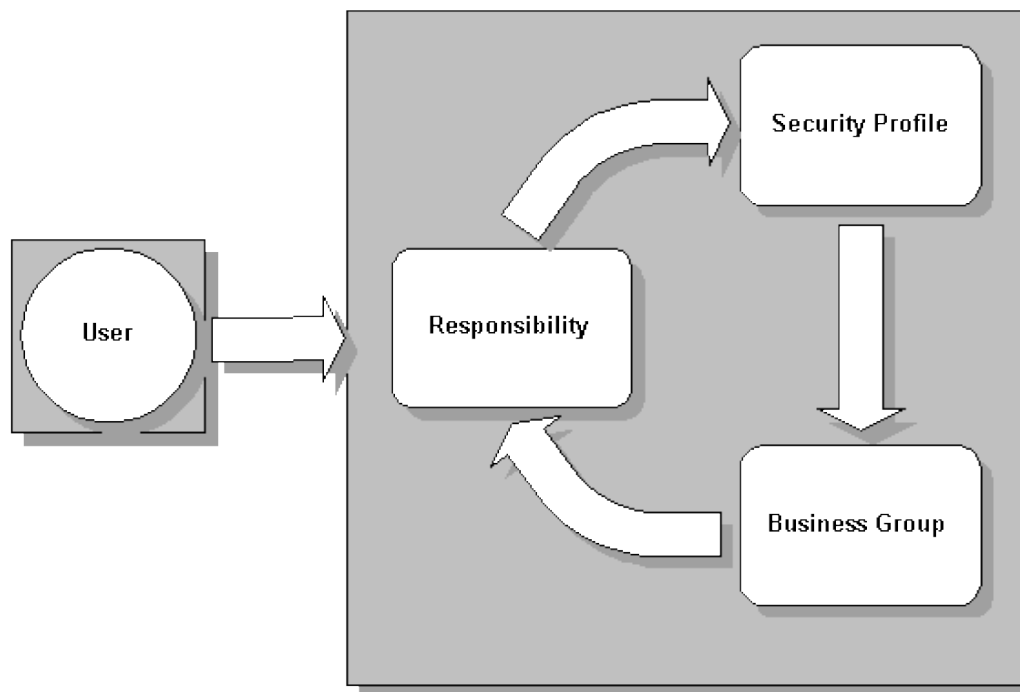
Standard Security Model

Standard HRMS security restricts access to your enterprise's records and data. To set up Standard HRMS Security, you first create responsibilities and then define the windows, menus items, workflows, data and records the user can access. The System Administrator then assigns users to as many of these responsibilities as is required to complete their business tasks.

If you are using Standard HRMS Security, you must ensure that the Enable Multiple Security Groups profile option is set to the default value No. You must then create a security profile for each distinct security grouping of employees your enterprise requires.

You then create a responsibility for each user type you require, for example HR Manager, Branch Manager and Salesperson, and link the security profile and responsibility to a business group. These three elements create a security grouping to which you assign employees.

Assigning Users to a Responsibility, Security Profile, and Business Group



Note: Each security grouping you create restricts access to the business group to which the security profile and responsibility are assigned.

By assigning users to the security grouping, you grant them access to the records, menus and data defined in the security profile and responsibility. You can add further users to this security component, but you cannot re-use the security profile and responsibility within another business group.

Your enterprise can also set up request groups to restrict user access to reports and processes. The request group is associated with a security profile which defines the data a user can view, and is then assigned to a responsibility. It is also possible to set up reporting only request groups for users who access the database, but who are not permitted to change any of the records within the system.

For more information, see *Setting up Standard Security*, page 1-15.

Access to Multiple Business Groups using Standard Security

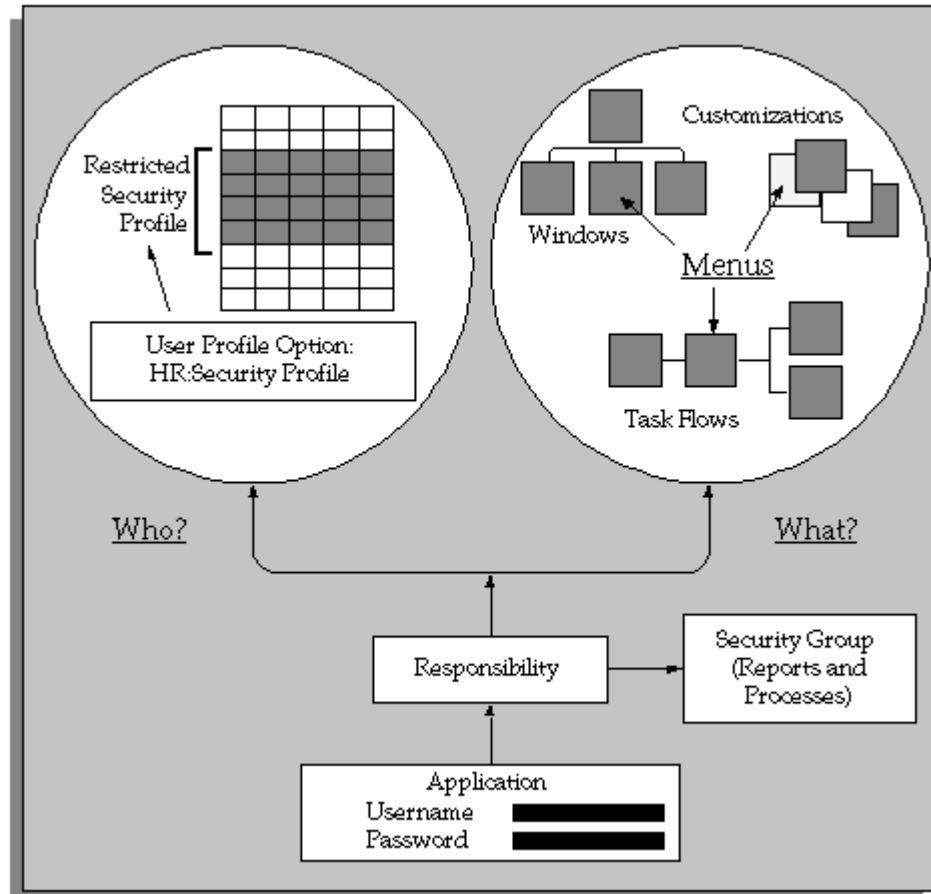
In Standard HRMS Security, you can grant users access to more than one business group within your enterprise. To do this, you must create security profiles and responsibilities and assign them to each additional business group. If a user's responsibility is assigned to more than one business group, they will not be able to view data from more than one business group at any time.

Note: The HR: Cross Business Group Profile option enables users to view some limited information across all business groups within an enterprise. For more information, see *HR: Cross Business Group Profile option*, page 1-46.

Standard HRMS Security (Security Groups Disabled) is commonly used in organizations which operate within a single legislation and a single business group.

Important: After setting up Standard HRMS Security, you can switch to the Security Groups Enabled security model. You *cannot*, however, to revert back to Standard HRMS Security after this change has been made.

The Completed Standard HRMS Security Model



Security Groups Enabled Model

The main difference between the two security models is that the Security Groups Enabled model enables your enterprise to share security profiles and responsibilities between users and business groups. This reduces the set up time, and also increases the flexibility of this security model. The key to re-usability is the relationship between the security elements and the users that you create during the set up process.

Important: Once you have set up Security Groups Enabled security, you *cannot* revert to Standard HRMS Security.

Access to Multiple Security Groups using Security Groups Enabled Model

The Security Groups Enabled security model enables you to assign a single responsibility to more than one business group, and hence enable users to access records from

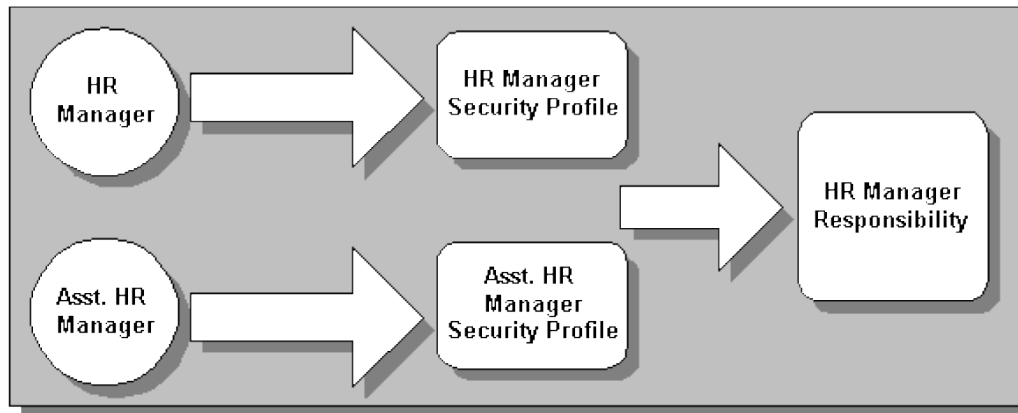
numerous business groups, although users cannot view information from different business groups simultaneously.

To set up Security Groups Enabled security, you set the Enable Security Groups Profile option to Yes, and run the Enable Multiple Security Groups process. These steps in combination create a Security Group which has the same name as the business group from which it was created. For more information, see Security Groups, page 1-11.

Note: To make the administration of your security setup easy to maintain, it is recommended that you leave the names of the Security Groups the same as your business groups.

Like Standard HRMS Security, your enterprise must create Security Profiles for each distinct security grouping within your enterprise. Security Profiles function slightly differently in the Security Groups Enabled model than they do in Standard HRMS security. Rather than one security profile being assigned to one responsibility, Security Groups Enabled security enables your enterprise to assign numerous security profiles to a responsibility. For example, an HR Manager and an Assistant HR Manager may be able to access the same menus and windows, but may be able to view different data. The following example illustrates the benefits of this function.

Assigning Multiple Security Profiles to a Responsibility



Note: The limitation of this is that a user can only be assigned one Security Profile per responsibility.

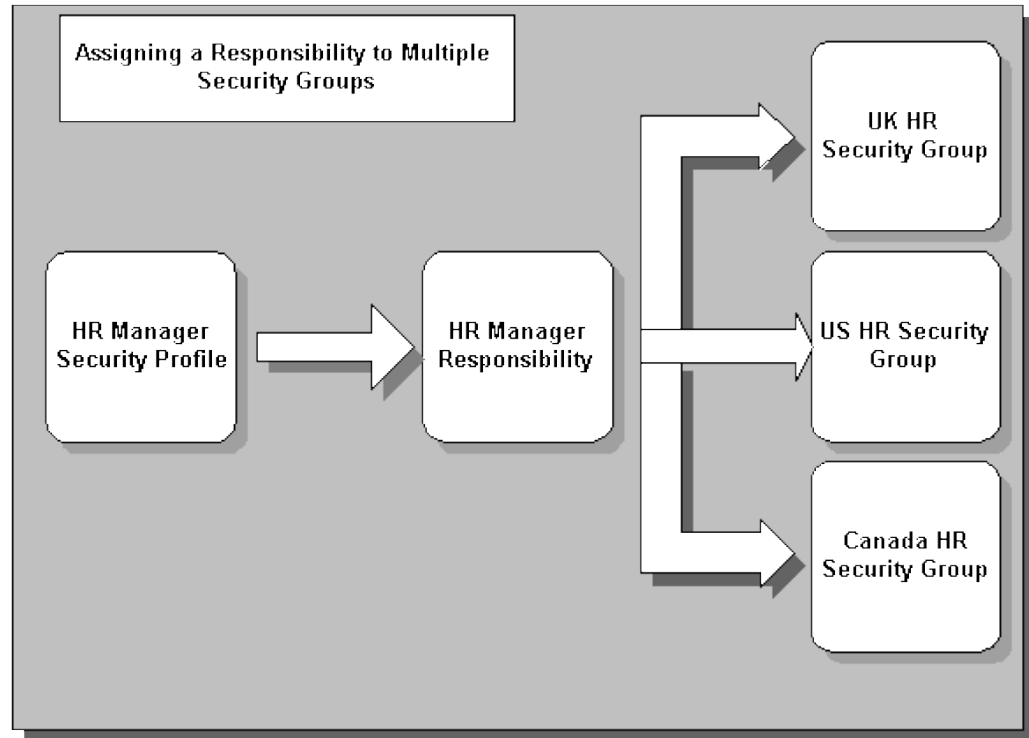
The functionality of responsibilities is also enhanced in the Security Groups Enabled security model. Increasingly, users require access to the records in more than one business group. To accomplish this, you can assign a responsibility to multiple business groups when you use Security Groups Enabled. The records, forms and type of data a user can access will be the same in each of the business groups to which they have access.

Note: When a responsibility is assigned to more than one business group, the user can only view records from one business group at any time.

The ability to assign one responsibility to multiple business groups makes the set up of security quicker and more efficient.

Note: The HR: Cross Business Group Profile Option enables users to view some information across all business groups within an enterprise. For more information, see HR: Cross Business Group Profile option, page 1-46.

Assigning a Responsibility to Multiple Security Groups

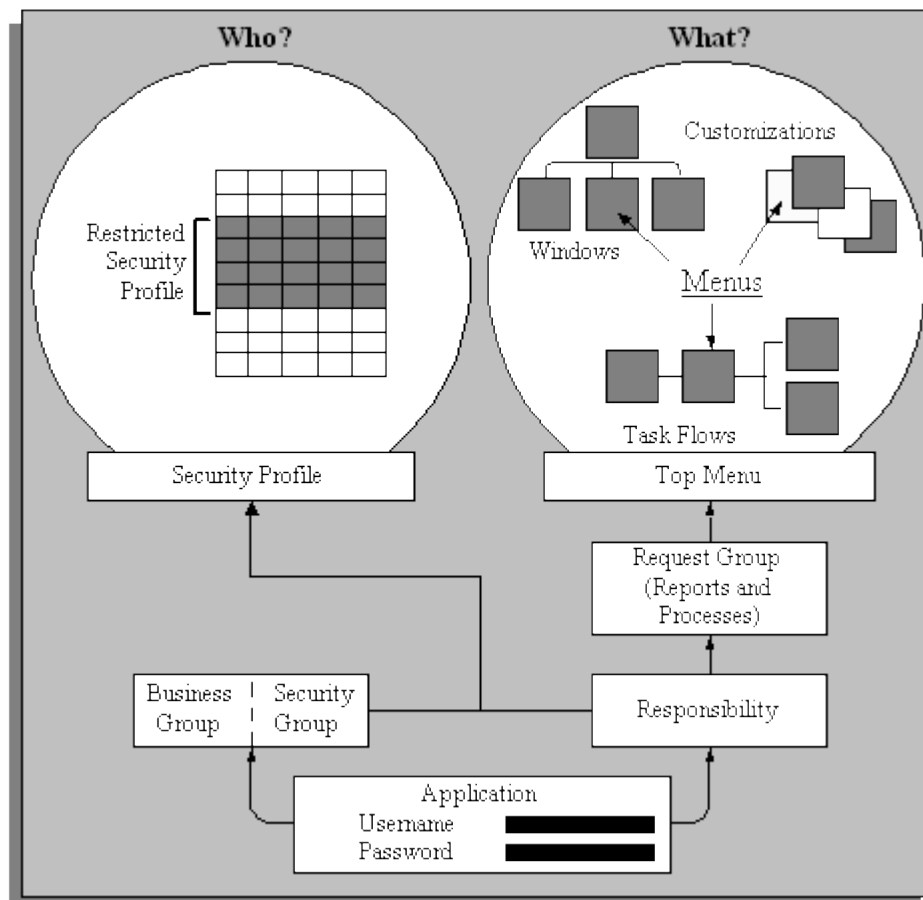


As with Standard HRMS Security, you can set up a request group to restrict user access to reports and processes. The request group is associated with a responsibility which defines the data a user can view. It is also possible to set up reporting only request groups for users who access the database, but who are not permitted to change any of the records within the system.

Once your enterprise has defined the security profiles and responsibilities, you must assign them to the relevant security groups. The final stage is to assign users to this group of information. The example below illustrates how the final security set up may look within your enterprise.

For more information see Setting Up Security Groups Enabled Security, page 1-16.

The Completed Security Groups Enabled Model



Three distinct enterprise types can benefit from the functionality offered by the Security Groups Enabled model; Service Centers, Multinationals and SSHR enterprises. Of course, the simplified set up and maintenance is of benefit to any enterprise.

Typically, Service Centers create a new business group for each customer they serve. Furthermore, Service Centers only require one responsibility and security profile to enable users to access and change data within the system. As the Security Groups Enabled model enables sharing of security profiles and responsibilities, the security set up process for Service Centers becomes quicker and more efficient.

In the case of Multinational enterprises, it is common to create a business group for each country in which the enterprise operates, and for each legislation the enterprise uses. Using the Security Groups Enabled model enables users to share records and data across business groups and countries.

For enterprises that use SSHR within a global implementation, the advantages of using Security Groups Enabled include quicker set up and easier maintenance. An additional benefit is that transferring employees or employee information between business groups is simplified.

Security Groups (Security Groups Enabled Model Only)

When you use the Security Groups Enabled security model (formerly called Cross Business Group Responsibility security), a security group is automatically created for each business group when you run the Enable Multiple Security Group Process. Because security groups are tied to business groups by set up, partitioning data using this method is the same as partitioning data by business group. See: Setting Up Security Groups Enabled security, page 1-16.

Important: Security groups are only used if you have set up your enterprise using the Security Groups Enabled security model.

Security groups are the key component in Security Groups Enabled security. They enable you to set up one responsibility and link this to a number of different business groups.

Before you can start using this security model you ensure that HRMS is set up to use security groups. To do this you set the Enable Security Groups profile option to Yes and run the Enable Multiple Security Group process.

Important: You can change from Standard HRMS security to Security Groups Enabled security, however, you *cannot* switch from Security Groups Enabled security back to Standard HRMS security. See: Updating the Security Model, page 1-16.

Once you have set up your enterprise to use security groups, Oracle HRMS automatically creates a security group when you set up a business group. The security group has the same name as the business group. For example, if you create a business group called UK Headquarters, Oracle HRMS automatically creates a security group called UK Headquarters. The Setup Business Group, however, uses the predefined security group Standard.

Note: If you change the name of your business group, the security group name is not updated. To make the maintenance of your security setup easier, Oracle recommends that you leave the names of the security groups the same as the business groups from which they are created.

Using the Assign Security Profile window you link the user, responsibility and business group to a security profile. By entering a business group you are automatically linking the responsibility to the security group.

You then log on using the responsibility and security group pairing. As security groups are automatically linked to a business group, you can then view and manage the records for that business group.

When you log on, Oracle HRMS displays all the pairings you have created between business groups and responsibilities. You could have the same responsibility listed twice with different security groups and therefore business groups. By looking at the security group you can select the correct responsibility for the business group you want to access.

To ensure the integrity of your business data, you can only view records for one business group at any time. To view records from a different business group you must switch to an alternative responsibility and business group pairing.

Important: Security groups are automatically created for you when you use Oracle HRMS. Do not use the System Administrator's Security

Groups window to add security groups as these will not be linked to your business groups.

End-Dating Unwanted Responsibilities

When you first enable security groups and run the Enable Multiple Security Groups concurrent process, the process creates two sets of records for existing user/responsibility pairs:

- For each responsibility connected to a user it creates a record linking the user, the responsibility and the Standard security group.
- For each HRMS responsibility connected to a user it creates a record linking the user, the responsibility, the security group associated with the business group, and the security profile.

If you are updating from Standard security, there may be many such records. For each existing user responsibility with a security group value of 'Standard', you need to decide whether or not the user requires access to the responsibility. Users who may need to update global lookup codes need access to the Standard security group.

In most cases, users will not require access to the Standard security group. In this case, enter an end date to remove access to the responsibility. This reduces the number of responsibilities the user sees on logging in, and prevents users from accidentally entering data into the wrong business group.

Note: By default, the Standard security group is associated with the Setup business group.

Example

If your user is set up with a responsibility called HRMS Manager you could link this to:

- UK Headquarters (business group)
- Scotland Operations (Security Profile)

Using the same responsibility (HRMS Manager), you could also link to a different business group:

- Canadian Headquarters (business group)
- Vancouver Operations (Security Profile)

Therefore, you only need to set up one responsibility (HRMS Manager) but you can enable two business groups (UK Headquarters and Canadian Headquarters).

When the business group UK Headquarters was set up, a security group UK Headquarters was automatically created. When you linked the business group to the user's responsibility, the security group UK Headquarters would also be linked.

To view the records for business group UK headquarters you would select the HRMS Manager responsibility and the UK Headquarters security group.

If you then wanted to view the records for the Canadian Headquarters business group you would switch responsibility and security group pairing, selecting the same responsibility (HRMS Manager) and the Canadian Headquarters security group.

Categorizing Information By Security Groups

Important: You can only categorize information by security groups if you are using Security Groups Enabled security.

You can categorize the following information within your enterprise using security groups:

- Lookups

Using the Application Utilities Lookups window you can set up lookups specifically for a security group. These lookups are only available to users who access the business group associated with the security group.

See: Adding Lookup Types and Values, page 3-66.

- Concurrent Programs

Using the Concurrent Parameters Program window you can enter a security group against a concurrent program, this creates a specific list of concurrent programs for a security group and therefore business group. When a user selects a concurrent program using the Submit Request window, they can select from the concurrent programs for their business group.

Note: You do not have to enter a security group against all the concurrent programs. Concurrent programs which are not linked to a security group display for all security groups/business groups.

See: Concurrent Parameters Program window, *Oracle Applications System Administrator's Guide*.

Reporting Access

Oracle HRMS enables you to set up reporting users who can query and report on the information in the database, but cannot insert, update or delete information. Reporting users can use Oracle tools, or other tools connected to the Oracle database, to report on information. Regardless of the tools used to access the database, reporting users can only read information, they cannot update information.

Using Oracle HRMS you can set up similar security restrictions to users who can update, insert or delete information. This ensures reporting users can only query and report on appropriate records.

All secure users connect to the APPS ORACLE ID. This is created when the system is installed. However, for reporting users, you should create one or more new reporting user ORACLE IDs. By associating these with a restricted security profile you can control whose records a reporting user can access.

You can make any of your restricted security profiles available not only for regular users, but also for reporting users. The security profile restricts a reporting user's access to employee records in exactly the same way as it limits regular users' access.

Reporting users can see all the details about the records they can access. To restrict the access of what a reporting user can view you must use view-based accesses. To support this need of reporting users you can use third party reporting tools to create business views.

For information about how to set up database access without on-line access, see: Setting Up Reporting Users, page 1-21.

Security Processes

There are four system security processes:

- **Enable Multiple Security Groups**
Run this process when you first set up Security Groups Enabled security.
- **Generate Secure User**
Run this process when you create a new security profile that references a reporting user.
- **Security List Maintenance**
Run this process every night.

You run these processes using an HRMS responsibility from the Submit Request window.

- **Grant Permissions to Roles**
This process is run automatically as part of the autoinstall process.

Enable Multiple Security Groups Process (HRSECGRP)

You must run the Enable Multiple Security Groups process if you set the Enable Security Groups profile option to Yes. This process must be run when:

- You set up Security Groups Enabled security for the first time to enable HRMS to use multiple security group features.
- You change from Standard HRMS security to Security Groups Enabled security. This ensures that all your existing business groups have security groups and all the multiple security group features are enabled.

Note: To avoid errors when running the Enable Multiple Security Groups process, make sure that you set the Enable Security Groups profile option to Yes at the **Application** level.

Generate Secure User Process (SECGEN)

This process grants permissions to new reporting users. It grants the "hr_reporting_user" role to the REPORTING_ORACLE_USERNAME specified in the security profile.

Run this process when you have created a new security profile that references a reporting user. In the Submit Requests window, select the name of the new security profile. This is the only parameter for the process.

Security List Maintenance Process (PERSLM)

This process maintains the lists of organizations, positions, employees, contingent workers and applicants that security profile holders can access. You should schedule it to run every night to take account of changes made during the day to security profiles, organization and position structures, and person records. If a disruption, such as a power cut, occurs while the process is running, you can manually restart it from the Submit Request window.

Note: The PERSLM process replaces the earlier LISTGEN and GLISTGEN processes.

See also Running the Security List Maintenance Process, page 1-44

Important: The Security List Maintenance process should normally run when there are no users logged on to the system. Users attached while this process is running may experience unexpected results; for example, additional employees may become visible or previously visible employees may disappear from view.

Grant Permissions To Roles Process (ROLEGEN)

All reporting users in the system share access to a set of public synonyms for tables and views. Reporting users are granted permissions to make them usable. The Grant Permissions To Roles process creates these public synonyms and grants permissions to them.

Important: The Grant Permissions to Roles process is unrelated to setting up workflow roles for Oracle products that support security by workflow.

This process runs automatically as part of the autoinstall process when you install HR, or when you upgrade the system.

The process creates public synonyms for each of the required HR objects and then grants SELECT permissions to the role 'hr_reporting_user'. Permissions are not granted on the secured tables, but only on the secure views of those tables. All permissions previously granted to the role are revoked before the new grants are made. This ensures that the correct grants exist for the valid HR objects.

Setting Up Standard HRMS Security

Use the following setup steps if your enterprise sets up a different responsibility for each business group.

To set up users for Standard HRMS security:

1. Ensure that the Enable Security Groups profile option is set to No at site and application level, using the System Profile Values window.

If this option is set to Yes then you are not using Standard HRMS security.

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

2. Define a Security Profile, page 1-37

Note: For each restricted security profile you create that references a reporting user, you must run the Generate Secure User (SECGEN) process. This is a one-off process that is not required for view-all security profiles.

3. Ensure that the required functions or menus are set up.

This is required for the responsibility. For menu functions calling configured forms or task flows, you must enter a parameter in the Parameter field of the Form Functions window.

See: Defining Menus, page 1-97

See: Set Up Menus, page 1-98

4. Ensure that the required request group is set up.

You can define the groups of standard reports and processes that a user can run from the Submit a New Request window. Every responsibility can have access to one request group.

Use the Request Groups window.

See: Request Groups window, *Oracle Applications System Administrator's Guide*
5. Define a responsibility using the Responsibility window.

See: Responsibilities Window, *Oracle Applications System Administrator's Guide*
6. Set the HR User Profile Options for the new responsibility using the System Profile Values window. You must set up the:
 - HR: User Type

Use this profile option to limit field access on windows shared between Oracle Human Resources and Oracle Payroll.
 - HR:Security Profile

Enter the security profile for the responsibility. This must be set up at responsibility level, otherwise the default view-all security profile is used. Using Standard HRMS security you can only set up one security profile for a responsibility.
 - HR:Cross Business Group Profile

This option enables you to view some information across all business groups within your enterprise.

You can set also set up other User Profile Options.

See: System Profile Values Window, *Oracle Applications System Administrator's Guide*
7. Create the username and password using the User window.

Link the user to as many responsibilities as they need using the User window.

Important: Do not use the HRMS Assign Security Profile window if you are setting up Standard HRMS security.

See: Users Window, *Oracle Applications System Administrator's Guide*
8. Run system security process using the Submit Request window:
 - Security List Maintenance

Ensure this process is run every night.

See: Running the Security List Maintenance Process, page 1-44

Setting Up Security Groups Enabled Security

Use the following setup steps if your enterprise wants to enable many business groups for one responsibility. This type of security is most commonly used by Service Centers.

Note: You only need to perform steps 1 and 2 when you first implement Oracle HRMS security. You can perform the other steps at any time.

You can update your security model from Standard HRMS Security to Security Groups Enabled security by following these steps.

Important: Once you have changed to Security Groups Enabled Security you *cannot* revert to the Standard Security model.

To set up users for Security Groups Enabled Security:

1. Set the Enable Security Groups Profile Option using the System Profile Values window.

Ensure the Enable Security Groups profile option is set to Yes at the application level for Oracle Human Resources.

Note: If this option is set to No then you are not using Security Groups Enabled security.

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

2. Run the Enable Multiple Security Group Process using the Submit Request window.

You must run the Enable Multiple Security Group process to set up Oracle HRMS to use security groups.

See: Submitting a Request, *Oracle Applications System Administrator's Guide*

Warning: The creation of security groups is more complex with Oracle HRMS 11.i.10. For this reason, the Enable Multiple Security Group process may appear slow, particularly if you have a large number of business groups.

The Enable Multiple Security Group process sets the Enable Security Groups profile option to Yes for all HRMS applications. We strongly recommend that you do not change the value of this profile option to another value.

3. Define a Security Profile, page 1-37.

Note: For each restricted security profile you create that references a reporting user, you must run the Generate Secure User (SECGEN) process. This is a one off process that is not required for view all security profiles.

4. Ensure that the functions or menus you require are set up.

This is required for the responsibility. For menu functions calling configured forms or task flows, you must enter a parameter in the Parameter field of the Form Functions window.

See: Set Up Menus, page 1-98.

See: Defining Menus, page 1-97.

5. Ensure that the request group you require is set up.

You can define the groups of standard reports and processes that a user can run from the Submit a New Request window. Every responsibility can have access to one request group.

Use the Request Group window.

See: Request Group window, *Oracle Applications System Administrator's Guide*

6. Define a responsibility using the Responsibility window.

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

7. Set the HR User Profile Options for the new responsibility using the System Profile Values window. You must set up the HR: User Type option.

You can also set the HR:Cross Business Group Profile option. This enables you to view some information across all business groups within your enterprise. See HR:Cross Business Group Profile option, page 1-46 for more information.

Note: For Security Groups Enabled security *do not* set up or amend the HR:Security Profile profile option using the System Profile Values window. To set up or change this profile option use the Assign Security Profile window.

You can also set up other User Profile Options.

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

8. Create usernames and passwords using the User window.

Important: Do not link responsibilities and security groups (business groups) to users in this window. Instead, use the Assign Security Profile window. If you do enter a responsibility and security group in this window, you still need to use the Assign Security Profile window, to link your user to a responsibility and security profile. If you do not use the Assign Security Profile window, the default view-all security profile is used and your user will be able to see all records in the business group.

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

9. End-date unwanted user responsibilities linked to Standard security group

When you first enable security groups and run the Enable Multiple Security Groups concurrent process, the process creates two sets of records for existing user/responsibility pairs:

- For each responsibility connected to a user it creates a record linking the user, the responsibility and the Standard security group.
- For each HRMS responsibility connected to a user it creates a record linking the user, the responsibility, the security group associated with the business group, and the security profile.

If you are updating from Standard security, there may be many such records. For each existing user responsibility with a security group value of 'Standard', decide whether the user requires access to the responsibility. Users who may need to update global lookup codes need access to the Standard security group.

In most cases, users will not require access to the Standard security group. In this case, enter an end date to remove access to the responsibility. This reduces the number of responsibilities the user sees on logging in, and prevents users from accidentally entering data into the wrong business group.

Note: By default, the Standard security group is associated with the Setup business group.

Use the Users window.

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

10. Assign Security Profiles, page 1-43.

Associate a security profile with a user, responsibility and business group using the Assign Security Profile window.

11. Run system security process using the Submit Request window:

- Security List Maintenance

Ensure this process is run every night.

See: Running the Security List Maintenance Process, page 1-44

Setting Up Security for Applications Using Some HRMS Windows

If you are setting up an Oracle application that uses HRMS windows (such as Organization or Position), you need to set up some features of HRMS security.

Note: If you have licensed Oracle HRMS, do not follow these setup steps. Instead, follow the steps in *Implementing Oracle HRMS*.

Using the following procedure you can either set up a responsibility that can view all records in the Business Group, or restrict access to the records for selected organizations or positions. You can also set up organization security for Financials and Manufacturing business views, page 1-19.

Organization Security for Financials and Manufacturing Business Views

You can set up security for Oracle Financials and Manufacturing applications that use organizations and organization hierarchies in their business views.

To do this, you create a single security profile that secures data either by single operating unit or by operating unit and inventory organizations, as required. You must also set the MO:Security Profile profile option at site or application level, to point to this new security profile.

To establish multi-operating unit access for some business view users, you can create for each type of user a security profile that secures organizations by organization hierarchy, using the security profile functionality. You can then set the MO:Security Profile option at responsibility level for these users.

The show_bis_record function secures data according to the definition of the security profile that is referenced by the MO:Security Profile profile option. If this profile option is not set, the HR:Security Profile profile option is used. This function is called by financials and manufacturing business views.

Single Operating Unit Security

In the Organization Security tab of the Security Profile window, select the **Secure organizations by single operating unit** option from the Security Type poplist. The operating unit is determined using the operating unit specified in the MO:Operating Unit profile option.

Single Operating Unit Plus Inventory Organizations

In the Organization Security tab of the Security Profile window, select the **Secure organizations by operating unit and inventory organizations** option from the poplist. The operating unit is determined using the operating unit specified in the MO:Operating Unit profile option. The inventory organizations you wish to include must exist within this operating unit.

Impact on Security Implementations

Financial and manufacturing business view users who have not created security profiles have unrestricted access to their data.

Financial and manufacturing business view users can secure their business view data by security profiles identified by the HR:Security Profile profile option, as long as they have not set the MO:Security Profile profile option. If this has been set, they must modify their security setup to reflect the fact that the financial and manufacturing business views secure data using the MO:Security Profile profile option.

HRMS security is not affected by these options. The HRMS business views and forms secure data according to the setting of the HR:Security Profile profile option.

To set up security

1. If you are setting up a restricted access responsibility, create a restricted security profile to define the organizations or positions the responsibility can access.

Note: Ensure your Application supports restricted access security. Not all Oracle Applications support this type of security.

If you are setting up a responsibility which can view all the records in the Business Group, you do not need to set up a security profile.

Note: A view-all security profile is automatically created when you set up a Business Group. The view-all security profile always has the same name as the Business Group.

See: Defining a Security Profile, page 1-37

2. Define a responsibility using the Responsibility window.

See: Responsibility Window, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

3. Select a security profile for the new responsibility.

In the System Profile Values window, enter a security profile at the responsibility level for the HR:Security Profile profile option.

4. Create a new user and link the user to a responsibility using the User window.

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

5. If you are setting up restricted access security, run the Security List Maintenance Process (PERSLM) from the Submit a New Request Window. If you are setting up view-all security you do not need to run the Security List Maintenance process.

This process maintains the list of organizations, positions, employees and applicants that security profile holders can access. You should schedule it to run every night to take account of changes made during the day.

See: Submitting a Request, *Oracle Applications User's Guide*

Setting Up Reporting Users

Reporting users do not have online access to the database through system forms. They use reporting tools to prepare reports on the information their security profiles grant.

All secure users connect to the APPS ORACLE ID. This is created when the system is installed. However, for reporting users, you should create one or more new reporting user ORACLE IDs and associate each with a restricted security profile. Only users that have been registered as Restricted Oracle Users are available for selection as reporting users in the Security Profile windows.

The first step in this procedure is the job of the ORACLE database administrator. The other steps are normally completed by the system administrator.

To set up a new reporting user:

1. Create a new reporting user ORACLE ID.
2. Register the new ORACLE ID with Application Object Library using the Oracle Users window, selecting Restricted in the Privilege field.
3. Define a security profile for the new ORACLE ID.
See: Defining a Security Profile, page 1-37
4. Run the HR security processes using the Generate Secure User Process.

See: Running Reports and Programs, *Oracle Applications User's Guide*

Running the HRMS Profile Options Report

The HRMS Profile Options Report lists the values of the profile options set for your HRMS installation. The report also identifies which profile options have not been set for your installation and, consequently, acts as a trouble-shooting aid.

You run the HRMS Profile Options Report using the Oracle Diagnostic Framework. This application is delivered free to customers with Oracle HRMS 11.5.4 or above. For more information, see MetaLink note 167000.1.

To run the HRMS Profile Options Report:

1. Select the application for which you want to run the report.
2. Enter your application user ID and password.
3. Select a responsibility ID.

Note: The responsibility selected usually defines which diagnostic tests you can run based on the associated application. However, the HRMS Profile Options Report does not apply this restriction, therefore, you can select the System Administrator responsibility in this field.

4. Choose Run Test.

If the report has identified missing profile option settings, the report will end with the status Failed.

5. Choose View Report.

The report lists the profile options and settings for your application. If any profile options have not been set, they are displayed in red.

Defining a Context for Mass Actions

The Contexts window determines what information the user can view, enter, and change based on the Application, Legislation, and Responsibility.

A predefined global Context contains the default attribution that appear on the forms. When you create a new Context, these attributes serve as a basis for selecting which attributes to include as display, change, and criteria attributes.

The predefined global Context does not specify values for Application, Legislation, or Responsibility. You can restrict who can process mass actions by specifying these attributes. The system always applies the most defined Context, so as soon as you define these fields, the system applies the new Context instead of the global one.

You define a new context in the Contexts window.

To define a Context:

1. Choose New from the File menu.
2. In the Context field, enter a name.
3. In the Transaction Name field, choose the Transaction Category to affect.
4. In the Application field, select an application.
5. Optionally, choose one or more of the following fields to restrict a user's ability to view and change data:
 - In the Legislation field, select a Legislation
 - In the Responsibility field, select a Responsibility
6. Choose the Find Attributes button.

The system displays the attributes from the global Context window on the Display and Change List tabbed regions.
7. Choose the Display tab and select those items to display on the Columns portion of the transaction template.
8. Choose the Change List tab and select those items to display for the Change List values.
9. Choose the Criteria tab and select the items you want to have appear on the Other Criteria list of values in Selection Criteria block on the Original tab.
10. Choose the Compile button to save your work and compile the flexfield definitions.
11. Save your work.

Security Profiles

Security Profiles

The *security profile* determines which applicant, employee, contingent worker and other person type records are available to holders of the responsibility the profile is linked to.

If you are using HRMS Standard security, you link a security profile to one responsibility using the HR:Security Profile profile option.

If you are using Security Groups Enabled security, you link a security profile to the user's responsibility and business group using the Assign Security Profile window. You can also link more than one security profile to a responsibility, as long as the user is different. This saves you setting up a new responsibility for each security profile you use.

Note: If you are using the Security Groups Enabled security model you must *not* use the HR:Security Profile profile option. This is automatically set up when you assign security profiles using the Assign Security Profile window.

See also Defining a Security Profile, page 1-37

Restricting Access to Records

You set up a security profile by identifying records of employees, applicants and contingent workers in the system which you want users to be able to access. You identify the records by selecting work structures or other criteria in the application to which employees, applicants or contingent workers are attached. For example, you could give users access only to the records of employees, applicants or contingent workers in a single organization.

You can also create restrictions on records with a person type of "Other". This includes contacts for employees or applicants, and any other people with a person type in the category of "Other". You do this using the "View Contacts" option.

You can combine different types of restriction to create a set of rules giving exactly the security access permissions you require.

When you create a business group a view-all security profile is automatically created. This has the same name as the business group. The security profile provides access to *all* employee, contingent worker, and applicant records in the business group. The system administrator links this view-all profile to users who are setting up the system. They in turn can set up security for other users.

The criteria you can use to identify records are:

- Internal organizations and organization hierarchies
- Positions and position hierarchies
- Payrolls
- Supervisors and supervisor hierarchies
- Custom restrictions
- Assignments

Tip: Oracle recommends that you use either a supervisor or position hierarchy for Self-Service Human Resources (SSHR).

For more information on hierarchies in SSHR, see: *Enter Process, Oracle HRMS Deploy Self-Service Capability Guide*.

Internal Organizations and Organization Hierarchies

Organizations include structures like departments, sections, groups and teams. You can restrict access to a single organization, a list of organizations, or an organization hierarchy. If you restrict on an organization hierarchy, you can exclude specific organizations that are in the hierarchy, or add other organizations that are not in the hierarchy.

Positions and Position Hierarchies

Positions are jobs performed within specified organizations. The position is 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. You can define security restrictions based on a position hierarchy.

Payrolls

You can restrict access to employee records by *payroll*. For example, you can give payroll staff who work on the payroll at a particular location access to records of employees on this payroll only.

Controlling security by payroll assignment limits the employee records users can see and update on employee-related windows, such as those for employee information, and element entry.

Of course, if an employee assignment does not include a payroll, payroll security cannot apply to this assignment. Payroll security also applies to applicants if they are assigned to a payroll.

Note: Payroll security is not available for contingent workers since they are not assigned to a payroll.

The windows for compensation definition are unrelated to any particular employee records or payroll assignments. Therefore limiting access by payroll does not affect users' access to these windows.

Supervisors and Supervisor Hierarchies

The supervisor for an employee, applicant or contingent worker is the person identified in the Supervisor field in HRMS applications. Supervisor profiles are dynamic, in that they do not have to specify a particular person or hierarchy level. You can therefore set up a single security profile and use it for multiple users, who will each be able to access a different set of records depending on their own location in the hierarchy.

Note: If you choose to use supervisor hierarchy, you must also set the HR: Supervisor Hierarchy Usage profile option. This profile defines how supervisor hierarchies are built. You can choose whether to create person-based or assignment-based supervisor hierarchies.

Person-based supervisor hierarchy

A person-based supervisor hierarchy is a hierarchy based on a person's supervisor and direct reports.

Assignment-based supervisor hierarchy

As an alternative to the person hierarchy, you can choose to build a hierarchy based on the supervisor assignment. In this case, you also specify the supervisor assignment number for a person and the security processes use this assignment to generate an assignment-based supervisor hierarchy. As for the other supervisor-based hierarchy, the assignment-based hierarchy is dynamic and this security profile can be used for multiple users.

Note: When you set up security based on supervisor hierarchies, the list of employees visible to a user is usually generated at the start of the session. Therefore, for profiles that only restrict access by supervisor there is usually no need to run the Security List Maintenance process. However, for supervisors with a large number of subordinates (for example, at higher management levels) this may result in a delay in generating the list. You can improve performance by limiting the number of hierarchy levels a supervisor can access or by using the Static Lists functionality to store the security permissions in a list.

For more information, see Static Lists, page 1-26.

Alternatively, for the highest levels of management, consider setting up security using organization hierarchies.

Custom Restrictions

You can set up your own restrictions using SQL statements (for example, you might want to create a restriction allowing users access only to temporary part-time employees). Your custom restriction statements are automatically validated by the system. Valid restrictions are incorporated in the security profile, further restricting the list of employees, applicants and contingent workers specified using any of the other methods mentioned above.

Since you are defining additional restrictions using SQL, you need to ensure your SQL statements are tuned for performance. Otherwise, they will have an adverse effect on the time it takes to execute the Security List Maintenance process.

Important: Custom restrictions directly restrict employees, applicants and contingent workers only; you cannot create custom restrictions on people with a system person type of Other. However, if you add custom restrictions on employees, applicants or contingent workers, related people with a system person type of Other are restricted according to the setting of the "View Contacts" option.

As for other forms of security set-up, you can choose whether to enable **user-based** custom security. This means that Oracle HRMS uses your custom rules to evaluate security permissions for a user when that user logs on to the HR application. The alternative is to use static lists to store the security information for users or to run the Security List Maintenance process to regularly update the permissions.

Assignment-Level Security

Assignment-level security enables you to restrict security access based on individual assignments. This means that the security processes evaluate permissions on an

individual assignment basis, rather than displaying all assignments if a manager has access to one assignment.

For more information, see: Assignment-Level Security, page 1-27.

User-Based Security

With user-based security, the application evaluates the security rules and permissions for the user logged on to the application. For example, if Bob Wright logs on to Self-Service Human Resources (SSHR), his access to organizations, positions, people, and assignments is based on his personal assignment details. The advantage of user-based security is that you can use one user-based security profile for multiple users. User-based security is available for security profiles based on organizations, positions, and supervisors, and can also be used in conjunction with custom security.

Note: If you use user-based security or assignment-level security, you cannot display terminated or expired assignments.

For more information on user-based security, see the individual sections in Defining a Security Profile, page 1-37.

Static Lists

Static lists enable you to choose whether to assess security permissions for a user when that user logs on (dynamically) or whether to store the permissions in static lists. The advantage of using static lists is that Oracle HRMS can quickly retrieve the permissions when the user logs on as the data is already available. A typical use of static lists may be for a senior manager who has access to many people.

When a user is in the static list, security permissions remain frozen until the next time you run the Security List Maintenance process. You can choose how often to run the Security List Maintenance process and schedule the process to run frequently if users' permissions are likely to change frequently.

The choice of whether to use static lists instead of dynamic security assessments depends on several factors, including:

- If slow system performance is unacceptable at sign-on, you can reduce the processing requirement at sign-on by using static lists. Static lists can be particularly useful in the case of a top manager who has a large number of subordinate employees or organizations, for example. In this case, the process to evaluate security permissions may be lengthy at sign-on.
- Static lists require additional maintenance to run the process. In addition, the static lists stores details of every person that the user included in the static list can access so if you include several users in a static list, you may experience an increase in data for processing.
- The other factors above become more significant as the size of an organization increases. Large numbers of users logging on to Oracle HRMS at the same time would result in a huge processing requirement at the point of sign-on. In this case, it may be advisable to add users most affected by sign-on issues to the static lists.

Global Security Profiles

If you use an application other than Oracle HRMS, for example, Oracle CRM, then you can create global security profiles that enable users to work on organizations in multiple business groups.

You do this by setting up a global hierarchy, which can contain organizations from any business group on your database, and associating it with a global security profile. This enables you to create a security hierarchy that gives users access to organizations across business groups.

If you want to read more information about organization hierarchies, see: *Organization Hierarchies, Oracle HRMS Enterprise and Workforce Management Guide*

If you use the Oracle HRMS Professional Forms Interface, then you cannot access data across business groups using one responsibility, even if you associate a global security profile to your responsibility. Your access is limited to organizations in the business group defined in the HR:Business Group profile option.

Related Topics

Security Processes, page 1-14

Running the Security List Maintenance Process, page 1-44

Assignment-Level Security

The security features in Oracle HRMS enable you to restrict security access based on individual assignments. The security processes evaluate permissions on an assignment-by-assignment basis, rather than displaying all assignments if a manager has access to any assignment.

For example, without assignment-level security, a manager with access to an employee's primary assignment would also have access to the employee's other assignments even though the supervisor for the other assignments may be a different manager. To allow supervisors to view only the relevant employees and assignments, you can enable assignment-level security in the Security Profile window. You use this functionality in conjunction with your security profile settings (for example, organization, position, supervisor security).

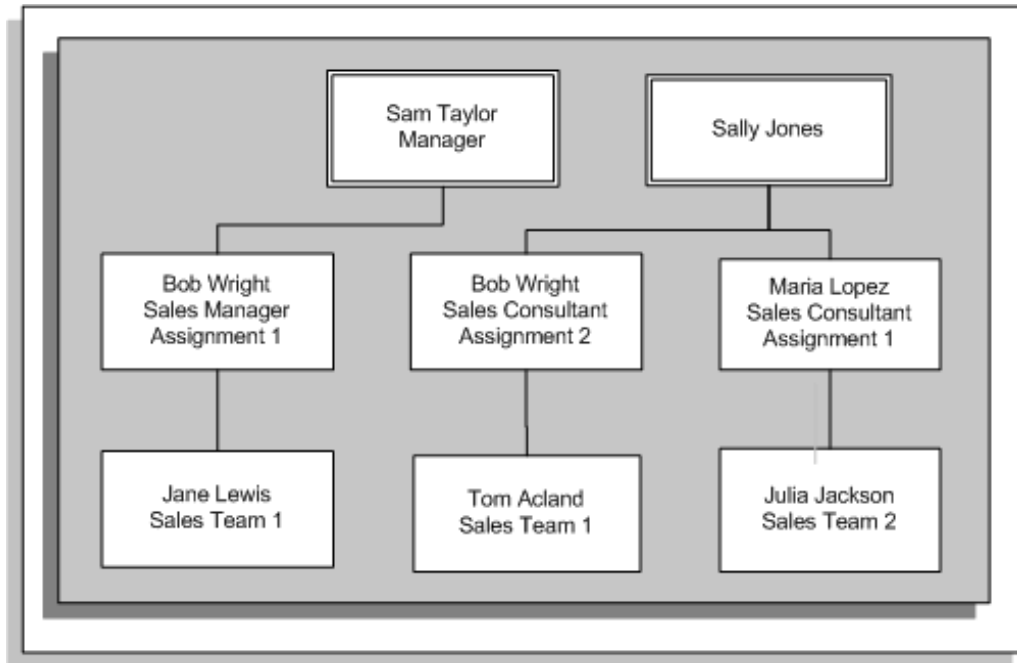
The following examples show how a manager's access to person records differs when assignment-level security is enabled and when it is disabled for a supervisor hierarchy, organization hierarchy, and position hierarchy.

Note: If you use assignment-level security, or any user-based security profile, you cannot display terminated or expired assignments. This is because the process to evaluate access to person record uses existing assignments based on the effective date.

Supervisor Hierarchies and Assignment-Level Security

The graphic below shows the direct reports for Sam Taylor and Sally Jones. The subsequent examples show how the managers' access to the direct reports varies with the different security configurations.

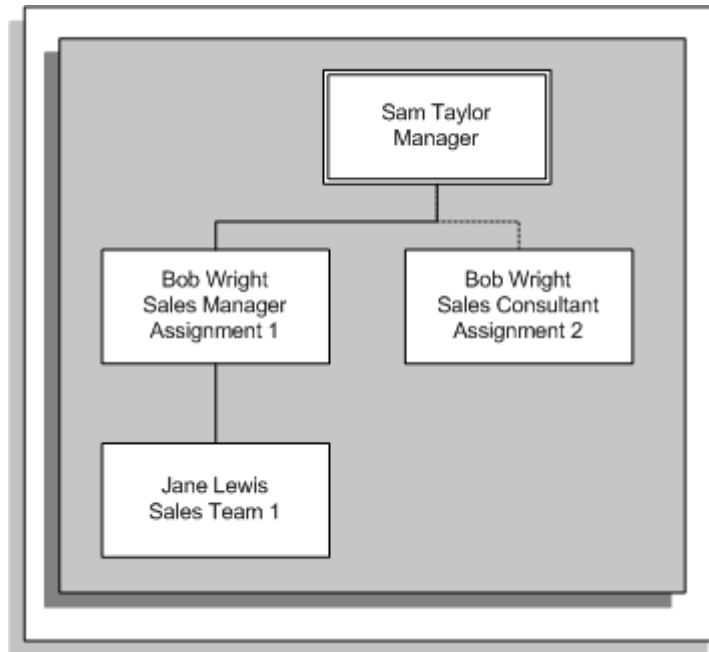
Supervisor Hierarchy



Example 1: Assignment-Based Supervisor Hierarchy (No Assignment-Level Security)

If you set up a supervisor hierarchy that is based on the supervisor assignment, Sam can see the direct report for Bob's first assignment (Jane). Because there is no assignment-level security, Sam can also see Bob's second assignment, however, Sam cannot access the direct reports for the second assignment. Sally Jones can see Bob's first assignment but cannot see the direct reports for this assignment (Jane). The following graphic illustrates the new hierarchy for Sam Taylor:

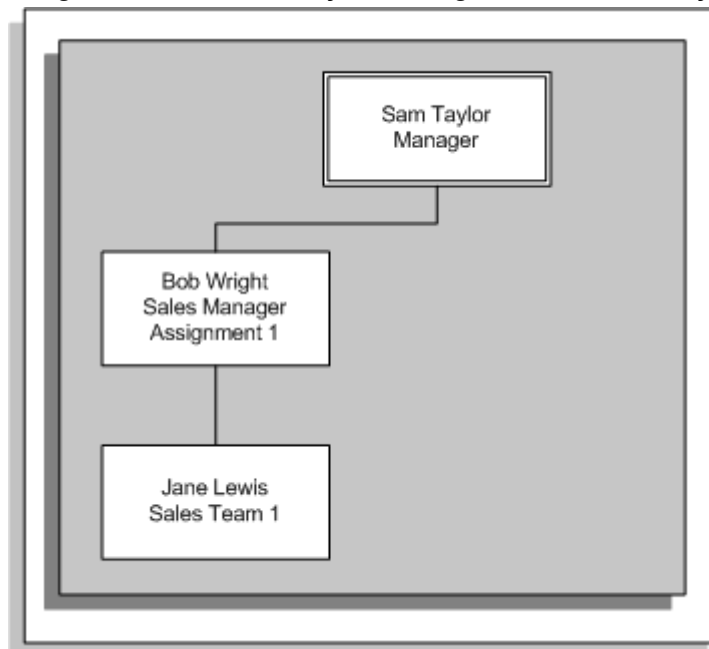
Assignment-Based Hierarchy for Sam Taylor (No Assignment-Level Security)



Example 2: Assignment-Based Supervisor Hierarchy (Assignment-Level Security)

With assignment-level security, Sam can only see Bob's first assignment and the direct reports for this assignment (Jane). Sally can see Bob's second assignment and Maria's assignment and the direct reports for these assignments. The following graphic illustrates the hierarchy with assignment-level security for Sam:

Assignment-Based Hierarchy with Assignment-Level Security

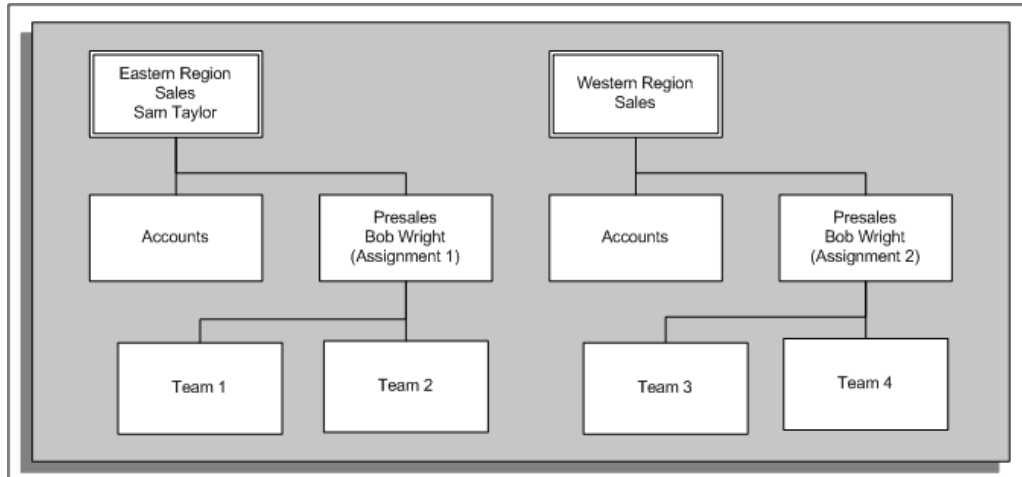


Note: If you are using an assignment-based hierarchy, it is advisable to use assignment-level security.

Organization Hierarchies and Assignment-Level Security

The graphic below shows two organization hierarchies. Within the first hierarchy (Eastern Region Sales) there is an employee with multiple assignments. The subsequent examples show how the hierarchy changes with assignment-level security disabled and enabled.

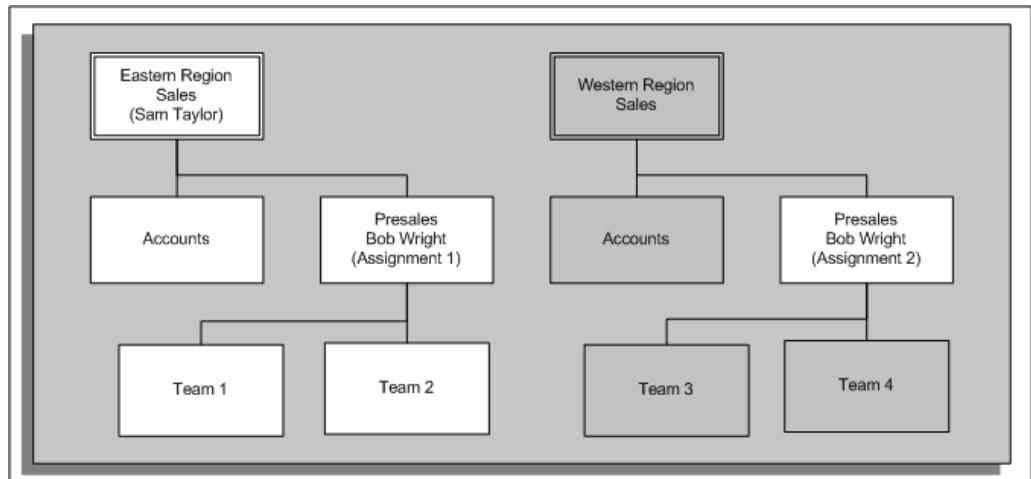
Organization Hierarchy



Organization Hierarchy (No Assignment-Level Security)

In this situation, Sam can see the people within the Accounts and Presales organizations. He can also see the people in organizations below Presales in the organization hierarchy (Team 1 and Team 2). Bob Wright has a second assignment in a different organization (Western Region Sales/Presales). Because assignment-level security is disabled, Sam can see this assignment (if a manager can access one assignment, he can access them all). Sam cannot see the organizations below the organization for Bob's second assignment. The following graphic illustrates the hierarchy without assignment-level security for Sam Taylor:

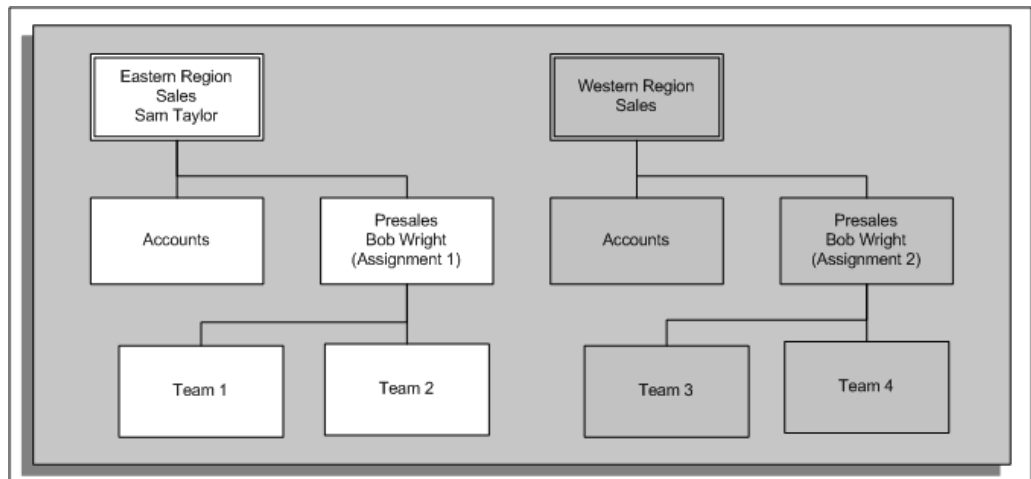
Organization Hierarchy (No Assignment-Level Security)



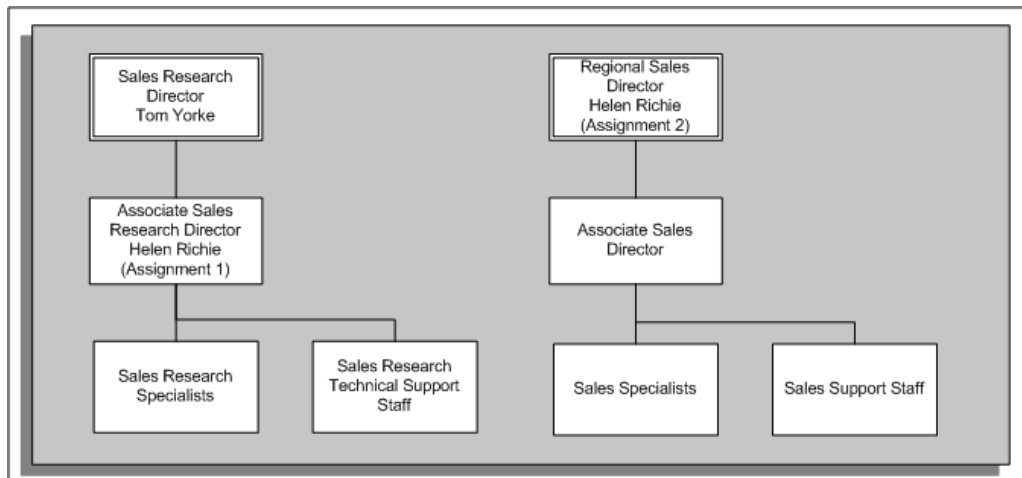
Organization Hierarchy (With Assignment-Level Security)

In this situation, Sam can see all people within the Accounts and Presales organizations. However, Sam cannot see Bob's second assignment (Western Region Sales/Presales) because the organization for the second assignment is not within the organization hierarchy to which Sam has access. The following graphic illustrates the hierarchy with assignment-level security for Sam Taylor:

Organization Hierarchy (With Assignment-Level Security)



Position Hierarchies

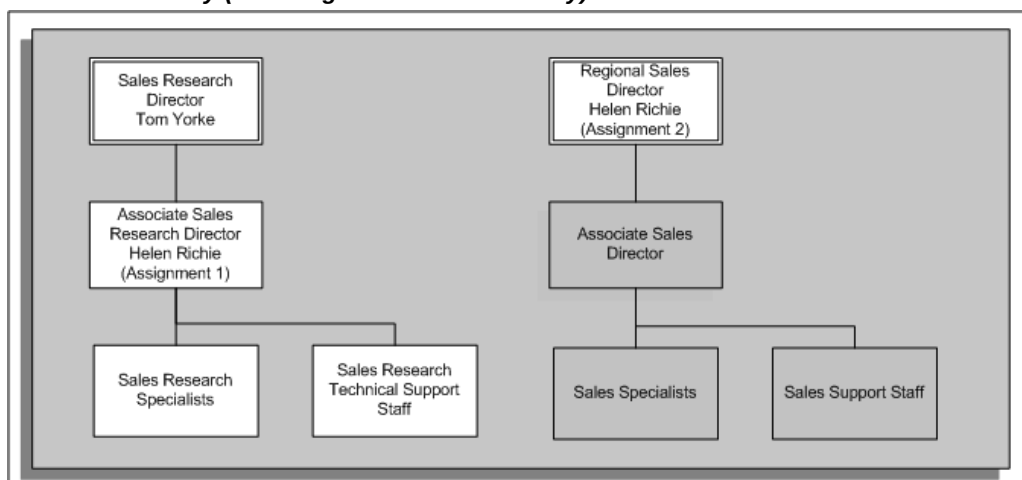


The graphic above shows two position hierarchies. Within the first hierarchy (Sales Research Director) there is an employee with multiple assignments. The following examples show how the hierarchy changes with assignment-level security disabled and enabled.

Position Hierarchy (No Assignment-Level Security)

In this situation, Tom can see the position below him in the hierarchy (Associate Sales Research Director). He can also see the reporting positions (Sales Research Specialists and Sales Research Technical Support Staff). Helen Richie has a second assignment for a different position (Regional Sales Director). Because assignment-level security is disabled, Tom can see this assignment (if a manager can access one assignment, he can access them all). Tom cannot see the positions below the position for Helen's second assignment. The following graphic illustrates the hierarchy without assignment-level security for Tom Yorke:

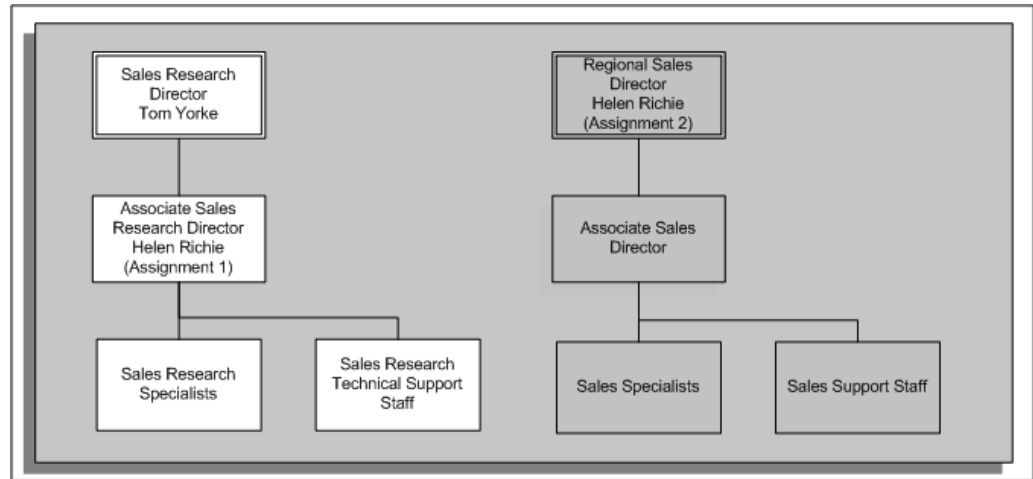
Position Hierarchy (No Assignment-Level Security)



Position Hierarchy (With Assignment-Level Security)

In this situation, Tom can see the position below him in the hierarchy (Associate Sales Research Director). However, Tom cannot see Helen's second assignment (Regional Sales Director) because the position for the second assignment is not within the position hierarchy to which Tom has access. The following graphic illustrates the hierarchy with assignment-level security for Tom Yorke:

Position Hierarchy (With Assignment-Level Security)



Implementing Assignment-Level Security

You specify whether to enable assignment-level security in the Security Profiles window. To enable assignment-level security, select the Restrict on Individual Assignments option.

For more information, see: Defining a Security Profile, page 1-37

Note: Assignment-level security is not available for all areas of Oracle HRMS. The areas currently available for assignment-level security include:

- Self-Service Human Resources (SSHR)
- People Management templates

For more information on enabling assignment-level security for People Management templates, see: Adding a People Management Template Window to a Menu or Task Flow, page 3-240

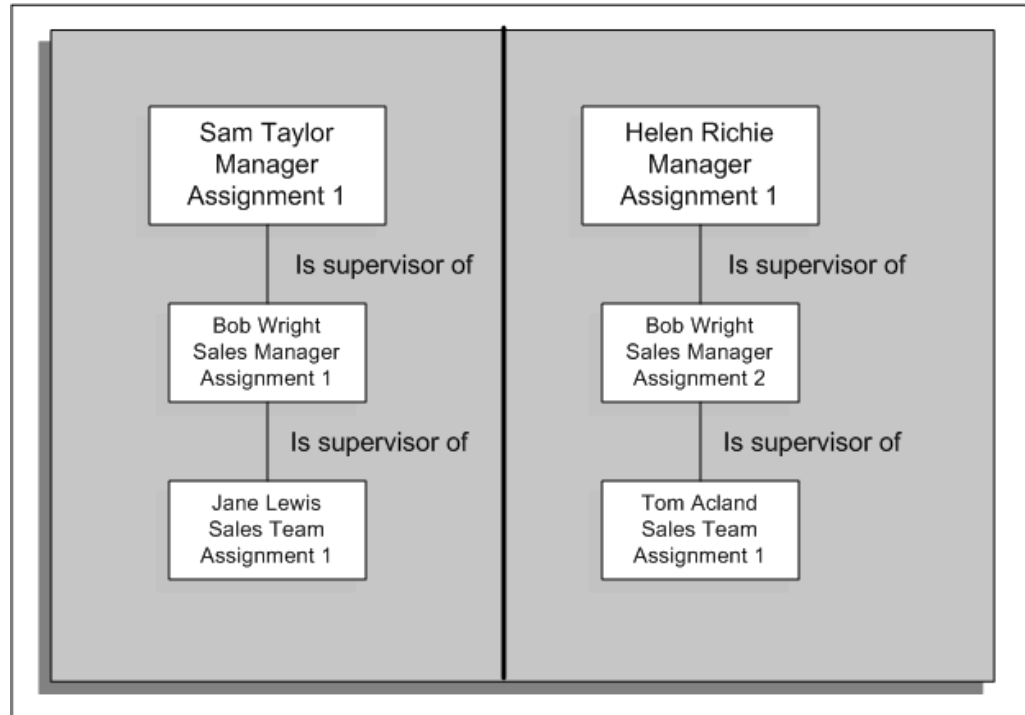
- Selected Oracle HRMS windows

Security Profiles by Supervisor Hierarchy

You can set up a security profile that permits access to a supervisor hierarchy. This means that when a manager logs on to Oracle HRMS, the application uses assignment or supervisor attributes to build a person tree with the manager at the top level. The person tree shows the direct reports for the manager and also any direct reports at lower levels of the hierarchy to which the manager has access.

The structure of the person tree depends on whether you are using an assignment-based or person-based supervisor security profile. The following examples highlight the differences between the two types of supervisor security:

Supervisor Hierarchies



Person-Based Supervisor Hierarchy

This type of security uses the Supervisor field in HRMS applications to generate a supervisor hierarchy. When a manager logs on to the HRMS application, the application assesses security permissions for the manager (user) and builds a hierarchy showing the manager's direct reports and, if applicable, additional subordinate levels of employees. In this case, a manager can see all assignments for the direct reports. In the example, Sam Taylor can see both assignments for Bob Wright (assignments 1 and 2) and both direct reports for these assignments (Jane Lewis and Tom Acland).

Assignment-Based Supervisor Hierarchy

This type of security also uses the Supervisor field in HRMS applications but when the user enters the supervisor information, he or she can also select a particular assignment for the supervisor. When the supervisor logs on to Oracle HRMS or Oracle SSHR, the supervisor hierarchy is based on the supervisor's assignment.

Note: You should only use an assignment-based supervisor hierarchy if you have enabled multiple assignments in your organization.

In the example, Sam Taylor's access to person records depends on whether assignment-level security is enabled. If it is enabled, Sam can only access the records for Bob Wright's first assignment and direct report. If assignment-level security is not

enabled, Sam can access the records for both of Bob's assignments and also for the direct report for the first assignment.

For more information, see Assignment-Level Security in Security Profiles, page 1-23.

HR: Supervisor Hierarchy Usage Profile Option

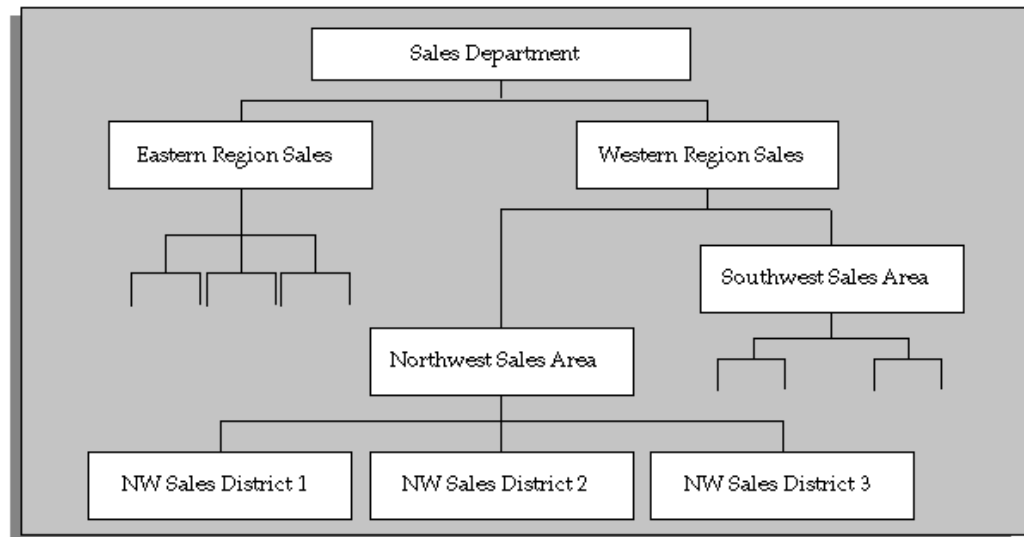
You use this profile option to specify the behavior of the supervisor hierarchy in HRMS applications by specifying whether the supervisor hierarchy is assignment or person-based.

Security Profiles by Organization and Organization Hierarchy

To set up a security profile that permits access to employee records of certain organizations only, you make use of organization hierarchies. You can build any number of additional hierarchies to meet your security requirements. There are two ways of doing this: either with or without user-based security.

For example, suppose you build this Sales Organization hierarchy:

Sales Organization Hierarchy



Without User-Based Security

You can create a security profile that permits access to employee records throughout the sales organization. This profile references the Sales Organization hierarchy. It names the Sales Department as the highest organization in the hierarchy through which profile holders have access to employee records.

Next, you want the directors of the two sales regions to have access to all employee records in their region only. You create Eastern and Western Sales Director security profiles. These profiles also reference the Sales hierarchy. But, they name the Eastern and Western Regions, respectively, as the top organizations for these profiles' access to employee records.

When you name an organization as the top organization, you specify whether it is inclusive or not. You must include the top organization if you want holders of the profile to access records of people assigned to the top organization.

With User-Based Security

If you are using user-based security, you can choose to use the organization linked to the user's assignment as the top organization. The top organization is then determined dynamically when the user logs on or when the Security List Maintenance process is run. To illustrate the advantage of using user-based security in this way, take the above example. Instead of having to create two security profiles so that the two regional sales directors can only access the records for the employees in their regions, you would only need to create one security profile which would identify the top organization based on the user's assignment. In the example, the security process would identify that the top organization for one director is Eastern Region Sales and for the other director it is Western Region Sales.

If a user has multiple assignments, the application builds a hierarchy for each assignment, using each assignment's organization as the top organization. The user can then see the people and assignments in any of their assignments' subordinate organizations.

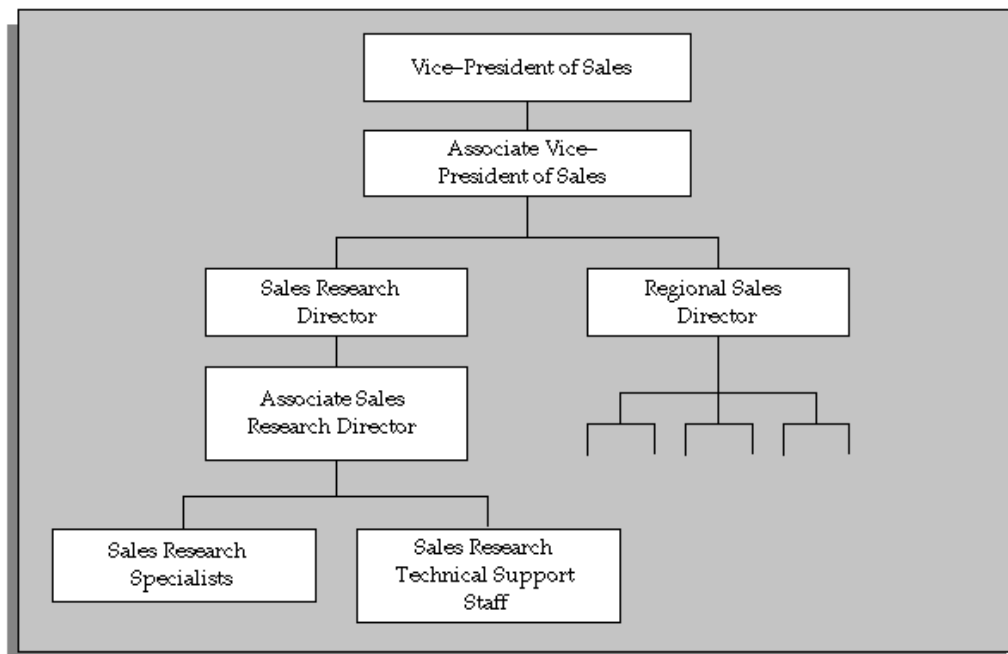
Security Profiles By Position and Position Hierarchies

After establishing limits on record access using organization hierarchies, you can further restrict access by means of position hierarchies.

Suppose, for example, within the Sales Department, you want to give the Sales Research Director access to her subordinates' records only. There are two ways of doing this: either with or without user-based security.

You can start by building the following Sales Positions Hierarchy:

Sales Positions Hierarchy



Without User-Based Security

Create the Sales Research Director security profile. This profile references the Sales Positions hierarchy and names the Sales Research Director as the top position for access to employee records.

Security Profile:	SALES RESEARCH DIRECTOR
Organization Hierarchy:	Sales Organization
Top Organization:	Sales Department
Position Hierarchy:	Sales Positions
Top Position:	Sales Research Director
Include Top Position:	Yes

When you give the Sales Research Director a responsibility including this security profile, she can access the records of her subordinates. But, she cannot access records of the:

- VP or Associate VP of Sales
- Regional Sales Director
- Regional Sales Director's subordinates

As with organization hierarchies, you can specify that profiles do not include access to the top position.

With User-Based Security

If you are using user-based security, you can choose to use the position linked to the user's assignment as the top position. The top position is then determined dynamically when the user logs on or when the Security List Maintenance process is run. To illustrate the advantage of using user-based security in this way, take the above example. Instead of having to create a separate security profile for each position hierarchy, for example, a Sales Research Director profile and an Associate Sales Research Director profile, you could create one security profile which would identify the top position based on the user's assignment. In the example, the security process would identify that the top position for the Sales Research Director is different from the top position for the Associate Sales Research Director and build the position hierarchy accordingly.

If a user has multiple assignments, the application builds a hierarchy for each assignment, using each assignment's position as the top position. The user can then see the people and assignments in any of their assignments' subordinate position hierarchies.

Defining a Security Profile

You can define security profiles in the Security Profile window (to give access to a single business group) or the Global Security Profile window (to allow users to access records from more than one business group).

See also Security Profiles, page 1-23

Note: Using the Global Security Profile window *does not* give Oracle HRMS users access to records from multiple business groups within the same responsibility; users must still switch responsibilities to see

records from different business groups. However, HRMS users can see a restricted set of information in records from more than one business group within a single responsibility if the HR:Cross Business Profile profile option is set to Yes.

If you want to associate a reporting user with the new security profile, the ORACLE database administrator must create a new reporting user ORACLE ID. The system administrator must register the new ORACLE IDs as restricted privilege users with the Application Object Library.

See *Setting up Reporting Users, Oracle HRMS Configuring, Reporting, and System Administration Guide*

To define a security profile:

1. Enter a name for the security profile.
2. If you are using the Security Profile window, select a business group. Users will have access only to records within this business group. This does not need to be the business group associated with your responsibility.

If you are using the Global Security Profile window, users will have security access to records from all business groups, subject to other restrictions you set up.

3. If you want reporting users to be able to use this security profile, select the Reporting User name for the ID set up by the database administrator (this option is not available when setting up Global Security).

Applying Restrictions by Person Type

4. You can choose to apply the security restrictions you set up to employees, applicants, contingent workers, contacts, or any combination of these. For example:
 - If you want the security restrictions to apply to employees, select Restricted from the View Employees box.
 - To ignore the security restrictions for employees and allow access to all employees, select All from the View Employees box.
 - To prevent access to any employee records, even if the other security restrictions allow access, select None from the View Employees box.

You can set the View Applicants and View Contingent Workers options independently, giving different security access to employees, applicants, and contingent workers using the same security profile.

For contacts, or other people of person type Other, you can choose one of two options:

- All: Access is unrestricted, so that all people of type Other are visible to the security profile
- Restricted: The profile restricts access to contacts to those people who are related to employees, applicants, or contingent workers who are visible within the security profile. If you can see the record of an employee, applicant, or contingent worker, you can also see the records of people of type Other specified as related to them (using the Contact Relationship field). All people of type Other who are unrelated to *any* employee, applicant, or contingent worker are also visible to the security profile.

Allowing Access to Granted User Records (SSHR only)

5. Select the Allow Granted Users option to allow a self-service user with this security profile to access the records of other self-service users, *provided that* the other users grant them access using the self-service application.

Note: This setting applies to the self-service application only and has no effect on users of Oracle HRMS.

Restricting Access by Individual Assignment

6. Select the Restrict on Individual Assignments option to build security hierarchies based on a person's individual assignments. Oracle HRMS builds the security hierarchy and assesses each individual assignment. The hierarchies generated by the security process will then only contain the particular assignments to which the manager has access. If you do not select this option, a manager who can see one assignment for a person can see all other assignments.

For more information on restricting by individual assignment, see: Assignment-Level Security, page 1-27.

Restricting Access by Organization

7. In the Organization Security tabbed region:
 - To restrict by organization list, select the Secure organizations by organization hierarchy and/or organization list option in the Security Type poplist. Select the organizations in the Organization Name field, and choose the Include option button.
 - To restrict by organization hierarchy, select the Secure organizations by organization hierarchy and/or organization list option. Select an organization hierarchy, and a top organization. Select the Include Top Organization option if you want to allow access to this organization.

If you are using user-based security, you can choose to use the organization linked to a person's assignment as the top organization by selecting the corresponding option. The security process identifies the organization linked to the user's assignment when the user logs on (or when the Security List Maintenance process is run).

If required, you can add organizations not in the hierarchy to the list, by selecting the organizations in the Organization Name field and choosing the Include option button. You can also remove specific organizations from the selected hierarchy by selecting an organization in the Organization Name field and choosing the Exclude option button.

Note: The Secure organizations by single operating unit and Secure organizations by operating unit and inventory organizations options are for use by non-HRMS users, page 1-19, and have no effect on the HRMS application.

8. By default, the Exclude Business Groups check box is unchecked, giving users access to the business groups themselves, and therefore to employees or applicants who have the business group(s) as their organization. Check the box to prevent access to the business group(s) and the employees or applicants attached to them (for

example, to prevent users from seeing new starters and other employees who have been assigned to the business group by default).

Restricting Access by Position (not Global Security)

9. In the Position Security tabbed region, deselect the View All Positions option. Select a position hierarchy, and a top position. Check the Include Top Position check box if you want to allow access to this position.

If you are using user-based security, you can choose to use the position linked to a person's assignment as the top position by selecting the corresponding option. In this case, the security process identifies the position linked to the user when the user logs on (or when the Security List Maintenance process is run).

Restricting Access by Payroll (not Global Security)

10. In the Payroll Security tabbed region:
 - To give access to all payrolls, check the View All Payrolls check box.
 - To give access to many payrolls, uncheck the View All Payrolls check box, and uncheck the Include check box. Select the payrolls you want to *exclude*.
 - To give access to a small number of payrolls, uncheck the View All Payrolls check box, and check the Include check box. Select the payrolls to include.

Restricting Access by Supervisor

11. In the Supervisor Security tabbed region, you can further specify how to create your supervisor hierarchy. You can either create a hierarchy based on a person's supervisor assignment or based on a person's supervisor.

For more information, see: Security Profiles for Supervisor Security, page 1-33.

Select either the person-based or assignment-based option and enter the number of levels of access you want to allow the supervisor to see in the Maximum Hierarchy Levels box (or leave the field blank to allow access to all levels).

Note: When you set up security based on supervisor hierarchies, you can choose to generate the list of employees visible to a user at the start of the session (user-based security). For supervisors with a large number of subordinates (for example, at higher management levels) leaving the Maximum Hierarchy Levels box blank may result in a delay in generating the list. You can improve performance by limiting the number of hierarchy levels a supervisor can access or by using the Static List functionality.

For more information, see: Static Lists, page 1-42.

Alternatively, for the highest levels of management, consider setting up security using organization hierarchies.

12. If you are using person-based supervisor security, you can choose whether to display multiple assignments in the supervisor hierarchy. By default, the Primary Assignments Only option is not selected, which gives users access to people who report to them in any assignment. If you only want to give users access to people who report to them in their primary assignment, select this option.
13. By default, the list of people whose records are accessible using supervisor-based security changes with the user name of the person who logs in (user-based

security). If you want the supervisor hierarchy to be based on a specific person (and not vary depending on the user name of the person who logs in) enter a name in the Named User field. For example, to set up supervisor-based security for reporting users who do not have any association with employees, enter the name of a person at the required supervisory level.

Restricting Access to a User's Own Records

14. To prevent users from seeing their own records, check the Exclude User check box (if you have entered a name in the Named User box, users will be prevented from seeing the records of the named user rather than their own records).

Note: This functionality is not supported in Self-Service Human Resources (SSHR).

Restricting Access by Custom Security

15. In the Custom Security tabbed region, select the custom restriction option. The options are as follows:

- No custom security
- Restrict the people visible to this profile

The Security List Maintenance process is the basis for this type of custom security. The security data is held in a static list.

- Restrict the people visible to each user using this profile

Oracle HRMS assesses the custom security when the user signs on. In addition, the custom security code can include references to user specific variables, for example, `fnd_profile.value()` and `fnd_global.employee_id`.

16. Enter a valid SQL WHERE clause fragment to select a group of records. For example, to add a restriction that assignments must be based in either London or Paris, add the following SQL fragment:

```
ASSIGNMENT.location_id in (select LOC.location_id
                           from hr_locations_all LOC
                           where LOC.location_code
                           in ('London','Paris'))
```

Alternatively, you could create custom code to use user-specific variables. The following example illustrates the use of user-specific variables:

In this example, the custom code creates a rule whereby a user can display employees or contingent workers whose last name begins with the same letter as their own. The security profile is called "Same first letter of last name".

```
substr(person.last_name,1,1) =
(select substr(i.last_name,1,1)
 from per_all_people_f i
 where i.person_id = fnd_global.employee_id
 and trunc(sysdate) between i.effective_start_date and i.effective_end_date)
```

Note: In addition, the View Employees or View Contingent Workers option is set to Restricted, and the "Restrict the people visible to each using this profile" option is set on the Custom Security tab.

If the clause is valid, it is automatically incorporated in an SQL select statement that the system generates to restrict access to records, based on the restrictions you have set up in the other tabbed regions. The list of employees, contingent workers, and applicants specified by these other restrictions is therefore further restricted by the custom restriction.

The clause fits into the system-generated statement in the following way (this statement is not visible on screen):

```
select 1
  from per_all_assignments_f ASSIGNMENT,
       per_all_people_f PERSON,
       per_person_type_usages_f PERSON_TYPE
 where ASSIGNMENT.assignment_id=:asg_id
and:effective_date between ASSIGNMENT.effective_start_date
  and ASSIGNMENT.effective_end_date
  and PERSON.person_id=ASSIGNMENT.person_id
  and :effective_date between PERSON.effective_start_date
  and PERSON.effective_end_date
  and PERSON.person_id=PERSON_TYPE.person.id
and :effective_date between PERSON_TYPE.effective_start_date
  and PERSON_TYPE.effective_end_date
  and {your custom where clause fragment goes here}
```

Important: Custom restrictions directly restrict employees, contingent workers, and applicants only; you cannot create custom restrictions on people with a system person type of Other. However, if you add custom restrictions on employees, contingent workers, or applicants, related people with a system person type of Other are restricted according to the setting of the "View Contacts" option.

17. Choose the Verify button to check that the clause you have entered is valid. If it is invalid, an error message appears explaining the reasons.

Using Static Lists

18. Static lists enable you to assess security periodically and store the data. You add users to the static list and their security permissions are evaluated when the Security List Maintenance process is run. Oracle HRMS stores the permissions for quick retrieval when the user logs on and freezes the permissions until you run the Security List Maintenance process again.

To specify which users to include in a static list, enter the user ID in the field.

19. Save your work.

What's Next

When you have modified or created new security profiles, it may be necessary to run security processes to activate your changes.

See: Security Processes, page 1-14

See: Running the Security List Maintenance Process, page 1-44

Assigning Security Profiles

Use the Assign Security Profile window to link user names, and security profiles to responsibilities. Only use this window if you are using Security Groups Enabled security (formerly called Cross Business Group Responsibility security).

Important: When using Security Groups Enabled security even if you have linked a user to a responsibility using the User window, you must still link your user to responsibility and security profile using the HRMS Assign Security Profile window. If you do not use the Assign Security Profile window, HRMS uses the default view-all security profile for the Business Group and the user will see all records for the Business Group.

The Assign Security Profile window is an essential part of setting up and maintaining HRMS security for Security Groups Enabled security. You must use this window to update your security profile assignment. Any changes entered for the security profile assignment are also shown on the User window. However, if you end date a user's responsibility using the User window, this is not shown on the Assign Security Profile window.

When you navigate to the Assign Security Profile window, the Find Security Profile Assignments window displays automatically. Select New to create a new assignment. For information about querying existing security profile assignments, see Using the Find Security Profile Assignment window, page 1-44.

To assign a new security profile:

1. Enter the user name you want to link to a responsibility.
2. Enter the application and responsibility you want to link to the user.
3. To assign a *local* security profile, select a business group to assign to the user's responsibility. The local security profile for the business group is automatically entered when you click in the Security Profile field.
4. To assign a *global* security profile, first select the security profile to assign to the user's responsibility, then select a business group.

Note: If you enter a value in the Business Group field *first*, the list of security profiles is filtered and does not display security profiles for any other business groups.

You can link more than one security profile to a responsibility as long as the user is different.

5. Enter the time period of security profile assignment.

You must enter a start date. Optionally, enter an end date if you want the security profile assignment to end on a particular date.

6. Save the security profile assignment.

To end a security profile assignment:

You cannot delete security profile assignments. If a user no longer needs an assignment you must enter an end date.

1. Query the security profile assignment you want to end.

2. Enter an end date. The user cannot use this responsibility, Business Group and security profile from this date.

Using the Find Security Profile Assignment window

This window enables you to search for security profile assignments that have already been set up. You only use security profile assignments if you are setting up Security Groups Enabled security.

If you want to set up a new security profile assignment select the New button. For more information on setting up new security profile assignments, see Assigning Security Profiles, page 1-43.

Note: When you navigate to the Assign Security Profiles window, the Find Security Profile Assignment window automatically displays.

To query a security profile assignment:

1. Enter a full or partial query on one, a selection or several of the following:

- User name
- Application
- Responsibility
- Business group
- Security profile

Note: If you enter a value in either the Business Group or the Security Profile field, any value entered in the other field is blanked out if it is not valid to select both. For example, you cannot select both business group A and a security profile which is specific to business group B.

2. Check the Retrieve Only Active Assignments check box if you want to query security profile assignments that are active as of today's date. Uncheck the Retrieve Only Active Assignments check box if you want to query security profile assignments which are no longer active or assignments which will be available in the future.
3. Choose the Find button.

The security profile assignments found by the query are displayed in the Assign Security Profile window.

Running the Security List Maintenance Process

You run the Security List Maintenance process to update the lists of organizations, positions, employees and applicants that security profiles can access. You should run this process regularly, for example nightly, to take account of changes made during the day.

See Security Processes, page 1-14

You run the Security List Maintenance process from the Submit Requests window.

To run the Security List Maintenance Process:

1. In the Name field, select Security List Maintenance.
2. In the Parameters window, enter the date for which you want to run the report in the Effective Date field. If you do not enter a date the process runs for the current system date.
3. In the Generate lists for field, select the range of security profiles for which you want to run the process. You can choose to update:
 - All Global Security Profiles (all profiles created using the Global Security Profile window)
 - All Security Profiles
 - All Security Profiles in One Named Business Group
 - One Named Security Profile
4. If you have selected All Security Profiles in One Named Business Group, select a business group.
5. If you have selected One Named Security Profile, select a security profile.
6. In the Process field, select the type of people to be processed. You can choose from the following values:
 - Current people only
 - Terminated people only
 - Current and Terminated people

Note: If you have selected One Named Security Profile, the only available option is Current and Terminated people.
7. Choose OK.
8. Complete the batch process details and choose the Submit button.

User Profiles

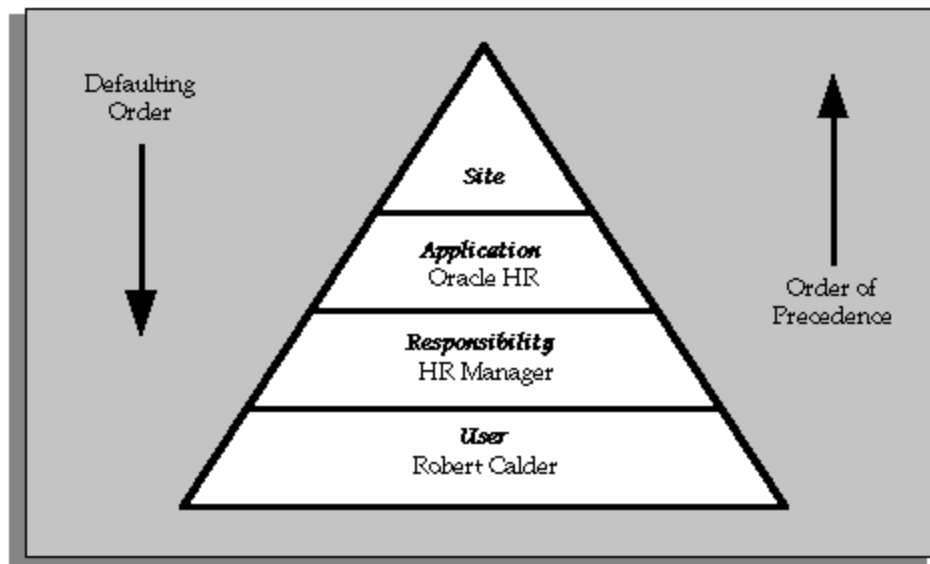
User Profiles

A user profile is a set of changeable options that affects the way your application runs. You can set user profiles at different levels. The levels below are used by the standard Security hierarchy type:

- **Site level** - These settings apply to all users at an installation site.
- **Application level** - These settings apply to all users of any responsibility associated with the application.
- **Responsibility level** - These settings apply to all users currently signed on under the responsibility.
- **User level** - These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. Values set at a lower level override any default from a higher level.

Levels For Setting User Profile Options



Tip: Set site-level options first to ensure that all options have a default. If a profile option does not have a default value, it might cause errors when you use windows, run reports, or run concurrent requests.

There are two other Hierarchy Types that are used by some profile options: Organization hierarchy type, and Server hierarchy type. These hierarchy type values also cascade as defaults from Site down to User level. They have the following levels:

- Organization hierarchy type
 - User level

- Organization level
- Site level
- Server hierarchy type
 - User level
 - Server level
 - Site level

The Organization hierarchy type enables you to set profile options for users in different operating units that are used by other applications, particularly Financials. These are not used by HRMS at all.

The Server hierarchy type should only be used by Database Administrators. It enables you to set values for a particular server on which you are running the application.

For more information on these hierarchy types see: Profiles Window, *Oracle Applications Developer's Guide*

You use the System Profile Values window to set profile options at each level for your user community. If you change a user profile option value, your change takes effect as soon as your users log on again or change responsibilities.

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

Application users can use the Personal Profile Values window to set their own profile options at the user level. Not all profile options are visible to users, and some profile options, while visible, cannot be updated by end users. Any changes users make to their personal profile options take effect immediately.

See: Defining Preferences with User Profile Options, *Oracle Applications User's Guide*

Profile Options Summary

The table below indicates whether users of the system can view or update the profile option, and at which System Administrator levels (either user, responsibility, application, or site) the profile options can be updated. These System Administrator levels are included in the table as SA User, SA Resp, SA Admin, and SA Site, respectively.

For the User column and each of the SA level columns in the table, Yes indicates that you can update the profile, V indicates that you can view the profile but you cannot update it, and No indicates that you can neither view nor update the profile.

A "Required" profile option requires you to provide a value. Otherwise the profile option already provides a default value, so you only need to change it if you do not want to accept the default.

For details of profile options applicable to all Oracle Applications, see Profile Options in Oracle Applications Object Library, *Oracle Applications Developer's Guide*

Summary of Profile Options

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
Apply Assessment Competencies to Person	Yes	No	No	No	Yes		
AME: Installed	Yes	No	No	Yes	V	No	NA
AuditTrail: Activate	No	No	No	Yes	Yes	No	No
BEN:BEN HOURLY ANNUAL IZATION FACTOR	Yes	No	Yes	Yes	Yes	No	2080
BEN: Benefits Preferred Currency	Yes	Yes	Yes	Yes	Yes	No	NA
BEN: Compensation Manager	Yes	Yes	Yes	Yes	Yes	No	NA
BEN: Comp Objects Display Name Basis	No	No	No	Yes	Yes	No	Session
BEN: Cross Business Group for Plan Design Copy	Yes	No	Yes	Yes	Yes	No	Yes
BEN: CWB Approval Mode	No	No	No	No	Yes	No	Submission at any time
BEN: CWB History Type Display	Yes	No	Yes	Yes	Yes	No	Basic Stock History

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
BEN: Designation No Change	Yes	No	Yes	Yes	Yes	No	No
BEN: Eligible Profile Rule	Yes	No	Yes	Yes	Yes	No	AND
BEN: Enable Absence Plans Functionality	Yes	No	Yes	Yes	Yes	No	No
BEN: Enable Quartile in Grade Life Event	Yes	No	Yes	Yes	Yes	No	Yes
BEN: Imputed Income Post Tax Deduction	Yes	Yes	Yes	Yes	Yes	No	No
BEN:Max Extract Line Size	Yes	Yes	Yes	Yes	Yes	No	10000
BEN:VA PRO Rule	Yes	No	Yes	Yes	Yes	No	AND
DateTrack: Date Security	V	Yes	Yes	Yes	Yes	No	NA
DateTrack: Delete Mode	-	-	-	-	-	Not in use	
DateTrack: Enabled	V	No	No	Yes	No	NA	NA
DateTrack: Login Date (YYYY/MM/DD)	V	Yes	Yes	Yes	Yes	NA	NA
DateTrack: Override Mode	-	-	-	-	-	Not in use	

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
DateTrack: Reminder	Yes	Yes	Yes	Yes	Yes	No	No
DateTrack: Update Mode	-	-	-	-	-	Not in use	
Disable Self-Service Personal	Yes	Yes	Yes	Yes	Yes	No	No
Display Messages	Yes	Yes	Yes	Yes	Yes		
Enable Security Groups	No	No	No	Yes	Yes	Yes	Security groups are not enabled
Flexfields: Open Descr Window	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Flexfields: Open Key Window	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Help Localization Code	Yes	Yes	Yes	No	No	Yes, by HRMS	The Responsibility is associated with the Global set of help files rather than a localized or verticalized set.
HR: Absence Duration Auto Overwrite	No	No	Yes	No	Yes	No	No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Absence Start Date	No	Yes	Yes	Yes	Yes	No	The start date of the Absence being recorded on the Absence form
HR: Absence View Layout	Yes	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: Action Parameter Group Name	Yes	Yes	Yes	Yes	Yes		
HR: Actions - Display Others	Yes	Yes	Yes	Yes	Yes	No	Defaults to No
HR: Actions - Validation	Yes	Yes	Yes	Yes	Yes	No	Validate all Functions
HR: Allow Approver Updates to Self Service Actions	No	No	No	No	Yes	No	No
HR: Allow Concurrent Self Service Actions	No	No	No	No	Yes	No	No
HR: Allow Online W-2 Viewing as of (MM/DD)	Yes	Yes	Yes	Yes	Yes		

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Allow Processing of Ineligible Self Service Actions	No	No	No	No	Yes	No	No
HR: Allow Use of Eligibility for Self Service Actions	No	No	No	No	Yes	No	No
HR: Applications View Layout	V	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: Appraisal Template Lov	Yes	Yes	Yes	Yes	Yes	No	No
HR: Appraisee Can Add Participants	No	Yes	Yes	Yes	Yes	No	Yes
HR: Assignment ID	-	-	-	-	-	Internal use only.	
HR: Authoria Integration Enabled	Yes	Yes	Yes	Yes	Yes	Yes (if linking to Authoria HR)	No
HR: Authoria UK URL	No	No	No	No	Yes	Yes (if linking to Authoria HR)	
HR: Authoria US URL	No	No	No	No	Yes	Yes (if linking to Authoria HR)	
HR: Auto Apply Collective Agreement Entitlements	Yes	No	Yes	Yes	Yes	Yes	No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Auto Evaluate Collective Agreement Entitlements	No	No	Yes	Yes	Yes	Yes	No
HR: Automatically synchronize single GL company cost centers with HR	Yes	No	No	No	Yes	Yes	No
HR: Base Salary Required	No	No	No	No	Yes	No	Null
HR: B IS Job Hierarchy - Job Grouping Level 1	No	No	No	No	Yes	No	Null
HR: B IS Job Hierarchy - Job Grouping Level 2	No	No	No	No	Yes	No	Null
HR: BIS Reporting Hierarchy	-	-	-	-	-	Obsolete.	
HR:Blank Effective Date	Yes	Yes	Yes	Yes	Yes	No	No
HR: Business Group	V	No	Yes	No	Yes	Yes	Default Setup Business Group at Site level.
HR: Cancel Application	V	No	Yes	Yes	Yes	No	Default is Null. This is interpreted by the system as No.

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Check Entitlement Cache	No	No	Yes	Yes	Yes	Yes	Yes
HR: Collective Agreement Logging	Yes	Yes	Yes	Yes	Yes	Yes	Low
HR: Contingent Worker Manager Actions Menu	Yes	Yes	Yes	Yes	Yes	Yes	Contingent Worker Manager Actions Menu
HR: Contingent Worker Personal Actions Menu	Yes	Yes	Yes	Yes	Yes	Yes	Contingent Worker Personal Actions Menu
HR: Copy period details for budget	Yes	Yes	Yes	Yes	Yes	No	Default is No.
HR:Cross Business Group	V	No	No	No	Yes	NA	Default is No.
HR: CWK in Head Count Reports	Yes	Yes	Yes	Yes	Yes		
HR: Data Exchange Directory	V	No	Yes	Yes	Yes	No	
HR: Data Migrator Business Group Lockout	No	No	No	No	Yes	NA	NA
HR:Data Pump Action Parameter Group	Yes	Yes	Yes	Yes	Yes	No	Null
HR: Date From	-	-	-	-	-	Internal use only.	

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Default Assignment Costing	Yes	Yes	Yes	Yes	Yes	No	.
HR: Default Check/ Cheque Number Method	Yes	Yes	Yes	Yes	Yes	No	Null
HR: Default Correspondence Language	Yes	Yes	Yes	Yes	Yes	No	No default.
HR: Default Full Name Format	V	Yes	Yes	Yes	Yes	No	Surname Prefix Initials Prefix (Partner) Surname (Partner)
HR: Default Nationality	Yes	Yes	Yes	Yes	Yes	No	NA
HR: Defer Update After Approval	No	Yes	Yes	Yes	Yes	Yes	Yes
HR: Disable Ethnicity Tab	V	Yes	Yes	Yes	Yes	No	Enabled
HR: Disallow Template Reference	Yes	Yes	Yes	Yes	Yes		
HR: Display All Candidate Offers	-	-	-	-	-	Obsolete.	
HR: Display Competencies	Yes	No	Yes	Yes	Yes		

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Display Brief Person Name	No	No	No	No	Yes	No	No
HR: Display Person Name	Yes	Yes	Yes	Yes	Yes	No	Brief Name
HR: Display Person Search	No	Yes	Yes	Yes	Yes	No	Yes
HR: Display Position Hierarchy	No	No	No	No	Yes	No	No
HR: Employee Directory Global Menu	No	No	No	No	Yes	No	Employee Directory Global Menu
HR: Employment View Layout	Yes	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: Enable Bank Branch Validation	Yes	Yes	Yes	Yes	Yes	No	Null
HR: Enable DTW4 defaulting	V	No	No	No	Yes	No	Yes
HR: Enable Multiple Assignments in SSHR	Yes	Yes	Yes	Yes	Yes	No	No
HR: Enable Web ADI Integration	Yes	No	No	No	Yes	No	No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Enforce Costing Mandatory Segment Check at Data Entry	Yes	Yes	Yes	Yes	Yes		Default is Null. This is interpreted by the application as No.
HR: Execute Legislative Check Formula within Run	Yes	Yes	Yes	Yes	Yes	No	NA
HR: Expand Role of Contingent Worker	Yes	No	No	No	Yes	Yes	Default is Null. This is interpreted by the application as No.
HR: Extension Agent	No	Yes	No	No	Yes	No	
HR: Extension Agent Client Timeout	Yes	No	No	No	No	No	NA
HR: Extension Agent Enabled	No	Yes	No	No	Yes	Yes (if using Info online)	No
HR: FastFormula Debug Level	Yes	Yes	Yes	Yes	Yes	NA	NA
HR: Free text school name allowed in Self Service	Yes	Yes	Yes	Yes	Yes	No	Null

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: French HRMS check mandatory payroll assignment attributes exist	Yes	Yes	Yes	Yes	Yes		Yes
HR: GL Cost Center Org Classifications	V	No	No	No	Yes	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	None
HR: GL Cost Center Synchronization Options	V	No	No	No	Yes	No - This profile option is obsolete.	NA
HR: GL Organization Name Format	V	No	No	No	Yes	Yes (if you want to use Auto Orgs to synchronize GL cost centers with HR)	NA
HR: Global Competence Flex Structure	V	No	No	No	Yes	Yes (if you want to create global competencies)	NA
HR: Grade Key Flex-Identify 1st Segment	Yes	No	Yes	Yes	Yes	No	NA
HR: Grade Key Flex-Identify 2nd Segment	Yes	No	Yes	Yes	Yes	No	NA

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR:HR/ Payroll Representative Source	V	No	No	No	Yes	No	No default
HR:Hide Work Phone on Person	-	-	-	-	-	Obsolete.	
HR: IE P35 Reporting Year	Yes	No	No	No	Yes	Yes	NA
HR: Info Online: Open in New Window	No	No	No	No	No	No	
HR: Info Online: RIA Password	Yes	Yes	Yes	Yes	Yes		
HR: Info Online: RIA Username	Yes	Yes	Yes	Yes	Yes		
HR: Info Online Toolbar Icon	NA	NA	NA	NA	NA	No	
HR: Info Online: Use Field Context	Yes	Yes	Yes	Yes	Yes		
HR: Informal Name Format	No	No	No	No	Yes	No	NA
HR:Job Key Flex- Identify 1st Segment	Yes	No	Yes	Yes	Yes	No	NA
HR:Job Key Flex- Identify 2nd Segment	Yes	No	Yes	Yes	Yes	No	NA

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Job Level	No	No	Yes	Yes	Yes	No	NA
HR: Localization in SSHR	-	-	-	-	-	Obsolete.	
HR: Location ID	-	-	-	-	-	Internal use only.	
HR: Local Nationality	-	-	-	-	-	-	No default value exists, and the system administrator can set the value at any level.
HR: Manage Self Service Actions When Future-Dated Changes Exist	No	No	No	No	Yes	No	Stop with an Error
HR: Manager Actions Menu	Yes	Yes	Yes	Yes	Yes	Yes	Manager Actions Menu
HR: Mask Characters	No	Yes	Yes	Yes	Yes		
HR: Metalink Integration Application	Yes	Yes	Yes	Yes	Yes	No	Human Resource Management Systems
HR: Metalink Integration Enabled	Yes	Yes	Yes	Yes	Yes	No	Yes
HR: Monitor Balance Retrieval	Yes	Yes	Yes	Yes	Yes	No	

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR:NI Unique Error or Warning	No	No	Yes	No	Yes	No	NA
HR: National Identifier Validation	No	Yes	Yes	Yes	Yes	No	Error on Fail
HR:Non-Updateable Element Set	Yes	Yes	Yes	Yes	Yes	No	NA
HR:OAB New Benefits Model	Yes	Yes	Yes	Yes	Yes	No	NA
HR: Offers - Hiring Manager Initiation	-	-	-	-	-	Obsolete.	
HR: Online Tax Forms Update Method	V	Yes	Yes	No	Yes	No	All
HR: Organization ID	-	-	-	-	-	Internal use only.	
HR: Override Grade Defaults	Yes	Yes	Yes	Yes	Yes	No	Defaults to Yes
HR: Payroll Payments Self-Service Enable Multiple Assignments	Yes	Yes	Yes	Yes	Yes	No	No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Payroll Payments Self-Service Payments List Mode	Yes	Yes	Yes	Yes	Yes	No	Null
HR: Performance View Layout	Yes	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: Person ID	-	-	-	-	-	Internal use only.	
HR: Personal Actions Menu	Yes	Yes	Yes	Yes	Yes	Yes	Personal Actions Menu
HR: Personal Info Check Pending	-	-	-	-	-	Obsolete.	
HR: Position Key Flex-Identify 1st Segment	Yes	No	Yes	Yes	Yes	No	NA
HR: Position Key Flex-Identify 2nd Segment	Yes	No	Yes	Yes	Yes	No	NA
HR: Propagate Data Changes	Yes	No	No	No	Yes	No	Default is Null. This is interpreted by the application as No.
HR:Purge Element Entry Permission	V	Yes	Yes	Yes	Yes	NA	NA

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR: Query Only Mode	V	Yes	Yes	Yes	Yes	No	NA
HR: Refresh Self Service Actions with Data from Intervening Actions	No	No	No	No	Yes	No	No
HR: Restrict Letter by Vacancy or Event	V	No	Yes	Yes	Yes	No	Default is Null
HR: Restrict Transactions across Legislations for SSHR	No	No	Yes	No	Yes	No	No
HR: RIA Integration Enabled	Yes	Yes	Yes	Yes	Yes	No	Yes
HR:Run BENMNGLE When Processing a Self Service Action	No	No	No	No	Yes	No	No
HR: Salary View Layout	Yes	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: Security Profile	No	No	Yes	No	Yes	Yes	Default view-all security profile at Site level
HR: Self Service HR Licensed	No	No	No	No	Yes	No	Defaults to No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR:Self Service Hire and Placement Default Values	No	Yes	Yes	Yes	Yes		Yes
HR:Self-Service Save for Later	No	No	No	No	Yes	No	Yes
HR: Subrogation	Yes	Yes	Yes	Yes	Yes	No	No
HR: Supervisor Hierarchy Usage	Yes	No	No	No	Yes	No	
HR:TCA Unmerge Options	No	No	No	No	Yes	No	In Patch Process
HR: Training View Layout	Yes	Yes	Yes	Yes	Yes	No	FORM or TABLE
HR: US Address line length	No	Yes	Yes	Yes	Yes	No	22
HR: Use Fast Formula Based PTO Accruals	No	No	No	No	Yes	Yes	No
HR:Use Global Applicant Numbering	V	No	No	No	Yes	Yes	No
HR:Use Global Contingent Worker Numbering	V	No	No	No	Yes	Yes	No
HR:Use Global Employee Numbering	V	No	No	No	Yes	Yes	No

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HR:Use Grade Defaults	V	Yes	Yes	Yes	Yes		Defaults to Yes
HR:Use Standard Attachments	No	Yes	Yes	Yes	Yes	Yes	Yes at Site Level, No at Seeded Responsibility Level
HR:User Type	V	No	Yes	Yes	No	Yes	NA
HR: Use Title in Person's full name	No	No	No	No	Yes	NA	Yes
HR: View Payslip From Date for WEB (MM/DD/YYYY)	Yes	Yes	Yes	Yes	Yes	Yes	01/01/1997
HR:View Unpublished Employee 360 Self Appraisal	Yes	No	Yes	Yes	Yes	No	Default value is Null
HR: Views Layer Size	Yes	Yes	Yes	Yes	Yes	Yes	300 pixels
HR: Webapps Tips Test Mode	Yes	Yes	No	No	No	No	No
HR: Web Proxy Host	No	No	No	No	No		
HR: Web Proxy Port	No	No	No	No	No		
HR: Worker Appraisals Menu	No	Yes	Yes	Yes	Yes	Yes	Employee Appraisals Menu

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
HRI: Enable Captured Events Archive	No	No	No	No	Yes	Yes	No
HRI:DBI Force Foundation HR Processes	No	No	No	No	Yes	Yes	No
HRI: Populate Assignment Events Queue	No	No	No	No	Yes	Yes	Yes
HRI: Populate Supervisor Hierarchy Events Queue	No	No	No	No	Yes	Yes	Yes
HRI: Populate Supervisor Status History Events Queue	No	No	No	No	Yes	Yes	Yes
HRMS: Workforce Turnover Calculation Method	No	No	No	No	Yes	No	Null
Limit By Persons Organization	Yes	Yes	Yes	Yes	Yes	No	No
OAB:Self Registered User Responsibility	Yes	Yes	Yes	Yes	Yes	No	Self Registered Employee Default responsibility
OAB: User to Organization Link	Yes	Yes	Yes	Yes	Yes	No	Null

Profile Option	User	SA User	SA Resp	SA App	SA Site	Required	Default Value
OAB: User to Payroll Link	Yes	Yes	Yes	Yes	Yes	No	Null
PAY: Display Reset Years in Payroll	Yes	Yes	Yes	Yes	Yes	No	No
PAY: Generate Periods for Tax Year	Yes	Yes	Yes	Yes	Yes		
PER: Automatic Save	Yes	No	No	No	Yes		
PER: Navigation	Yes	No	No	No	Yes		
Personalize Self-Service Defn	Yes	Yes	Yes	Yes	Yes	No	No
PO: Services Procurement Enabled	V	No	No	No	Yes	No	No
Talent Management Source Type	Yes	No	No	No	Yes	Yes	NA
Workforce Measurement Type	No	No	No	No	Yes	Yes	

Profile Options

AME:Installed

Indicates whether Oracle Approvals Management is installed.

AuditTrail:Activate

When you enter or update data in your forms, you change the database tables underlying the forms you see and use.

AuditTrail tracks which rows in a database table were updated at what time and which user was logged in using the form(s).

You can turn AuditTrail on or off (Yes or No). The default setting is No. You must set this option to Yes before you can audit any Oracle Applications table.

BEN:BEN HOURLY ANNUALIZATION FACTOR

If you want to use the Hourly activity reference period for Compensation Workbench plans, enter a value for this user profile option to determine how to convert an hourly rate to an annual rate, and vice versa. The default is 2080 hours (8 hours * 5 days * 52 weeks).

BEN:Benefits Preferred Currency

Set this profile option for Self-Service Compensation Workbench to control the preferred currency in which a manager views and enters budget and worksheet distributions. Actual amounts are paid in the currency of the Compensation Workbench plan, not the preferred currency.

BEN:Compensation Manager

Set this profile option to Yes to give access to features in the Compensation Workbench that are available only to Compensation Managers.

BEN:Comp Objects Display Name Basis

Use this profile option to determine whether compensation object names display in various application windows (both in the professional and Self-Service user interfaces) based on the user's session date or the life event occurred on date.

BEN: Cross Business Group for Plan Design Copy

Set this profile option to 'N' to restrict a user from copying plan design data between business groups through the Plan Design Copy function. The profile option defaults to 'Y.' If you set the value to 'N,' the user will only be able to export a plan design or copy the plan design within the business group attached to their responsibility.

Ben: CWB Approval Mode

Use this profile option to determine CWB Approval behavior. If you set the value to 'Y,' then CWB Approval Mode allows you to enforce the submission and approval of all lower-level manager worksheets before higher-level managers may submit their worksheets for approval. The default approval mode allows the submission of a worksheet by a higher-level manager at any time regardless of the status of the lower-level manager worksheets.

BEN: CWB History Type Display

Set this profile option to Extended Stock Option History for use with the Employee Stock Options Total Position Report. If you load stock history from a third party administrator into Oracle HRMS, you can use the Grant Detail Report Style of the Total Position Report to view details about grants held by individual employees.

BEN: Designation No Change

This profile option determines the contents of the Dependent Eligibility Audit log. When set to No (the default value) the audit log returns information only for dependents

with eligibility changes. When set to Yes, the audit log returns all dependents, even if they have no eligibility change.

BEN:Eligible Profile Rule

This profile option enables you to configure how FastFormula rules are evaluated in an eligibility profile. It is set to AND by default, meaning that a participant must satisfy all the rules you attach to an eligibility profile. If you set the user profile option to OR, the participant need only satisfy one of the rules.

BEN:Enable Absence Plans Functionality

Set this profile option to Yes for the users or responsibilities who will enter absences for absence benefit plans, if you want them to run the Participation Process to process the absence life events. This displays the Enroll Absences button on the Absence Detail window.

BEN:Enable Quartile in Grade Life Event

Use this profile option to determine whether the system triggers the Quartile in Grade Life Event when a change in a person's grade, salary basis, or salary moves them into a new quartile in grade. These conditions trigger the Quartile in Grade life event if the BEN:Enable Quartile in Grade Life Event user profile option is set to Yes. If you set this profile option to No, the system never creates a Quartile in Grade potential life event.

BEN:Imputed Income Post Tax Deduction

Set this profile option to Y to deduct any after tax employee contributions from the imputed income total for a benefits plan subject to imputed income. If you leave this profile set to N (the default) the application assumes that the employer pays 100% of the given benefit.

BEN:Max Extract Line Size

Use this profile option to set the maximum length of a record generated by the Extract Write Process for compensation and benefits system extracts.

BEN:VAPRO Rule

This profile option enables you to configure how FastFormula rules are evaluated in a variable rate profile. It is set to AND by default, meaning that a participant must satisfy all the rules you attach to a variable rate profile. If you set the user profile option to OR, the participant need only satisfy one of the rules.

DateTrack:Date Security

Controls the way users can change their effective date:

- **All** (users can change to any date)
- **Past** (users can change to dates in the past only)
- **Present** (users cannot change their effective date)
- **Future** (users can change to dates in the future only)

The meaning of Past and Future here is with respect to the user's login date, which is usually today's date, but may be set to another value by the DateTrack:Login Date profile option.

DateTrack:Enabled

Set to Yes at Application level for Oracle HRMS.

DateTrack:Login Date (YYYY/MM/DD)

Normally a user logs onto the system with an effective date of today's date. Use this profile option to change a user's default date to another date. This profile option works in conjunction with DateTrack:Date Security. For example, if a user has DateTrack:Date Security set to Future and DateTrack:Login Date set to 1900/01/01, they can change their effective date to any date after January 1 1900, but not before.

DateTrack:Reminder

Determines whether the Decision window appears when you open a window in which you can enter, update, or delete datetracked information. Notice that the Decision window never appears on windows where you can query datetracked information but not update it. There are three possible values:

- **Always** (the window always appears)
- **Never** (the window never appears)
- **Not Today** (the window appears only if the effective date is not the system date)

Disable Self-Service Personalizations

If this profile option is set to Yes, any personalizations created for self-service functions using the Personalization Framework will not be applied. Only the original definition of each self-service page will be displayed.

This profile option is used in SSHR.

Enable Security Groups

Controls whether you use multiple security groups. There are three possible values:

- **No** - If using standard security
- **Y** - If using multiple security groups
- **Hosted** - Reserved for use by VPD Hosting implementations

Change the default to Yes at application level *only* if your enterprise is implementing a Security Groups Enabled system (multiple security groups). If you change the default to Yes, you must run the Enable Multiple Security Groups process. See Security Models, page 1-5.

Important: Once you have changed to Security Groups Enabled Security you *cannot* revert to the Standard Security model.

Note: Non HRMS applications do not support multiple security groups in Release 11i.

Flexfields:Open Descr Window

This profile option determines whether a descriptive flexfield window automatically opens when you navigate to the field.

Set to Yes if you want the flexfield to pop open automatically. If this option is set to No, you can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L.

The default is Yes.

Flexfields:Open Key Window

This profile option determines whether a key flexfield window automatically opens when you navigate to the field.

Set to Yes if you want the flexfield to pop open automatically. If the option is set to No, you can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L.

The default is Yes.

Help Localization Code

Controls which set of help files are linked to each responsibility. If you accept the default, then the set of help files for Global HRMS will be associated with the responsibility. However, if you want to specify a legislative or vertical variant of HRMS you must set the Help Localization Code as follows:

- AU for Australia HRMS Help
- BE for Belgian HR Help
- CA for Canadian HRMS Help
- CN for Chinese HRMS Help
- DE for German HRMS Help
- ES for Spanish HRMS Help
- FD for US Federal HR Help
- FR for French HR Help
- GCC for SAreion HR Help
- HK for Hong Kong HR Help
- HU for Hungarian HRMS Help
- IE for Irish HRMS Help
- IN for Indian HRMS Help
- IT for Italian HR Help
- JP for Japanese HRMS Help
- KR for Korean HRMS Help
- KW for Kuwaiti HRMS Help
- MX for Mexican HRMS Help
- NL for Netherlands HR Help
- NZ for New Zealand HRMS Help
- SG for Singapore HRMS Help

- UK for UK HRMS Help
- US for US HRMS Help
- ZA for South African HR Help

These entries must be in upper case.

HR: Absence Duration Auto Overwrite

Controls whether the absence duration formula automatically recalculates the duration of an absence when the date or time of the absence is changed. Set to Yes if you have created an absence duration formula (or one is supplied by your localization team) and you want absence durations to be recalculated automatically.

HR: Absence View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This User Profile Option is used in SSHR.

HR: Actions - Display Others

Controls whether the Other Available Actions region is displayed on the Actions page when the user has preselected a different action.

This User Profile Option is used in SSHR.

HR: Actions - Validation

Controls the point at which the application runs validation checks for Pending Workflow transactions within SSHR. The validation can be carried out using one of the following options:

- All actions are validated
- Only the preselected action is validated. The other actions are validated after selection.
- All actions are validated after selection

This User Profile Option is used in SSHR.

HR:Allow Approver Updates to Self Service Actions

This profile option will allow an approver to make updates to actions in Self Service.

HR:Allow Concurrent Self Service Actions

Set this profile option to Yes to allow multiple simultaneous self-service actions.

HR:Allow Processing of Ineligible Self Service Actions

If this is set to Yes managers will be able to process ineligible self service actions. They may wish to do this if the action will become eligible by its effective date.

Note: This option depends on also enabling the profile option HR:Allow Use of Eligibility for Self Service Actions in order to display ineligible actions in the first instance.

HR:Allow Use of Eligibility for Self Service Actions

If this profile option is set to yes, the Eligibility column will be displayed on the Actions page and all eligible and ineligible actions are displayed. The Eligibility column will distinguish between them.

If it is set to No, the default, only eligible actions are displayed and the Eligibility column will not be displayed.

Note: Managers will not be able to process ineligible actions unless the profile option HR:Allow Processing of Ineligible Self Service Actions is also set to Yes.

HR:Applications View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This User Profile Option is used in SSHR.

HR: Appraisal Template LOV

This profile option is used in Appraisal V3.4 where you can configure the Appraisal Template field to be an LOV or a poplist. Valid values are Yes, which will display the field as an LOV, and No, the default, which will display the field as a poplist.

HR: Appraiser Can Add Participants

Use this profile option to control whether appraisers can add participants in an Appraisal process. The default value of Yes enables appraisers to add participants. If you set it to No, appraisers cannot add participants.

HR: Authoria Integration Enabled

If you are using context-sensitive links from a button on the Oracle toolbar to the third party information product Authoria HR, set this profile option to Yes to enable the integration, or No to disable the integration. If you set this option to No, the 'Info Online' toolbar button does not link to Authoria HR from the applicable windows, and hyperlinks do not appear in the applicable self-service pages.

HR: Authoria UK URL

If you are using context-sensitive links from a button on the Oracle toolbar to the third party information product Authoria HR, set this profile option to the URL of the Authoria HR engine serving UK-related content.

HR: Authoria US URL

If you are using context-sensitive links from a button on the Oracle toolbar to the third party information product Authoria HR, set this profile option to the URL of the Authoria HR engine serving US-related content.

HR: Auto Apply Collective Agreement Entitlements

This profile option enables you to control whether the values calculated for a collective agreement during the entitlement evaluation process are applied automatically to an employee. For each entitlement item, the most beneficial value that the employee is entitled to is applied. Instances where the application cannot automatically establish the

most beneficial value are noted in the log file and you can manually make a selection using the Collective Agreement Entitlements window.

HR: Auto Evaluate Collective Agreement Entitlements

This profile option enables you to control whether the entitlement evaluation process is run automatically when an employee is first placed on a collective agreement.

HR:Automatically Synchronize Single GL Company Cost Centers with HR

If you have set the HR: Generate Organizations from GL profile so that organizations are automatically created in HR based on GL cost centers, then you can use this profile to control whether the Synchronize Single GL Company Cost Centers with HR concurrent program is automatically run following the creation of a new GL account code combination.

HR: Base Salary Required

When you set this profile option to Yes, if a person's assignment has a salary basis assigned but no pay proposal, the Description and Salary fields will be mandatory. The user will be forced to enter values for these fields.

HR: BIS Job Hierarchy - Job Grouping Level 1

Use this profile option to select the value set that represents the first level job grouping in the Job Hierarchy. Ensure that the value set you select is associated with a Job Key Flexfield structure, otherwise the Job Hierarchy will not use it.

HR: BIS Job Hierarchy - Job Grouping Level 2

Use this profile option to select the value set that represents the second level job grouping in the Job Hierarchy. Ensure that the value set you select is associated with a Job Key Flexfield structure, otherwise the Job Hierarchy will not use it.

HR:Blank Effective Date

Use this profile option to select the default value of the effective date field on the Effective Date page that appears at the start of a self-service action. When you set this profile to Yes, the effective date field is blank. When you set it to No, the page displays the default date.

The default date can differ, depending on:

- Future-dated changes for the person whose record you are updating
- The value of the profile HR:Manage Self Service actions when future-dated changes exist

The default date is usually the system date. The default date is the effective date of the future change if (1) you do not enable managing actions and (2) future-dated changes exist.

HR:Business Group

This profile option determines the business group linked to a responsibility. The Setup Business Group is defaulted at Site level.

If you use Standard HRMS security this option is automatically set up when you enter the HR: Security Profile profile option, *except* in cases where you are using a global

security profile (that is, a security profile that does not specify a business group). In this case, you must specifically set up this option for each responsibility.

If you use Security Groups Enabled security, this option is not user-configurable. The business group is determined when you create a security profile assignment using the Assign Security Profile window.

HR: Cancel Application

This profile option enables you to delete an applicant's record that has been entered in error. The default value is set to Null, this is interpreted as No and the function will not work.

HR: Check Entitlement Cache

This profile option is supplied primarily for Oracle Development or Third Party Suppliers to use. It currently has no impact on delivered functionality.

This profile option enables you to control whether the entitlement evaluation process first looks to see if a value for a particular entitlement exists in the cache before re-evaluating.

HR: Collective Agreement Logging

This profile option enables you to control whether the log file generated during the entitlement evaluation or entitlement population processes shows high or low detail. This profile only affects the processed that run from the Entitlement Results window, The log generated when you run the Collective Agreement Entitlement Evaluation process from the Submit Requests window always displays high detail and is not affected by this profile option.

HR:Contingent Worker Manager Actions Menu

This profile option controls which Manager Actions menu SSHR displays for managers who are also contingent workers. If you create a custom Manager Actions menu for contingent workers, you must change this profile option to point to your custom menu.

HR:Contingent Worker Personal Actions Menu

This profile option controls which Personal Actions menu SSHR displays for users who are also contingent workers. If you create a custom Personal Actions menu for contingent workers, you must change this profile option to point to your custom menu.

HR: Copy Period Details for Budget

You use this user profile option for HRMS budgets. When you set the profile option to Yes, the application copies all budget details (budget periods, budget sets, and funding sources) to a new budget worksheet when the worksheet is a copy of an existing budget version.

HR:Cross Business Group

This user profile option allows users of some HRMS windows to see certain information for more than one business group. If you set this option to Yes, it:

- Enables users to select benchmark jobs from other business groups
- Checks for the uniqueness of job names across all business groups and issues a warning if you attempt to enter a non-unique name

- Enforces that there can only be one master job group
- Enables users to create global competencies and rating scales
- Controls whether users can select people from other business groups in the following fields in HRMS windows:
 - Absence: authorizing person, replacement person
 - Applicant Assignment: recruiter, supervisor, referred by
 - Assignment: supervisor
 - Organization Manager Relationship: manager - also controls whether organizations from other business groups are available.
 - Events: event participants, internal contact person
 - Employee review: reviewers
 - Requisitions and Vacancies: requisition raised by, recruiter
 - Recruitment Activity: authorized by, internal contact
 - Termination: accepted by

This profile option also controls the filtering of HRMS secure views. If you set this profile option to Yes, secure views display data across all business groups. If you set this profile option to No, the views filter data by the business group of the current security profile.

Note: If you have built custom code that references HRMS secure views, the setting of the HR: Cross Business Group profile option may affect the functionality of your code.

Set to Yes if users need to see this information across all business groups. Set to No if users only work with the information defined for one business group. The default is No.

HR: CWK in Head Count Reports

This profile option determines whether contingent workers are included in head count reports.

HR: Data Exchange Directory

This profile option is used by Data Uploader and other areas of the system which need to read or import files. Set this profile to the full path for a directory accessible to the Oracle database. Files stored in this directory can then be accessed by Oracle HRMS.

HR: Data Migrator Business Group Lockout

This profile option is for a future release.

HR:Data Pump Action Parameter Group

Data pump may now be configured using action parameter groups instead of the default action parameters. This configuration enables data pump configuration to be separate to that of payroll processes that share action parameters (e.g. the THREADS action parameter) with Data Pump. You can use the HR:Data Pump Action Parameter Group profile option to specify the default action parameter group to use for Data Pump action parameters. HRMS also provides an extra concurrent program parameter to enable the action parameter group to be changed for the Data Pump run.

The default value for this profile option is Null and it is treated as Null in the code (the default action parameter group).

HR:Default Assignment Costing

Set this profile option to Yes to enable default costing for position assignments. For position control budgets, the default value is the proportional value for the budget. You can write a FastFormula to override the budget value with other costing segments and proportions.

HR:Default Check/Cheque Number Method

Use this profile option to set the automatic check/cheque number process. You can set this profile with the Organization Payment Level value to enable automatic check/cheque numbering. This profile option is for US and Canadian Payroll only.

HR: Default Correspondence Language

Specifies a default language for the Correspondence Language field.

This profile option is for users of the Italian legislation only.

HR: Default Full Name Format

Controls the default value for the full name format.

This profile option is for users of the Dutch legislation only.

HR: Default Nationality

Defines the default nationality for a user. When a new person is entered in the People window, the nationality entered here is automatically displayed in the Nationality field.

HR: Defer Update After Approval

Defers save of SSHR transactions after the final approval. The transaction is saved automatically when the Workflow Background Proces runs.

This applies to Self Service.

HR: Disable Ethnicity Tab

Enables you to disable the ethnicity tab in the People window.

This profile option is for users of the Dutch legislation only.

HR:Display Competencies

Controls the display of competencies in an Advanced Search. It is used to control the display of skill categories in:

- Apply for a Job
- Enroll in a Class

This User Profile Option is used in SSHR.

HR:Display Brief Person Name

By default this profile option is set to Brief Name, which means that on the Enter Process pages, employee names are displayed in brief format. If you prefer to see the full employee name, set this profile option to Full Name.

HR: Display Position Hierarchy

If set to Yes position hierarchy will be used in the HGrid on the Enter Process page in SSHR. By default the HGrid uses supervisor hierarchy.

HR: Employment View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This User Profile Option is used in SSHR.

HR:Enable Bank Branch Validation

Set this profile option to Yes to turn the Sort Code validation on and off. Sort Code will only appear for territories, for example GB, where branch code validation is supported. You disable the validation if you don't set this profile option or set it to N.

Note: Note: As this profile option is a global profile option, you should take care in a multi-territory Oracle HRMS implementation not to set it on with too wide a scope.

HR: Enable DTW4 defaulting

This profile option is for use by US and Canadian customers who use Vertex geocodes data to validate US and Canadian addresses. It enables or disables the defaulting of DTW4 employee tax data when an employee primary address or work address is changed. For example, set this option to No to prevent DTW4 data from being defaulted when an employee address is changed to an overseas address.

The default is Yes. This option can be set at site level only.

HR:Enable Multiple Assignments in SSHR

This profile option controls whether a manager can view and update multiple assignments for an employee in SSHR. If the profile option is set to Yes, all the assignments of a person will be displayed on the HGrid on the Enter Process page. Otherwise, only primary assignments will be displayed.

This profile option is used in SSHR.

HR: Enable Web ADI Integration

This profile option controls the functionality of the Data Export button on the Oracle HRMS toolbar. Set this profile option to Yes at Site level to enable integration with Web ADI, so that when a user chooses the Data Export button, the download process uses Web ADI. Set to No to use Application Data Exchange (ADE).

The default is No.

HR: Enforce Costing Mandatory Segment Check at Data Entry

Set this profile option to Yes to specify that users must enter a value for a mandatory costing segment at each costing level where it is qualified.

HR: Execute Legislative Check Formula within Run

Determines whether the legislation-specific check is performed during a payroll run.

HR: Expand Role of Contingent Worker

This profile option enables you to select contingent workers to perform many of the roles fulfilled by employees. For example, if you set the profile option to Yes you can select a contingent worker to be a supervisor in the Assignment window and an authorizer in the Absence window.

You are now able to select a contingent worker to fulfill the following roles:

- Supervisor
- Recruiter
- Interviewer
- Cost center manager
- Reviewer
- Event attendee
- Termination authority
- Manager

HR: Extension Agent

If you are using Info Online to allow users to access to information provider websites from a button on the Oracle toolbar, use this profile option to launch dynamic content via a web server different from the one specified by the Applications Servlet Agent.

HR: Extension Agent Client Timeout

If you are using Info Online to allow users to access information provider websites from a button on the Oracle toolbar, this profile sets the maximum time in seconds that the system waits to contact the web server mediating the connection to Authoria HR.

You should not set this value unless asked to do so by Support.

HR: Extension Agent Enabled

If you are using Info Online to allow users to access information provider websites from a button on the Oracle toolbar, this profile option controls whether or not the feature is enabled for a user or group of users. Set to Yes to enable the feature and display the Info Online button on the Oracle toolbar. Set to No to disable the feature and hide the button.

This is similar to the way that Applications Help Web Agent acts as an override to the default.

HR: FastFormula Debug Level

Enables debugging information to be output from the FastFormula compiler and execution engine.

HR: Free text school name allowed in Self Service

If this profile option is set to No, the user will not be able to enter text freely for the school name. Instead their entry will be restricted to a list of values. If the profile option is set to Yes they can enter free text, or choose from the list of values.

HR:French HRMS check mandatory payroll assignment attributes exist

This profile option enables you to control, where your business group is defined as French, whether the mandatory checks for establishment, contract and employee category attribution are performed on payroll assignments.

HR: GL Cost Center Org Classifications

This profile option defines which organization classifications are created when you synchronize your GL cost centers with your organizations in HRMS. It has the following settings:

- None
- Company Cost Centers
- HR Organizations and Company Cost Centers

HR: GL Cost Center Synchronization Options

This profile option is obsolete.

HR: GL Organization Name Format

This profile option enables you to define the name format for organizations created automatically in HRMS based on a GL cost center.

HR:Global Competence Flex Structure

Defines the competence key flexfield structure to be used when creating global competencies. If you do not have a value in this field then you will not be able to create global competencies.

HR:Grade Key Flex-Identify 1st and 2nd Segments

These options are used to control which two segments of the key flexfields appear in Person Search.

This profile option is used in SSHR.

HR: HR/Payroll Representative Source

SSHR offers three methods for determining an organization's default payroll representative:

- **From Payroll** (Further Payroll Information).
- **From GRE** (Organization Information).
- **From custom (PL/SQL) code.**

This profile option is used in SSHR.

HR: Info Online: Open in New Window

If you are using Info Online to allow users to access information provider websites from a button on the Oracle HRMS toolbar, this profile option controls whether the results are displayed in a separate browser window each time the user follows a link. Set to Yes to open a new window for each link followed; set to No to use the same window for each link.

HR: Info Online: RIA Password

If you are using Info Online to allow users to access the third party information product RIA from a button on the Oracle toolbar, this profile option controls the single sign-on capability between Oracle and RIA. Enter a valid password at user level.

Note: If you change your password on PCP then you must also update this user profile option.

HR: Info Online: RIA Username

If you are using Info Online to allow users to access the third party information product RIA from a button on the Oracle toolbar, this profile option controls the single sign-on capability between Oracle and RIA. Enter a valid username at user level.

HR: Info Online Toolbar Icon

If you are using Info Online to allow users to access information provider websites from a button on the Oracle toolbar, you can optionally use this profile option to identify an alternative icon for the Info Online toolbar button.

The image file should be in GIF format with the following attributes:

- Size: 18x18 pixels
- Transparent background colour RGB:192,192,192 (grey)
- 216 colour depth

Place the file in the virtual directory (relative to the web server used to start forms):

/OA_JAVA/oracle/apps/media

In most installations this would be the directory:

\$JAVA_TOP/oracle/apps/media.

HR: Info Online: Use Field Context

If you are using Info Online to allow users to access information provider websites from a button on the Oracle toolbar, this profile option narrows the search using predefined contexts associated with your current field and window.

Set to Yes to use the predefined contexts to narrow the search; set to No to display a list of all predefined options that are available from the selected window.

HR: Informal Name Format

Use this profile option to define the way a person's name appears in your workflow notifications. If you do not set the HR: Informal Name Format profile option, the application uses the default name structure.

Use the following values:

- \$FI - First Name
- \$MI - Middle Name
- \$LA - Last Name
- \$PR - Prefix
- \$SU - Suffix
- \$TI - Title
- \$FU - Full Name
- \$KN - Known As
- \$IF - Initial First
- \$IM - Initial Middle

HR:Job Key Flex-Identify 1st and 2nd Segments

These options are used to control which two segments of the key flexfields appear in Person Search.

This profile option is used in SSHR.

HR: Job Level

The job level options are used to determine the seniority of a person's job. You can set a default for the job level at Site, Application and Responsibility level.

HR:Local Nationality

Use this profile to set a value for nationality. This profile option is for users of the Saudi Arabia Payroll only.

The system administrator sets this option at any level of standard Security hierarchy type - Site, Application, Responsibility, and User.

The system administrator must enter a nationality code, available in the user defined-lookup_type, NATIONALITY. You cannot run the payroll until you set this profile option. If you attempt to run payroll before setting this option, the application will display an error message.

HR:Manage Self Service Actions When Future-Dated Changes Exist

If you have set the profile option HR:Allow Concurrent Self Service Actions to Yes, this profile option allows you to control potential data conflicts when future-dated changes exist.

The default setting is Stop with an Error. This will force the user to choose an effective date subsequent to any future-dated change.

Change this to Allow Approval (Notify HR Rep) to allow the user to select a date prior to any future-dated changes. After final approval the transaction will be forwarded to an HR Representative for review and manual entry into the database.

Important: If you are setting this profile option to Allow Approval, and you have enabled HR:Allow Approver Updates to Self Service Actions, Oracle recommends that you also enable HR:Refresh Self Service Actions with Data from Intervening Actions.

HR:Manager Actions Menu

Controls which actions menu is displayed for managers within SSHR. If you create a custom Manager Actions menu, you must change this profile option to point to your custom menu.

This profile option is used in SSHR.

HR: Mask Characters

Use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers. Enter a positive number of digits to display from the back (for example, xxxx345) or a negative number of digits to display from the front (for example, 123xxxx).

HR: Metalink Integration Application

Use this profile option to select the first MetaLink page that appears when you choose the Info Online toolbar button in an HRMS window. You can select a page for a specific application (for example, Human Resources or Payroll), or you can add your own choice of pages to the list using the HR MetaLink Application lookup.

HR: Metalink Integration Enabled

Set this profile option to Yes to enable links from Oracle HRMS windows to MetaLink via the Info Online toolbar button. Set to No to disable the links.

HR:Monitor Balance Retrieval

This profile enables the Monitor Balance Retrieval Debug Tool, which allows you identify database items associated with the values held in the latest balance tables, in order to reference them in the formula called by the payroll run. Set to Yes to enable monitoring, or No to disable monitoring.

HR: NI Unique Error or Warning

Enables you to change the default warning to an error message.

If you want to warn users that the national identifier they have entered already exists, leave the default as warning. If you want to prevent a user entering the same national identifier more than once, you can change the message to an error. This stops the user entering the same national identifier.

HR: National Identifier Validation

Enables you to define the validation that is used for a national identifier. There are three possible values:

- **Error on Fail** (default value). If a user enters an invalid national identifier, an error message is displayed and the user cannot save the national identifier until they have entered it in the correct format.
- **Warning on Fail**. If a user enters an invalid national identifier, a warning is displayed, but the user can save the national identifier.
- **No Validation**. A user can enter and save the national identifier in any format. No validation is performed and no message is displayed.

HR:Non-Updateable Element Set

Select a customization element set to define the element entry values that are view-only on the Element Entries window. Typically you use this user profile option to prevent updates to elements that are maintained using legislation-specific windows.

HR: Online Tax Forms Update Method

SSHR supports multiple assignments per person, and keeps tax information per assignment. Since a person can file only one withholding form, however, SSHR offers three options to handle multiple assignments:

- **Primary.** Updates primary assignments only.
- **All** (default value). Updates all assignments.
- **None.** Disables self-service updates.

This profile option is used in SSHR.

HR: OAB New Benefits Model

Enables you to set up whether you are using the new benefits model, that is, Standard or Advanced Benefits. Enter Yes, if you are using the new benefits model. Enter No, if you are using the compensation and benefit models from previous releases.

HR: Override Grade Defaults

Controls whether the end user can override the defaults in the list of values for the grade. If the profile option is set to No, the user can only select grade values from the defined list of values.

This User Profile Option is used in SSHR.

HR:Payroll Payments Self-Service Enable Multiple Assignments

This profile option is used by Payroll Payments Self-Service version 4. If it is set to No, employees can only specify payroll payments for their primary payroll assignment. If set to Yes, employees can specify payroll payments for additional payroll assignments. The default is No.

This profile option is used in SSHR.

HR:Payroll Payments Self-Service Payments List Mode

If you set this profile option to Like, you can select the organization payment method name on the basis of it being like an entry in the payments list configuration attribute instead of an exact match. The setting of Like also enables you to perform an exact match. The default of this profile option is null, which performs an exact match.

HR: Performance View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This profile option is used in SSHR.

HR:Personal Actions Menu

Controls which actions menu is displayed for users within SSHR. If you create a custom Personal Actions menu, you must change this profile option to point to your custom menu.

This profile option is used in SSHR.

HR:Position Key Flex-Identify 1st and 2nd Segments

These options are used to control which two segments of the key flexfields appear in Person Search.

This profile option is used in SSHR.

HR: Propagate Data Changes

You use this profile option to control the synchronization of your person records where you have multiple records for one person, for example if a person has local records in two different countries

If you want changes made in one business group to be propagated throughout all business groups, then set this profile option to Yes.

Note: You can only propagate changes to business groups in which your security profile allows you to make updates.

HR:Purge Element Entry Permission

Controls whether users can purge element entries (irrespective of whether those entries have been processed by a payroll run). It does not affect a user's ability to perform datetracked deletions or updates. The possible values are:

- **All** (the user can purge all element entries)
- **Information** (the user can purge only informational (non-payment) element entries)
- **None** (the user cannot purge any element entries)

Note: If you have installed a third party payroll interface, you cannot purge any element entries attached to the interface. If you are using a setting of **All** or **Information**, an error message to this effect appears when you attempt to purge an element entry.

HR:Query Only Mode

Set to Yes to restrict access to view-only for all HR and Payroll forms on a menu.

You can set this profile for individual responsibilities or users, or at the site or application level.

If you want to give query-only access to some forms and full access to other forms, set the HR:Query Only Mode profile to No and use the parameter QUERY_ONLY=YES at form function level to restrict access to individual forms.

Note: You can set the parameter QUERY_ONLY=YES for a form function that also launches a task flow. In this case, specify two parameters in the Form Function window:

QUERY_ONLY=YES

WORKFLOW_NAME="task flow name"

The entire task flow will be query-only, not just the first form.

See: Restricting Access to Query-Only Mode, page 1-98.

HR:Refresh Self Service Actions with Data from Intervening Actions

This profile allows you to control the effect of concurrent actions. If this profile is set to Yes, when a pending change is approved which affects the current transaction the application will display a warning message listing changed attributes and the data will be refreshed. If it is set to No, the default, the application will display a warning message and the transaction will fail.

Oracle recommends that this profile option is set to Yes if HR: Allow Approver Updates to Self Service Actions is also set to Yes.

Note: Oracle recommends that you enable this option if you have set the system profile HR:Manage Self Service Actions When Future-Dated Changes Exist to Allow Approval (Notify HR Rep). Otherwise you should disable this option.

HR: Restrict Letter by Vacancy or Event

This profile serves both HR and OTA letter requests. It enables you to generate separate letter requests for each event (OTA) and for each vacancy (HR).

If you set the profile to Yes, it displays the Vacancy Name field on the Request Letter window. Choosing a value in this field restricts the letter generation to applicants associated with the vacancy you choose in the Vacancy Name field.

HR:Restrict Transactions across Legislations in SSHR

If the HR:Cross Business Group profile is set to Yes, this profile can prevent SSHR managers from carrying out transactions on employees (within their supervisor hierarchy) who are from different legislations.

HR: RIA Integration Enabled

Set this profile option to Yes to enable links from Oracle HRMS windows to the web pages of third party information provider RIA via the 'Info Online' toolbar button. Set to No to disable the links.

HR:Run BENMNGLE When Processing a Self Service Action

In order to ensure that the list of eligible actions and sub-actions is up to date, you must periodically run the Participation Batch Process (Run Benefits Manage Life Events Process) for that individual. This can be set to run automatically every time a manager initiates an action by setting the profile option, HR:Run BENMNGLE When Processing a Self Service Action, to Yes.

HR: Salary View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This User Profile Option is used in SSHR.

HR: Security Profile

Restricts access to the organization, positions and payrolls defined in the security profile. This option is predefined at Site Level with the view-all security profile created for the Setup Business Group.

If you use Standard HRMS security you must set up the HR: Security Profile profile option for each responsibility.

If you use Security Groups Enabled security you must **not** set up the HR: Security Profile profile option. This is set up automatically when you assign security profiles using the Assign Security Profile window. You must only change the HR: Security Profile option by assigning a different security profile to a responsibility using the Assign Security Profile window.

HR: Self Service HR Licensed

Controls whether Self-Service HRMS (SSHR) is available. If the customer has obtained a license for SSHR, they must set this profile option to Yes at the site level.

This profile option is used in SSHR.

HR:Self Service New Hire Default Values

Specifies whether values for the new person record should be defaulted or not.

For the New Hire function, if the profile is set to Yes, then the following values are defaulted based on the primary assignment, as of the system date, of the person logged in:

- Organization
- GRE (if US)
- Payroll
- Salary Basis

The supervisor for the new person defaults to the person logged in. For both New Hire and Applicant Hire, this profile also controls which person type is defaulted.

- If the profile is set to No and there is only one person type available, then this person type is defaulted. If there is more than one available then the field remains blank and you can select a value.
- If the profile is set to Yes and there is only one person type available, then this person type is defaulted. If there is more than one available, then the field displays the person type set as the default for the system person type of Employee.

This profile is used in SSHR.

HR:Self-Service Save for Later

This profile options allows the Save for Later button to be displayed on all transaction pages in Self Service. Set it to No to disable this feature.

HR: Subrogation

Use this profile option to set a value for subrogation. This profile option is for users of the French legislation only.

HR: Supervisor Hierarchy Usage

If you are using supervisor hierarchies for security within your organization, you use this profile option to specify whether the supervisor hierarchy is person-based or assignment-based.

HR: Training View Layout

Enables a manager to see the Detail Summary View in a Form or Tabular Format.

This profile option is used in SSHR.

HR:TCA Unmerge Options

The Trading Community Architecture (TCA) Unmerge function, which removes the records of people who are only contacts from the TCA party tables, is delivered in patch 3625452 and is part of the November 2003 Family Pack (PER Family Pack G). The TCA Unmerge function uses the TCA purge parties process, which checks references to party IDs throughout the E-Business Suite. This process can take a long time to complete. Patch 3621712 provides you with an alternative approach to the TCA Unmerge process. If you apply patch 3621712 prior to installing PER Family Pack G you can use this profile option to control how the unmerge process is run. Select one of the following options:

- **Pre Stage Process**If you select this option, then, the TCA Unmerge process does not run during auto patch. Instead, you can log in as a System Administrator and submit the concurrent program Unmerge Contacts from TCA (HR TCA process) at a convenient time.
- **In Patch Process**If you select this option (which is the default option), then the HRMS component of the unmerge process is run during auto patch. A concurrent program is then submitted automatically during the auto patch process to run the TCA component of the process.
- **Deferred Process**If you select this option, then a concurrent program is submitted automatically during the auto patch process to run both the HRMS and TCA components of the process.

HR: Use Fast Formula Based PTO Accruals

This user profile option is disabled.

HR: Use Global Applicant Numbering

Enables the Global sequence for applicant numbering generation process. This sequence is shared among all business groups.

To set this profile option, you run the process "Change automatic person number generation to global sequencing". You cannot set this option in the System Profile Values window.

HR: Use Global Contingent Worker Numbering

Enables the Global sequence for contingent worker numbering generation process. This sequence is shared among all business groups.

To set this profile option, you run the process "Change automatic person number generation to global sequencing". You cannot set this option in the System Profile Values window.

HR: Use Global Employee Numbering

Enables the Global sequence for employee numbering generation process. This sequence is shared among all business groups.

To set this profile option, you run the process "Change automatic person number generation to global sequencing". You cannot set this option in the System Profile Values window.

HR:Use Grade Defaults

This profile option allows you to restrict the list of values for the grade to include only those values permitted by the parent organization, job, or position.

This Profile Option is used in SSHR.

HR:Use Standard Attachments

Disables the facility to attach short text comments to records. Enables the attachment of multiple items of various types including OLE objects, Web pages, images, and word processed documents.

HR:User Type

Limits field access on windows shared between Oracle Human Resources and Oracle Payroll. If you do not use Oracle Payroll, it must be set to HR User for all responsibilities.

Note: You must set this profile option at responsibility level.

If you do use Oracle Payroll, you can give each responsibility one of the following user types, depending on the work role of the holders of the responsibility:

- **HR User**
- **HR with Payroll User**
- **Payroll User**

HR: Use Title in Person's full name

Enables you to remove title from a person's full name so that it does not appear in person search lists, such as the Find window on the Person window.

This user profile option is only effective when you insert new records or update existing records. To remove title from existing records without updating them you should run the Remove Title from Person's Full Name concurrent process.

HR: View Payslip From Date for WEB

Limits the number of pay periods an employee can view.

This profile option is used in SSHR.

HR: Views Layer Size

Enables you to set the width of the Employee Name and Employee Number floating layer to the longest name and number you have.

This profile option is used in SSHR.

HR:View Unpublished Employee 360 Degree Self Appraisal

Enables a manager to view their employee's unpublished 360 Degree self appraisals. Set the profile option to Yes to view an employee's unpublished 360 Degree self appraisals. The default value is Null.

This profile option is used in SSHR.

HR:Webapps Tips Test Mode

Forces all tip icons in SSHR to be displayed whether tip text is defined or not.

This User Profile Option is used in SSHR.

HR: Web Proxy Host

This option is used as part of the Knowledge Management which allows the Proxy Host to be used when accessing an external site.

HR: Web Proxy Port

This option is used as part of the Knowledge Management which allows the Proxy Port to be used when accessing an external site.

HR: Worker Appraisals Menu

This profile option determines the values that are displayed in the Create poplist in the Worker Appraisals page. The default value is Employee Appraisals Menu.

HRI:Enable Captured Events Archive

This profile option is a debugging option that sets the archive mode for the events capture process. If you set this option to Yes, all events that trigger incremental processing will be archived.

HRI:DBI Force Foundation HR Processes

This profile option forces the HRI Collection Programs to run in Foundation HR mode (on a Full HR Installation). The Foundation HR mode reduces load times, by collecting data for the system date only. It does not maintain historical. If you are an HRI DBI customer, you must set this profile option to No.

HRI:Populate Assignment Events Queue

This profile option determines whether the events collection process populates the incremental update queue for the assignment events collection process. If you never run the assignment events process, set this profile option to No to reduce the load times of other processes. If you are an HRI DBI customer, you must set this profile option to Yes.

HRI:Populate Supervisor Hierarchy Events Queue

This profile option determines whether the events collection process populates the incremental update queue for the supervisor hierarchy collection process. If you never run the supervisor hierarchy process, set this profile option to No to reduce the load times of other processes. If you are an HRI DBI customer, you must set this profile option to Yes.

HRI:Populate Supervisor Status History Events Queue

This profile option determines whether the events collection process populates the incremental update queue for the supervisor status history collection process. If you never run the supervisor status history process, set this profile option to No to reduce the load times of other processes. If you are an HRI DBI customer, you must set this profile option to Yes.

HRMS: Workforce Turnover Calculation Method

This profile option determines how reports calculate annualized headcount turnover. If you select Workforce End, the annualized turnover calculation will use the headcount at the end date of the reporting period. If you select Workforce Start + End Average, the annualized turnover calculation will use the average of headcount at the start date and headcount at the end date of the reporting period.

The default is null, which means that the calculation will use the headcount at the end date of the reporting period

Limit by Persons Organization

Set this profile option to Y to limit the Compensation Objects selected by the Participation Process to only those linked to the employee's organization.

OAB:Self Registered User Responsibility

Identifies the responsibility to be granted to new users who successfully self-register in SSHR using the New User Registration processes. This profile option is seeded at site level with the seeded responsibility *Self Registered Employee Default Responsibility*. You can set this profile at responsibility level if you have created several responsibilities for different groups of users to use after initial registration.

This profile option is used in SSHR.

OAB:User to Organization Link

In the self-service New User Registration processes, links the responsibility you give to new users to register on SSHR with the organization to which they belong.

This profile option is used in SSHR.

OAB:User to Payroll Link

In the self-service New User Registration processes, provides a default employee payroll linked to the responsibility you give to new users to register on SSHR.

This profile option is used in SSHR.

PAY: Generate Periods for Tax Year

Since the lunar month has only 28 days, the yearly start date of a period would be always less than the legislation specific start date. This profile option enables you to reset the generated payroll period start date back to the legislation start date. You should set the profile option to Yes to display Reset Years in the Payroll window. The default value is No.

Personalize Self-Service Defn

This profile option enables or disables the global Personalize link and Personalize Region link that appear on self-service functions from SSHR 4.0 and above.

This profile option is used in SSHR.

PO: Services Procurement Enabled

If you use Oracle Services Procurement to provide purchase order information for contingent worker assignments, you must set this profile option to Yes.

Talent Management Source Type

This profile option points to the user lookup "PROFICIENCY_SOURCE". In the Appraisals process, when Competency Final ratings are applied to the user's personal competency profile, this profile option causes the rating value to be stored in the PROFICIENCY_SOURCE column in the PER_COMPETENCE_ELEMENTS table.

Workforce Measurement Type

This profile option determines the workforce count measure in Daily Business Intelligence. The values currently supported are Headcount, and Full Time Equivalent. The recommended value for this profile option in Daily Business Intelligence is Headcount.

Menus, Functions, and Responsibilities

Responsibilities

You can control users' access to human resources information by record, window and function.

The *responsibility* is your primary means of defining security. To define what a user can access you link a user, responsibility and Business Group to a security profile. Other important components of the responsibility are the menu structures, task flows and information types. These also help you limit the employee records a user can access.

Users can sign on to the system only through the responsibilities you give them. So their responsibilities control what they can see and do in the system.

Responsibility

A responsibility is linked to a security profile and composed of:

- A menu structure
- A request group for reporting users (optional)
- Extra information types available to the user

Responsibilities are also linked to business groups. However, depending on which security model you use, you link responsibilities differently.

- Standard HRMS Security

You can only link one business group to one responsibility using Standard HRMS security. You must set up different responsibilities for each business group.

- Security Groups Enabled Security

You can enable more than one business group for a single responsibility. However, you still only view records for one business group at a time.

Each model enables you to set up multiple responsibilities. You can assign multiple responsibilities to users who need to:

- Access applicant and employee records from two or more security profiles.
- Use more than one menu structure to view or make changes to the records they can access.
- Access records for more than one business group if you use Standard HRMS security. For example, an enterprise with international operations may have a US-Based business group and a UK-Based business group. A few of your employees might need to access both.

Access Control Through Responsibility

The following key components help control user access to Oracle HRMS:

- *Security profiles* determine the organizations, positions and payrolls whose applicant and employee records responsibility holders can access.
- *Business Groups* determine the set of records a user can access. Using Security Groups Enabled security you can enable one responsibility for many business

groups. Using Standard HRMS security you must set up a new responsibility for each business group.

- *Menu structures* and functions control:

- The particular *windows* and *functions* a responsibility holder can access

When you create a responsibility, you assign a menu structure to the responsibility. You can assign either a delivered menu or a custom menu. If required, you can restrict access to particular functions or menus using function or menu exclusions.

See: Overview of Menus and Function Security, *Oracle Applications Developer's Guide*

See: How Function Security Works, *Oracle Applications Developer's Guide*

Warning: If you exclude a function from a responsibility, a user with the responsibility can no longer access the function from any menu assigned to the responsibility. However, the function may still be attached to a task flow. If this is the case, the user will be able to access the excluded function when working through the task flow sequence. To avoid this situation, you may need to modify your task flows to remove the function.

See: Task Flow, page 3-170

- Whether he or she can perform data entry, change or deletion on these windows

You can produce configured versions of some windows. Each configured version enables access to a subset of certain types of information, such as person types, special information types, or elements. You define additional menu functions to call configured windows or task flows, and then you add these functions to a menu structure, which is linked to a responsibility.

- *Request groups* determine the group of *processes and reports* a responsibility holder can initiate. A request group is an optional component of a responsibility. If holders of a responsibility should not initiate any reports or processes, you do not include a request group in the responsibility.
- *Extra Information types* are an optional component of a responsibility. By defining which extra information types are included in a responsibility, you effectively create a configured version of a window for users who are assigned the responsibility.

Important: If you do not associate any extra information types with a responsibility, a person assigned to this responsibility will *not* have access to any extra information types in the product.

For each responsibility, you must also define the user profile option HR:User Type.

Menu Structure

Users access standard windows, configured windows, and the first window in a task flow through the menu structure displayed in the Navigator window. Each responsibility includes a menu structure to restrict the windows users can access, and what they can do on these windows.

A function is a part of an application's functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility. There are two types of functions: form functions, and non-form functions. For clarity, we refer to a form function as a form, and a non-form function as a subfunction, even though both are just instances of functions in the database.

Using *Function Security* system administrators can further restrict access to individual menu options. You can include:

- Standard windows, displayed in edit or view-only mode
- Configured windows, on which you have restricted the range of data that can be displayed
- The first window in task flows that link a number of windows that are used in sequence to complete a task

By defining menus with function security for groups of users, you can:

- Limit the range of information users can access for the applicant and employee records available to them
- Improve users' efficiency in using the system by reducing menu choices
- Restrict users to query-only access to some or all windows

Each responsibility you define must be linked to a root menu. The root menu lists the menu options when the Navigator window first opens.

The Default Menu Structure

The AutoInstall program creates a default menu structure for your HRMS product. This menu structure enables you to access all of the windows for your system. Normally, only a system administrator has access to the full default menu structure.

The supplied menus give you access to all of the available submenus. However, a number of predefined functions are not enabled on these menus. If your localization requires these menus, you need to add them for the responsibilities that should have access to these functions.

- HR View Medical
This causes the Medical Information tabbed region to display in the People window.
- HR View Background
This causes the Background Information tabbed region to display in the People window.
- HR View Benefits
This causes the Benefits tabbed region to display in the People window.
- HR View Rehire
This causes the Rehire Information tabbed region to display in the People window.
- Salary Administration: Approve
This enables the user to approve salary proposals in the Salary Administration window and the Salary Management folder.
- HR View Projects Information

This causes the Projects Information tabbed region to display in the Assignment window. You must have Oracle Projects installed to display this region.

Caution: Oracle HRMS with DateTrack and task flows does not fully support multiple active windows. When you define a new menu for use with Oracle HRMS the top menu must include the following function as a separate menu option:

Disable Multiform

See: Disabling Multiple Windows, page 1-97

Request Groups

When you build a responsibility for employees who must initiate reports or processes, you can attach a request group to the responsibility. The request group lists a group of processes and reports its holders can run. Holders of responsibilities with no request groups cannot run any processes or reports.

The group Reports and Processes gives access to all predefined reports and processes.

Structuring Menus

Using function security and the Menus window, you can use the default menu for any number of responsibilities and restrict access to the default menu options. You can also define any number of new functions and menus to restrict the access of other users. To view the hierarchy of menus you have defined, you can run the Menu Structures report.

Caution: You should not modify the default functions and menus supplied with the system. On upgrade, these defaults will be overwritten.

If you want to add window configuration options or task flows you should define your own menus.

The supplied menus give you access to all of the available submenus. However, a number of predefined functions are not enabled on these menus. You need to add them for the responsibilities that should have access to these functions.

Structuring Menus:

1. Start by drawing it out on paper. This helps you to decide the best structure and the best prompts and descriptions.
2. Decide how to structure your menus. Menus can be structured in different ways:
 - Following a Sequence of Tasks.
For example:
 1. Define a Requisition and Vacancy
 2. Define a Recruitment Activity
 3. Enter Applicant Information
 - By Type:

For example, all inquiry windows grouped together. If you structure the menu by type, the grouping is important but the sequence is not.

3. Work from the lowest level of sub-menu to the highest and define the root menu as the last step in the sequence.
4. Define as many submenus as you require under each menu option. We recommend that you restrict the number of menu levels to three because a menu structure with more levels is cumbersome to use.

Defining Menus

Use the Menus window to add predefined functions to a menu.

Caution: Oracle HRMS with DateTrack and task flows does not fully support multiple active windows. When you define a new menu for use with Oracle HRMS the top menu must include the following function as a separate menu option:

Disable Multiform

See: Disabling Multiple Windows, page 1-97

A number of predefined functions are not provided on the supplied menus. You can add them to your own menus. See: Menu Structure, page 1-94 for a list of these functions.

To define a menu:

1. Query the menu onto which to add the function.
2. Add a new line and select the function.

For example, select Salary Administration: Approve to enable users to approve salary proposals.

3. Save your changes.

See: Menu Window, *Oracle Applications System Administrator's Guide* if you need further information about using the Menus window.

Disabling Multiple Windows

In most Oracle Applications, you can open multiple windows from the Navigator window without closing the window you already have open. HRMS, however, does not support Multiform functionality.

Important: You must disable this feature on menu structures that accesses Oracle HRMS windows.

To disable the Multiple Open Window feature:

1. Add a Function type menu entry to the top-level menu referenced by your new responsibility.
2. Select the function whose User Function Name and Function Name are:
 - Navigator: Disable Multiform

- FND_FNDSCSGN_DISABLE_MULTIFORM
3. Save your changes.

Defining Menu Functions

Use the Form Functions window to define your menu functions.

Function Security helps you to control the menu options you make available to each responsibility. When you define a responsibility you can restrict the submenus or functions for that responsibility using exclusion rules.

See: *How Function Security Works, Oracle Applications Developer's Guide*

Define Menu Functions:

1. Define your menu function using the Form Functions window.
See: *Form Functions Window, Oracle Applications Developer's Guide*
2. When you have created your custom functions, add them to a menu.
See: *Menus Window, Oracle Applications System Administrator's Guide*

Caution: You should not modify the default functions and menus supplied with the system. On upgrade, these defaults will be overwritten.

If you want to add window configuration options or task flows you should define your own menus.

Restricting Access to Query-Only Mode

To restrict access to query-only mode for an individual form:

1. In the Form Functions window, select the form and specify the parameter QUERY_ONLY=YES. If you want to specify other parameters for this form function, separate them with a space.
2. Enter a user function name to identify your new function, and save it.
3. In the Menus window, select your new function instead of the supplied form function.

Using Parameters for HRMS Form Functions

To use parameters in Form Functions:

For certain options you must define menu functions that include a parameter in the Parameters field of the Form Functions window, as follows:

- If the menu entry calls a configured form, use the following parameter:
HR_CUSTOMIZATION = "customization name"
- If the menu entry calls the first form in a task flow, use the following parameter:
WORKFLOW_NAME = "task flow name"
- If the menu entry calls a form in query-only mode, use the following parameter:

QUERY_ONLY=YES

- If the menu entry calls a people management template, use the following parameter:
TEMPLATE_NAME="name of your template"
- If the menu entry calls the Define Rate form (PAYWSGEV), use the following parameter:
FORM_MODE = "grade" (for the Grade Rate window)
FORM_MODE = "spine" (for the Scale Rate window)
- If the menu entry calls the Payroll and Assignment Processes form (PAYWSACT - used in Oracle Payroll), use the following parameter:
FORM_MODE = "assignment" (for the Assignment Processes window)
FORM_MODE = "payroll" (for the Payroll Processes window)
- If the menu entry calls the Organization Manager Relationship form (PERWSCCM), use the following parameter to limit the list of organizations to those with a particular classification. You can find the organization classification code for a classification from the ORG_CLASS Lookup Type, for example the code for HR Organization is HR_ORG:
RESTRICT_CLASSIFICATION = "organization classification code"
- If the menu entry calls the Enter Person window (PERWSEMP), you use the following parameter to hide sensitive data:
HIDE_SENSITIVE_DATA = Y
- If the menu entry calls the People Management templates, you can use the following parameter to enable assignment-level security:
SECURE_ON_INDIVIDUAL_ASG="YES"

If you need to specify more than one parameter for a form function, separate the parameters with a space.

For more information about using the Form Functions window see: Form Functions Window, *Oracle Applications Developer's Guide*

AuditTrail

AuditTrail Overview

The system administrator is responsible for performing AuditTrail on Oracle HRMS data.

Performing AuditTrail

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

You enable auditing for audit groups. These are groups of tables and columns you want to audit, where you do not necessarily need to include all the columns in a given table. You typically group together those tables that belong to the same business process, such as employee compensation tables.

During your AuditTrail implementation, you need to decide your audit requirements:

- Which tables and columns you want to audit
- How you plan to report on the audit data
- How long you want to keep the audit data active
 - Audit information reports
 - Custom audit reports

See: *Oracle Applications System Administrator's Guide*.

Audit Information Reports

The AuditTrail process creates a shadow table for each audited table, to hold the audit information.

For tables that are not datetracked, you can write a report that uses the views on the shadow tables to access the audit data. However, for datetracked tables, the information from the shadow tables must be extracted and written to the HR_AUDITS table and the HR_AUDIT_COLUMNS table before you can report on it.

The system's audit report performs this additional processing. You can use it as supplied or as an example of how to report on audit information. It can report on both datetracked and non-datetracked tables that have a numeric primary key.

Note: It can report on up to approximately 90 columns in datetracked tables and 80 columns in non-datetracked tables.

The report lists every change made to the table you select in the time period you specify when you run the report. You can restrict the reported changes to those made by a specified username. The changes are listed by date and time of the change. For each change, the report shows:

- The date and time of the change
- The user ID who made the change

- The type of change
- The fields that changed and either their old values, or their new values, or both, depending on the type of change

Table of Transaction Types in the Audit Report

The following table lists the 12 types of change and the information shown in the audit report for each type.

Type of Change	Field Values Shown in the Report
Normal Insert (creates a non-datetracked record)	The non-null values in the new record.
Normal Update (updates a non-datetracked record)	The old and new values for all fields that changed.
Normal Delete (deletes a non-datetracked record)	The non-null values in the record that was deleted.
DT First Insert (creates a datetracked record)	The non-null values in the new record.
DT Update (date-effectively ends the last row on a datetracked record and creates a new row)	The old and new values of all fields that changed, and the new effective end date on the old row.
DT Correction (corrects a row of a datetracked record and does not change the effective dates)	The old and new values of all fields that changed, and the effective dates of the corrected row.
DT Replace (creates a new row on a datetracked record that replaces all rows that start after its start date)	The non-null values in the rows that were deleted, the new effective end date on the row preceding the new row, and the old and new values of all fields that changed.
DT Insert (creates a new row on a datetracked record that ends on the old effective end date of the preceding row)	The old and new values of all fields that changed, and the new effective end date on the row preceding the new row.
DT Purge (deletes all rows of a datetracked record)	The non-null values in all rows of the record that was deleted.

Type of Change	Field Values Shown in the Report
DT End Date (adds an effective end date to the last row of a datetracked record)	The new effective end date of the row.
DT All (sets a new effective end date on a row of a datetracked record and deletes all following rows)	The non-null values in the rows that were deleted, and the new effective end date on the last row.
DT Next (deletes a row of a datetracked record and uses its effective end date to set an new end date on the preceding row)	The non-null values in the row that was deleted, and the old and new effective end dates on the preceding row.

Custom Audit Reports

If you want to design your own audit report, you can copy the supplied report and use it as the basis of your own version. The supplied report uses a dynamic SQL structure to retrieve information for the report, and an Oracle Report to format it.

Dynamic SQL Structure

For a non-datetracked table, the dynamic SQL structure retrieves information and uses a private procedure to retrieve the new values for an update.

For a datetracked table, the dynamic SQL structure retrieves information from the function and procedure created for each datetracked table by the Audit Trail Update Datetracked Tables process:

- The *tablename*_TT function identifies the type of datetracked transaction represented by each row of the shadow table.
- The *tablename*_VP procedure gets new values from the shadow table for update and insert transactions. It writes these to the HR_AUDITS and HR_AUDIT_COLUMNS tables.

The dynamic SQL structure comprises several character strings, which are concatenated into one long string, then parsed and executed using the dynamic SQL generator. If you change a string, you must ensure that you do not exceed the text space allocated to it, as listed in the package header.

The structure is built up by identifying the audited table column information, which is retrieved from the FND_AUDIT_COLUMNS table. The logic varies depending on the data type being audited.

The package for the dynamic SQL is called py_audit_report_pkg. It is found in the script pyadyn.pkh/pyadyn.pkb.

HR Audit Tables

The HR_AUDITS table holds audit information about the transaction. The HR_AUDIT_COLUMNS table holds the changed column information for that transaction.

HR_AUDITS Table

The following table shows the structure of the HR_AUDIT table:

COLUMN	TYPE	NULL
audit_id	number(15)	not null
commit_id	number(9)	not null
current_session_id	number	not null
primary_key	varchar2(30)	not null
primary_key_value	number(15)	not null
sequence_id	number(9)	not null
session_id	number	not null
table_name	varchar2(30)	not null
timestamp	date	not null
transaction	varchar2(30)	not null
transaction_type	varchar2(30)	not null
user_name	varchar2(100)	not null
effective_end_date	date	null
effective_start_date	date	null

HR_AUDIT_COLUMNS Table

The following table shows the structure of the HR_AUDIT_COLUMNS table:

COLUMN	TYPE	NULL
audit_id	number(15)	not null
column_id	number(9)	not null
column_name	varchar2(30)	not null
new_value	varchar2(240)	null
old_value	varchar2(240)	null

Setting Up AuditTrail

Setting up AuditTrail is usually a task for the system administrator.

The first six steps are required to enable auditing of any Oracle Applications table. They are explained in more detail in the *Oracle Applications System Administrator's Guide*. The final step is required only for tables in the HR application.

To set up AuditTrail:

1. Have your database administrator grant SELECT privileges on SYS.DBA_TABLES to the APPLSYS account. Normally this step will already have been done as part of your installation or upgrade.

Using a System Administrator responsibility:

2. In the System Profile Values window, set the AuditTrail:Activate profile option to Yes at Site or Application level.
3. In the Audit Installations window, query the application(s) you want to audit, and check the Audit Enabled box next to the Oracle User Name.
4. In the Audit Groups window, query the application and enter a name for the audit group, then select the tables you want to audit (using the User Table name). For a new audit group, select Enable Requested in the Group State field.
5. In the Audit Tables window, query each table you want to audit, and select which columns in these tables you want to audit.

Note: You cannot audit LONG, RAW, or LONG RAW columns.

6. In the Submit Request window, run the AuditTrail Update Tables process. This process:
 - Creates database triggers on your audited tables
 - Creates one shadow table for each audited table, to contain the audit information
 - Builds special views on non-datetracked tables, which you can use to retrieve your audit data for reporting

Using an HR Manager responsibility:

7. In the Submit Request window, run the AuditTrail Update Datetracked Tables process. For each datetracked table, this process:
 - Creates an index on the shadow table
 - Creates the function *tablename_TT* and the procedure *tablename_VP*, which extracts information from the shadow table when you run the predefined audit report

Important: You must rerun the AuditTrail Update Tables process and the AuditTrail Update Datetracked Tables process if you make any changes in the Audit Groups or Audit Tables windows.

Disabling AuditTrail

To disable AuditTrail:

1. You can disable the auditing of an audit group at any time by selecting a Disable state in the Audit Groups window.

Tip: If you are planning high volume transactions on an audited table, such as loading a batch of information from another system, consider disabling auditing for the table's audit group. This will enable the batch loading to complete more quickly.

Before you restart auditing, you should archive your audit data, according to your business needs, and purge the shadow tables. You purge the tables by setting the audit group to Disable - Purge Table and running the Audit Trail Update Tables report. To restart auditing, you set the audit group to Enable Requested and rerun the Audit Trail Update Tables process and the Audit Trail Update Datetracked Tables process.

Running the Predefined Audit Report

You can run an audit report using the system's predefined structure, or you can design your own audit report.

To run the predefined audit report:

1. Using an HR Manager responsibility, open the Submit Request window and select Audit Report in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select an audited table (that is, one in an audit group) using the Table name.
4. Select a value for the Initialization parameter:
 - **Yes** means that the report removes any existing data related to your selected table from the HR_AUDITS table and the HR_AUDIT_COLUMNS table. It then populates these tables with the current values from your selected table and reports on these.
 - **No** means that the report runs on the existing data in the HR_AUDITS table and the HR_AUDIT_COLUMNS table.
 - **Refresh** means that the report removes existing data for *all* tables from the HR_AUDITS table and the HR_AUDIT_COLUMNS table. It then populates these tables with the current values for your selected table and reports on these.
5. If you only want to report on the changes made by one user, enter the user name.
6. Enter start and end dates to limit the time period for reporting audit information.
7. Choose the Submit button.

You can use the View Requests window to check the progress of the report.

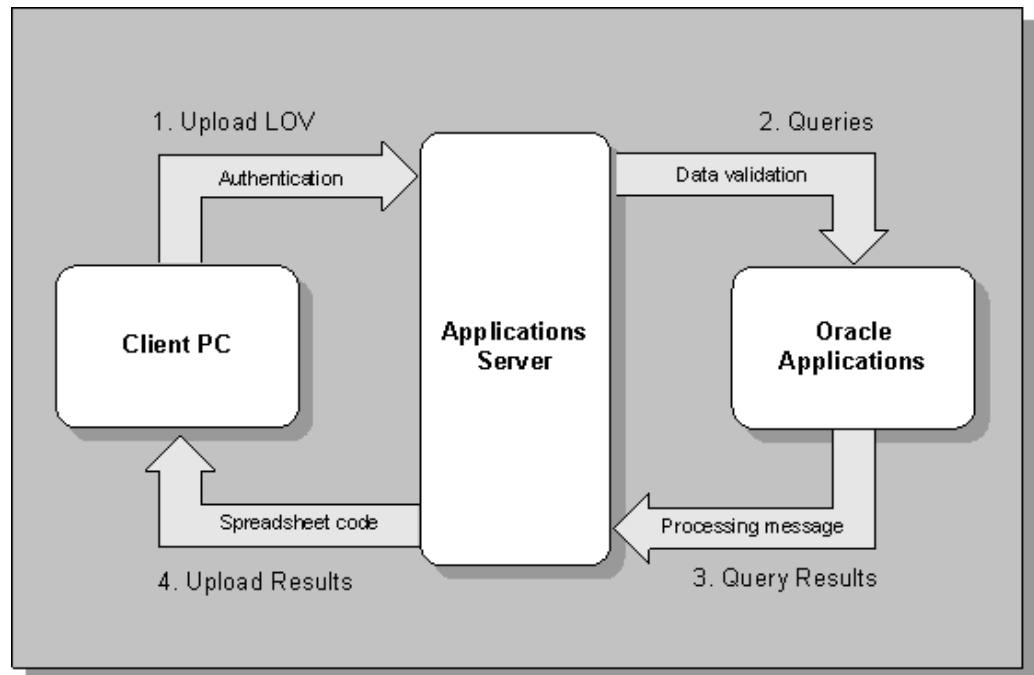
Desktop Integration

Desktop Integration Overview

Web Applications Desktop Integrator (Web ADI) is a self-service Oracle application, accessed using a browser. The Web ADI software is not installed on individual client machines, as the processing takes place on the server rather than on individual client PCs.

Web ADI generates Microsoft Excel or Word documents on your desktop, and downloads the data you have selected from the application. You can modify the data in the Microsoft Excel or Word documents, working either online or offline, and upload the data using Web ADI.

How Web ADI works



Configurable layouts determine the appearance of the spreadsheet or word processing document. System administrators can restrict the fields that users access in the spreadsheet, and can create different layouts for different users. Experienced users can also create their own layouts to include just the fields they need.

Web ADI is used in HRMS forms, such as Person, Assignment, People and Assignment folders, and Salary Approvals, in letter requests, in the Rapid Implementation Workbench, for reports in the Compensation Workbench, and for configuring links in Knowledge Integration.

See: Data Download and Upload using Web ADI, page 2-4

Alternatively, you can use the concurrent processing method to set up your standard letters. With concurrent processing, you generate and review your letters without interrupting other work you perform at your computer. You can control when a concurrent process runs and schedule long-running processes to run at times when the system is not busy.

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors
- Using Oracle Reports

See: Concurrent Processing, page 2-31

Desktop Integration

You can download data from your Oracle HRMS application to spreadsheets or word processing documents on your desktop using Web ADI.

Can you download data from a window in Oracle HRMS?

Yes. Oracle HRMS is supplied with certain windows already set up to enable you to download data. In addition, your system administrator can configure the system so that you can download from other windows in the Professional User Interface (Forms interface).

Can you modify data downloaded from Oracle HRMS windows and upload the modified data back to the application?

Yes, provided that the system has been configured to enable upload, and that you have the appropriate upload access rights.

Can you upload data from legacy systems using Web ADI?

Yes. By incorporating a text file into the spreadsheet you create using Web ADI, and then uploading the data to the database, you can upload data from legacy systems.

Does Web ADI check that information is not being overwritten when you upload?

Yes. Error checking is carried out by the Application Programmatic Interfaces (APIs) used to upload the data. If errors are found, the data is not uploaded to the Oracle database.

Can you create standard letters using data from Oracle HRMS?

You can generate standard letters by downloading employee data into a template letter to form a mail merge letter. You can also save the template letter in the Oracle application database.

Do you need a separate licence for Web ADI?

No. Web ADI is available when you purchase Oracle HRMS.

Can you reuse ADE information with Web ADI?

Much of the information required by Application Data Exchange (ADE) can be converted for use with Web ADI. Views that you have created for use with ADE can be reused, and ADE style information can be converted to a format suitable for use by Web ADI.

Do you need to install Web ADI on individual user PCs?

No. Unlike ADE, Web ADI does not require separate installation on client PCs.

What types of standard letter can you create?

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

Here are a few examples of letters you can set up to help you to manage recruitment or enrollment activities:

Oracle Human Resources	Oracle Learning Management
Acknowledgement letters (for all active applications)	Acknowledgement letters (for all requested enrollments)
Confirmation letters (for interviews)	Confirmation letters (for placed enrollments, including event joining instructions based on the date, venue, and trainers)
Reports for interviewers and schedules	Reports for trainers (listing the students to attend an event)
Offer and Rejection letters (for applicants)	Chase-up letters (for non-response or non-payment)
	Acknowledgement letters (for cancellations)
	Certificates (of successful course completion)

Data Download and Upload Using Web ADI

Data Download and Upload Using Web ADI - Overview

You can download data from your Oracle HRMS application to spreadsheets or word processing documents on your desktop using Web ADI.

You can query the data in a window, download the queried data to your desktop, and view the data in spreadsheet format or in a word processing document.

In some cases, you can manipulate the data you have downloaded, and upload your changes back to Oracle HRMS. Validation of the data takes place by the Application Programmatic Interfaces (APIs) used to upload the data, and any errors are flagged. If errors occur, no data is uploaded to the database.

You can create a mail merge by downloading the data directly into a template letter.

You can create an empty spreadsheet and enter new data into it, or bring in the data from a text file, then upload the data into Oracle HRMS. The data is validated using the usual HRMS validation.

Standard Oracle security is maintained.

Methods of Running Web ADI

You can invoke Web ADI from an icon in an HRMS Professional User Interface window (including OLM windows), or you can launch it directly from a Web ADI self-service menu option.

You cannot invoke Web ADI from the People Management templates, the Absence Detail window, or the self-service HRMS screens. In addition, you cannot invoke Web ADI from the Assignment window when it is accessed by task flow from the Person window. However, you can invoke Web ADI from the Assignment window accessed directly from the Navigator.

Your access to Web ADI depends on the access rights set up for your responsibility.

Integrators

The functionality available with Web ADI depends on the information stored in an "integrator". Each integrator contains all relevant information about a particular data download, upload, or create process, such as whether you are downloading data from an HRMS window, from a Web ADI self-service window, or from the Request Letter window. It also specifies whether you can download one-way or whether you require the ability to upload edited data again, whether the data is being downloaded into a mail merge, and so on. The integrator details also indicate whether you can use it to create new data or just update existing data.

When you create your spreadsheet or word processing document using Web ADI, you select an appropriate integrator, and Web ADI handles the transfer and validation of data accordingly.

Predefined Integrators

Oracle HRMS supplies a number of integrators that enable you to carry out a one-way download of data from the following windows and folders, for reporting or analysis purposes:

- People window - "HR People Details" integrator
- People folder - "HR People Folder Detail" integrator
- Assignment window (accessed directly from the Navigator) - "HR Assignment Detail" integrator
- Assignments folder - "HR Assignment Folder Detail" integrator

Another supplied integrator enables you to download data, edit the data, and upload it again to the application, from the following folder:

- Salary Management folder - "HR Update Salary Proposals" integrator

In addition to the supplied integrators, your system administrator can configure Web ADI to download data from other HRMS windows or directly from the application database, by setting up new integrators as required. See: Configuration of Data Download and Upload, page 2-10

Key Concepts

An understanding of the following terms may assist you in downloading and uploading data between Oracle HRMS and your desktop using Web ADI.

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.

Content

When you create a spreadsheet or word processing document, the *layout* defines the columns that appear in the document and the content identifies the data in the document. Content is usually downloaded from the Oracle application database, so that the spreadsheet contains the data you have queried from a window in Oracle HRMS. You can also create a spreadsheet with no content, so that you can enter new data using the spreadsheet and upload it to the application. Another method is to bring in the content of the spreadsheet from a text file on your desktop. This enables you to upload the data from the text file to the application, for example to upload legacy data or information from third-party applications to Oracle HRMS.

Download

This is the process of transferring data from the Oracle HRMS application to your desktop (the original data remains in the application database).

Integrator

An integrator defines all the information that you need to download or upload from a particular window or database view or for a particular purpose (the type of integrator determines the purpose for which you can use it). Your system administrator can set up the appropriate integrators depending on whether you want to download for reporting or mail merge purposes, or in order to manipulate the data and upload it again.

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. In HRMS, interfaces can be views (for downloading data) or APIs (for uploading data). The integrator includes all the columns that are available in the interface, whereas the *layout* specifies only those that the user needs to see.

Layout

A layout indicates the columns to be displayed in a spreadsheet or Word document. You can have more than one layout for the same integrator, for use in different situations, or by different people. For example, you could have several different layouts for the HR People Details integrator (which is available from the People window), one containing just the First Name, Last Name, and Telephone Extension fields for use in printing out a telephone list, another containing email addresses, and so on. If more than one layout is available for an integrator, you can choose the one you want when you create a document. If only one is available, it is automatically selected for you.

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. When Web ADI creates the spreadsheet, it ignores any columns from the text file not included in the mapping.

Template Letter

This is a 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.

Upload

This is the process of transferring the data from a spreadsheet on your desktop back to the Oracle HRMS application, overwriting the existing data in the application database. This process can take place only if Web ADI created the spreadsheet.

View

A view is an example of an interface that you can use to download data from the application to a spreadsheet. The integrator definition includes the name of the view. Views to access many windows are already available with Oracle HRMS. System administrators can create additional views if necessary.

Viewer

A viewer is a desktop application, such as a spreadsheet or word processing tool, that you use to view the data downloaded from Oracle HRMS.

Data Download Using Web ADI

You can download data from your Oracle HRMS application to a spreadsheet or word processor on your desktop. You can then use the features of your spreadsheet or word processing tool to manipulate data for analysis and reporting purposes.

You can download from within a window in the HRMS Professional User Interface (including OLM windows), or directly from a Web ADI self-service page.

You can save the spreadsheet that you have created and return to it later. The spreadsheet includes all the data you have downloaded. You can refresh the data without creating a new spreadsheet by carrying out a new download directly from the spreadsheet, without recreating the spreadsheet.

See: Data Upload Using Web ADI, page 2-7 and Letter Generation Using Web ADI, page 2-8

Downloading from an HRMS Window

This method enables you to use the query you enter in the window to specify the records to download.

Downloading from a Self Service menu Function

This method enables you to apply values at runtime so that you can specify the records to download.

Downloading an Empty Spreadsheet

You can download an empty spreadsheet from the ADI web page (that is, containing the columns you want, but no data), and then use the spreadsheet to enter new data.

Downloading an Empty Spreadsheet and Incorporating Data from a Text File

You can download the structure of your spreadsheet using Web ADI, but instead of downloading the content of the spreadsheet from the applications database, you can incorporate a text file in the spreadsheet as you create it, and then upload the data from the text file to the database. See: Data Upload Using Web ADI, page 2-7

Format of Text files

Text files must be in delimited format, separated by commas or other standard characters. You can use text files that include or exclude headings in the first line.

Data Upload Using Web ADI

You can use Web ADI to upload data that you have previously downloaded to a spreadsheet, or data that you have entered in an empty spreadsheet. You can do this only if the spreadsheet was created using an upload integrator.

Features of Data Upload

You can only upload data using an integrator that has been created for this purpose (for example, the HR Update Salary Proposals integrator available from the Salary Management folder). You must specify at the time you download the data that you intend to upload it again, by unchecking the Reporting check box. You must also have access to a responsibility that gives you access rights to upload data as well as download it.

Data to be uploaded is validated before the upload occurs. You must ensure that you enter values in all mandatory fields, so that validation is successful when the data is uploaded to the application. If you do not, the data is not uploaded, and an error message appears in the Messages column in the spreadsheet for the record with the invalid data.

For example, if you are using the HR Update Salary Proposals integrator, you must enter values in the Proposed_salary and Change_date fields, as a minimum, for any row you want to upload. If your organization has created its own integrators for uploading data, your system administrator can tell you which fields you must enter.

When you change any field in the spreadsheet, the row is flagged for upload. By default, only flagged rows are uploaded. You can change this setting so that all rows are uploaded.

Letter Generation Using Web ADI

You can generate mail merge letters from Oracle HRMS using Web ADI.

Web ADI retrieves the data and downloads it directly into a template letter (which you can also store in the Oracle applications database) to form the mail merge.

When you create a document for a mail merge, ensure that you select Word as the viewer, and check the Reporting check box.

Your system administrator must set up integrators to enable the letter generation to take place.

In addition, the layout associated with the letter generation process must have the same name as the letter created in the Letter window in the Oracle HRMS application. This associates a letter with an assignment status in Oracle HRMS or an enrollment status in OLM, and links the letter to the layout.

Implementing Web ADI for use with Oracle HRMS

The following implementation steps are required to implement Web ADI for use with Oracle HRMS.

See also the *Oracle Web Applications Desktop Integrator for Oracle Applications Release 11i Configuration Guide*, Note 177073.1, available on MetaLink.

HR: Enable Web ADI Integration Profile Option

In the System Profile Values window, the HR: Enable Web ADI Integration profile option default is Yes. The Web ADI pages open when you choose the Export Data icon on the toolbar of an HRMS window.

To use Application Data Exchange (ADE) instead of Web ADI, change this profile option to No at Site level. This change enables the Export Data icon to launch Application Data Exchange (ADE) software.

Web ADI Menu Options

1. The supplied Web ADI responsibility and self-service menu give access to the following menu options:
 - Create Document

- Define Layout
- Define Mapping
- Manage Document Links

Give users access to this responsibility, or attach this menu to their responsibility, if they need to access Web ADI from the self-service menu (without going through one of the HRMS application windows), or if they need to define layouts or mappings, or create links between template letters and layouts.

See the *Oracle Web Applications Desktop Integrator for Oracle Applications Release 11i Configuration Guide*, Note 177073.1, available on MetaLink, for further details about this menu.

2. A self-service menu "HRMS ADI Document Manager Menu", is supplied for use with Web ADI. This contains the Document Management menu option and required functions. Add this menu to the main menu attached to the responsibilities of any users who need access to the Document Management features.
3. The supplied function "Web ADI Create Document" gives access to Web ADI from any HRMS window.

Important: You must add this function to the main menu attached to the responsibilities of any users who need access to Web ADI from an HRMS application window.

4. The Create Document menu option on the Web ADI menu includes integrators for all applications. An alternative self-service menu, "HRMS ADI Create Document menu" is supplied, containing the menu option "HRMS Create Document". This restricts the list of integrators to HRMS application integrators that are not launched from a window (that is, where the FORM_NAME parameter for the integrator is "GENERAL").

If you create your own "GENERAL" integrators, you need to change the parameters of this function from:

- &bne:integrator=800:GENERAL%25

to:

- &bne:integrator=800:GENERAL%25,999:GENERAL%25

replacing 999 with your own Application ID.

5. If only one option is available in Web ADI, the page automatically defaults the option. If all the options on a screen are defaulted, the page is skipped, so that the end user does not have to fill them in. The user only sees the final 'Review' page. To remove the Review page that appears at the end of the Web ADI wizard, edit the "HRMS Create Document" or "Web ADI Create Document" function, and change the parameters of the function, by appending:
 - &bne:noreview=true
6. To restrict users to carrying out download-only operations, edit the "HRMS Create Document" or "Web ADI Create Document" function, and change the parameters of the function, by appending:
 - &bne:reporting=Y

7. Integrators provided by HRMS for setup purposes may be grouped by creating a function similar to the "HRMS Create Document" by changing the following:

- `&bne:integrator=800:GENERAL%25`

to

- `&bne:intergator=800:HR_SETUP%25`

This function may be added to menus for users with privileges to create and edit integrators.

Configuration of Data Download and Upload Using Web ADI

In addition to the Web ADI integrators supplied with Oracle HRMS, you can create your own integrators to allow download and upload from windows in Oracle HRMS or direct from Web ADI, create merge letters, and upload data from text files.

Views for Web ADI

Depending on the information you want to download, you may find it necessary to create new views for use with Web ADI. You can use existing views supplied with HRMS, if a suitable view exists.

Note: To identify a view used by a window in Oracle HRMS, display a record in the window, and choose Help > Diagnostics > Examine... from the menu. In the Examine Field and Variable Values dialog box, select SYSTEM in the Block list of values and LAST_QUERY in the Field list of values. You can then scroll through the SQL query that appears in the Value field to obtain the view name.

APIs for Web ADI

The seeded HR Update Salary Proposals integrator, available from the Salary Management folder, uses the HR_UPLOAD_PROPOSAL_API.

For details of APIs you can use for uploading data, see: Publicly Callable Business Process APIs in Oracle HRMS, page 3-85

Note: HRMS APIs use IDs in their parameters rather than user-friendly data. Therefore, when you define Upload or Update Integrators, write wrapper packages to convert or preprocess the data before calling the APIs.

Integrators for Web ADI

To enable users to download, create merge letters, or upload newly created or updated data, either from within an HRMS window or direct from Web ADI, you need to create integrators of the appropriate types.

To create new integrators, you use the Create Document menu option in Web ADI to create an empty spreadsheet containing all the columns you need to fill in to create an integrator. Oracle supplies an integrator for this purpose: the "HR Integrator Setup" integrator. You then enter the relevant data into the spreadsheet and upload it to the database.

You can apply a restriction to a standalone integrator using the "HR Create Standalone Query" integrator, or you can update a runtime restriction using the "HR Maintain Standalone Query" integrator.

You can disable Integrators using the HR Disable Integrator integrator.

Note: This integrator does not disable integrators created for the HRMS Application which are pre delivered with the application. Therefore, if you create your own integrator, you should specify your own custom application name when creating the new integrator, so that you can disable it if required.

So that your users can easily identify the integrator they need to use, use a standard naming convention for the integrators. For example, names could begin with HR, include the name of the window or a clear indication of the type of information they contain, and indicate whether they are for download only, download and upload, or letter generation.

For information about defining standalone queries, see: Defining Standalone Integrator Queries, page 2-18

For information about maintaining standalone queries, see: Maintaining Standalone Queries, page 2-19

For information about disabling queries, see: Disabling Standalone Integrator Queries, page 2-20

Controlling Access to Integrators

You must control access to integrators using form functions with menus. You can optionally add further access control by responsibility.

Form Functions with Menus

For each custom integrator, you decide which form functions will control access, and create the form function. You can create a unique form function for each integrator, or you can group integrators by form function.

After you create the form functions, you add them to the Responsibility menus to give your users access to their custom integrators.

Each predefined integrator is associated with a form function, as shown in the following table:

Predefined Integrator	Form Function (Internal Name)	Form Function (User Name)
HR Assignment Detail	HR_ADI_CAG_ASG_DETAIL	HR Assignment Detail Integrator
HR Assignment Folder Detail	HR_ADI_CAG_ASG_FOLDER	HR Assignment Folder Integrator
HR People Details	HR_ADI_CAG_PEOPLE_DETAILS	HR People Details Integrator
HR People Folder Detail	HR_ADI_CAG_PEOPLE_FOLDER	HR People Folder Detail Integrator
HR Update Salary Proposals	HR_ADI_CAG_UPD_SAL_PROP	HR Update Salary Proposals Integrator
HR Create Standalone Query	HR_ADI_CAG_SETUP_CREATE_QRY	HR Create Standalone Query Integrator
HR Disable Integrator	HR_ADI_CAG_SETUP_DISABLE	HR Disable Integrator Integrator
HR Create Integrator Responsibility Restrictions	HR_ADI_CAG_SETUP_INTG_RESP	HR Create Integrator Responsibility Restrictions Integrator
HR Maintain Standalone Query	HR_ADI_CAG_SETUP_MAINTAIN_QRY	HR Maintain Standalone Query Integrator
HR Maintain Integrator Form Function Associations	HR_ADI_CAG_SETUP_MAINT_FUNC	HR Maintain Integrator Form Functions Integrator
HR Maintain Integrator Responsibility Restrictions	HR_ADI_CAG_SETUP_MAINT_RESP	HR Maintain Integrator Responsibility Restrictions Integrator
HR Integrator Setup	HR_ADI_CAG_SETUP_SETUP	HR Integrator Setup Integrator

You add the form function associated with the integrator to the users' menus. Oracle HRMS provide an example menu, HR_ADI_CAG_FORM_FUNCTIONS (internal name) or HR ADI Seeded Integrator Form Functions (User Name), which references all of the predefined integrators mentioned above. You can use this menu to grant access to all your users, or you can copy this menu and modify it as required.

Responsibilities

You can optionally restrict integrators by responsibility using the "HR Create Integrator Responsibility Restriction" integrator. If you create a restriction for an integrator, only users who have access via the responsibility will be able to access the integrator. You can link integrators to multiple responsibilities. The restriction applies only when you launch Web ADI from the Professional User Interface (PUI) window.

You can update or remove the restriction using the "HR Maintain Integrator Responsibility Restrictions" integrator.

Note: Oracle recommends that you control access to integrators using the form functions and menus instead of responsibility restrictions. Use of form functions and menus provides a greater degree of control over user access.

For information about restricting integrators by responsibility, see: *Controlling Integrator Access*, page 2-20

Layouts for Web ADI

To use the integrator, you must set up at least one layout. If there is more than one layout, users must choose one. Ensure that the layout contains all mandatory fields and any other fields the user will need.

You should ensure that the name of the layout gives a clear indication of its purpose.

Additional Information

For information about setting up and configuring Web ADI, see also the *Oracle Web Applications Desktop Integrator for Oracle Applications Release 11i Configuration Guide*, Note 177073.1, available on MetaLink.

Upgrade Information for Converting from ADE to Web ADI

This section provides information about upgrading to Web ADI for customers who are currently using Application Data Exchange (ADE) to transfer information between Oracle HRMS applications and desktop tools.

Comparison of Features in ADE and Web ADI

For details of the features available in Web ADI, see: *Data Download and Upload Using Web ADI: Overview*, page 2-4

The method of operation of Web ADI is different from that of ADE, and terms used in ADE do not always have an exact equivalent. The following table lists terms used in ADE and the equivalent functionality in Web ADI.

Table of ADE and Web ADI Terminology

ADE	Web ADI
Style	Integrator
Style columns (columns set as displayed)	Layout
View name	Content
Style columns (queried from view)	Content columns
API name	Interface
Style columns (making up API parameters)	Interface columns
Style columns (that are view columns and API parameters)	Mapping
Style - Form Name	HR Integrator Setup - FORM_NAME parameter
Style - Letter Name	Layout Name (for Letter Request integrators)

Note: Customers converting from older versions of Oracle HRMS and ADE, in which ADE included hierarchy diagrammers, should note that the hierarchy diagrammers functionality is now available from standard windows in the HRMS Professional User Interface.

Additional Features in Web ADI

The following additional features are available in Web ADI:

- In addition to the ability to upload data that you have previously downloaded from a spreadsheet to the Oracle application database, Web ADI enables you to upload new data from legacy systems.
- Web ADI enables you to store your mail merge template letters in the Oracle application database

Prerequisites for Upgrading from ADE to Web ADI

The following information may assist you when upgrading from ADE to Web ADI.

Views

When creating new integrators for use with Web ADI, you may need to create a suitable view. If you have views that you have created for use with ADE, you can reuse these views.

Styles

You can convert existing styles in ADE to Integrators in Web ADI. See: Converting ADE styles to Web ADI Integrators, page 2-28

The conversion process uses a new concurrent process called Upgrade from ADE to Web ADI. This is available in the Global SHRMS Reports & Processes request group, attached to the Global Super HRMS Manager responsibility.

Profile Options

HR: Data Exchange directory

Information on ADE styles is stored in an ADE.INI file located either on individual user desktops or on a shared drive. The Upgrade from ADE to Web ADI concurrent process uses this file to convert ADE styles to Web ADI integrators.

To use this concurrent process, you need to copy the ADE.INI file to a directory accessible to the Oracle database. The path to this directory must be within the UTL_FILE_DIR setting for your database, and must be specified in the HR: Data Exchange directory profile option.

HR: Enable Web ADI Integration

A new profile option, HR: Enable Web ADI Integration controls the use of Web ADI. This profile option's default setting is Yes at site level, indicating that the Data Export button on the toolbar links to Web ADI.

To use ADE instead of Web ADI, set this profile option to No at the required level. When a user chooses the Data Export button on the toolbar, the download process uses ADE.

Downloading Data to your Desktop using Web ADI

You can download data from Oracle HRMS to a spreadsheet or word processor using Web ADI, either from within a window in the HRMS application, or directly from a Web ADI page without accessing HRMS.

See: Data Download Using Web ADI, page 2-6

To download data to a document from an HRMS window:

1. Navigate to the window from which you want to download the data, for example, the People window.
2. Enter a query to return the records you want to download.
3. Choose the Export Data icon on the toolbar. The Settings page of the Web ADI wizard appears.

Caution: When moving between Web ADI pages, do not use your browser's Back or Forward buttons, as this causes information to be lost; instead, use the Back, Next and Cancel buttons displayed on the Web ADI page.

4. Select the viewer you want to use to display the document. If you intend to edit the data and upload it again, select a spreadsheet viewer. If several different versions of a viewer are available, your system administrator can tell you which version is appropriate.
5. Select the Reporting check box if you are downloading data for reporting or letter generation purposes. If you want to edit the data in the spreadsheet and upload it to

the application again, leave this box blank. You cannot upload data if the Reporting check box is selected when you download the data.

Note: You can only upload data using an integrator that has been set up to allow upload. Check with your system administrator to ensure that an appropriate integrator is available.

6. If more than one integrator is available for the HRMS window from which you ran the query, the Integrator page appears. Select an integrator.
7. If more than one layout is available, the Layout page appears. Select the appropriate layout.
8. All other information is defaulted, and a Review page displays technical details of the document that will be created. Choose the Create Document button to continue.
9. A spreadsheet or word processing document is created and displayed using the viewer you selected, and the data from the records you queried is added to the spreadsheet. Confirmation messages appear as the document is created.

The data downloaded to the document depends on the query you entered in the window and the columns in your layout.

Note: You may want to save the spreadsheet on your desktop at this stage, as otherwise the spreadsheet and the data it contains will be lost from your desktop when you close the spreadsheet (the data remains in the Oracle application).

To use integrators from the Web ADI self-service menu:

You can download application data to an existing spreadsheet, or download a spreadsheet layout.

Caution: To move within the application, use the application's Back, Next, and Cancel buttons only.

1. Select Create Document from the Web ADI self-service menu. The Settings page of the Web ADI wizard appears.
2. Select a viewer to display the document. If you want to upload data, then select a spreadsheet viewer. If several different versions of a viewer are available, ask your system administrator which version to use.
3. If you want to upload data, deselect the Reporting check box.

Note: You can only upload data using an integrator that allows uploads. Check with your system administrator to ensure that an appropriate integrator is available.

4. In the Integrator page, select an integrator from the list.
5. In the Layout page, select the appropriate layout.
6. In the Content page, select None to create a spreadsheet layout only, if you are not downloading data from the database to the spreadsheet. Select the default content to download data from the database.

7. In the Mapping page, to download data from a text file, select the location of the source text file and the delimiter type, and indicate the row at which to start transferring data. If your text file has header rows, start from row 2; otherwise, use row 1.

The Mapping page also shows you the runtime restriction applicable for your integrator. You can enter appropriate values here to restrict your query.

8. In the Review page, review the full details of the new document. Choose the Back button to change any of the information, or choose the Create Document button to continue.
9. The new document displays in the selected viewer you selected. Confirmation messages appear during this process.
10. Save the spreadsheet on your desktop.

See: Uploading Data Using Web ADI, page 2-17

Uploading Data using Web ADI

You can upload data to the Oracle applications database using a spreadsheet created in Web ADI. See: Data Upload Using Web ADI, page 2-7

To upload data from a spreadsheet using Web ADI:

1. If you have saved the spreadsheet on your local PC, locate and open the spreadsheet in Excel.
2. In the **Upl** column of the spreadsheet, each row in which you have changed data in any field is flagged for upload. As you change data in a field, the row is flagged for upload.
3. Select the Oracle menu on the Excel toolbar, and choose Upload.
4. If you are not already logged in to Oracle applications, a login page appears. Enter your user name and password, then choose the Login button.
5. In the Set Responsibility page, choose your responsibility, and then choose Select.
6. In the Upload Parameters page, choose the Parameters button. If you want to upload flagged rows only, choose the Flagged Rows option button. To upload all rows (for example, if uploading from a text file), choose the All Rows option button.
7. Choose the Proceed to Upload button, then choose the Upload button in the page that appears next. The upload takes place, and a series of upload messages is displayed, indicating the success or failure of the upload.
8. If the upload fails, return to the spreadsheet and correct any errors, then retry the upload. Further details of errors are available in the Messages column at the end of each row of the spreadsheet. If the upload is successful, the data is uploaded to the database. Confirmation messages indicate the success of the upload.

Note: Web ADI uploads all rows to the database if the data is error-free. If any errors occur, no rows are uploaded.

Uploading Data from Legacy Systems using Web ADI

Follow these steps to upload legacy data to your Oracle HRMS applications database using Web ADI.

To upload data from legacy systems using Web ADI:

System Administrator steps

1. Set up an integrator that enables both download and upload. See: Creating Integrators in Web ADI, page 2-25
2. Define one or more layouts for the integrator. See: Defining Layouts in Web ADI, page 2-28. Ensure that the layout contains all the mandatory fields you will need to create a valid record.

System Administrator or end-user steps

3. Ensure that the data to be transferred to the spreadsheet is in a text file in the appropriate format (see: Format of Text Files, page 2-7 for further details of file formats). Place the file in any directory you can access directly from your PC.
4. Define mappings between the columns in your text file and columns in the database. See: Defining Mappings in Web ADI, page 2-22

End-user steps

5. Download the empty spreadsheet. See: To create an empty spreadsheet using Web ADI, page 2-16
6. Check that the data has transferred correctly to the spreadsheet.
7. Upload the spreadsheet to the database, ensuring that you select the All Rows option button in the Parameters page. See: Uploading Data Using Web ADI, page 2-17

Defining Standalone Integrator Queries

To define a new query, you must use an existing standalone integrator.

To define a new query:

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the reporting box unchecked to download data.
3. Select HR Create Standalone Query integrator.
4. Select the default options for layout and content.
5. Specify the application short name that you used, when you created the standalone integrator, in the mapping window.
6. Specify the integrator username, if required.
7. Review the data entered in the review window, and select the Create Document button.
8. Specify the query restriction to use for your integrator in the SQL WHERE clause column.

Enter the SQL WHERE clause in the following format:

WHERE COL_NAME
LIKE \$PARAM\$.app:COL_NAME

col_name = any column in the view used by the integrator

app = application shortname

You can use any SQL conditional operator in the SQL WHERE clause. For example:

WHERE first_name
LIKE \$PARAM\$.per:first_name

Each instance of \$PARAM\$ is a bind variable, and you can use a maximum of 5 within a single WHERE clause.

9. Specify the name for each bind variable in the application parameter name column. For example: per:first_name.
10. Specify the type for each bind variable in the appropriate parameter type columns. For example: Varchar2. You can use the list of values to display the available options.
11. Specify the prompts for each bind variable. These prompts appear when you use the integrator (for example: first_name LIKE).
12. Upload your spreadsheet data to the database. Your integrator is now ready to use.

Using your integrator:

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select the standalone integrator you created earlier.
4. Select the default options for layout and content.
5. Enter values for each prompt for every bind variable that you defined in the mapping window. You can also change the session date, if required, to ensure that you obtain the latest data for your query.
6. Review the data entered in the review window, and select the Create Document button.
7. View your results in the displayed spreadsheet.

Maintaining Standalone Integrator Queries

When you have finished defining a standalone query you can use the HR Maintain Standalone Query integrator to update the query.

Using the Maintain Standalone Query integrator:

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select HR Maintain Standalone Query Integrator.
4. Select the default options for layout and content.

5. Enter the application short name, and optionally enter the integrator username.
6. Review the data entered in the review window, and select the Create Document button.
7. Modify the details in the displayed spreadsheet. Upload your changes.

Disabling Standalone Integrator Queries

You can use the HR Disable Standalone integrator to remove access to an integrator.

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select HR Disable Integrator integrator.
4. Select the default options for layout and content.
5. Enter the application short name, and optionally enter the integrator username.
6. Review the data entered in the review window, and select the Create Document button.
7. Select the integrator from the list displayed, and change the value in the Disable column to Yes.
8. Upload your changes.

Controlling Integrator Access

You now control access to integrators using form functions and menus. Before associating the form functions with integrators you need to define your form functions and menus.

Note: When you define your form function select Subfunction in the Type field.

Associating Form Functions with Integrators:

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data for updating.
3. Select HR Maintain Integrator Form Functions Integrator.
4. Enter the Application Short Name (for example, your custom application name). Optionally, enter the integrator name.
5. The displayed spreadsheet shows your selected custom integrators, and has a column for associating form functions. Enter the form function required for controlling access to the integrator.

Note: You can add additional form functions to the same integrator using the comma as a delimiter.

6. Upload your changes.

Defining responsibility restrictions:

Note: Oracle recommends that you control access to integrators using the form functions and menus instead of responsibility restrictions. Use of form functions and menus provides a greater degree of control over user access.

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select HR Create Integrator Responsibility Restrictions Integrator.
4. Select the default options for layout and content.
5. Review the data entered in the review window, and select the Create Document button.
6. Select Integrator Application Shortname from the list of values.
7. Select the Integrator User Name from the list of values.
8. Select your Responsibility Application Shortname from the list of values.
9. Select the responsibility name from the list of values.

Note: The responsibility you select must be applicable to the responsibility/application short name.

10. Upload your changes.

Maintaining Responsibility Restrictions:

You can update or remove any restrictions you created for your integrators using the HR Maintain Integrator Responsibility Restrictions integrator.

1. Select Create Document from the Web ADI menu.
2. Select a spreadsheet viewer. Leave the Reporting check box unselected to download data.
3. Select HR Maintain Integrator Responsibility Restrictions Integrator.
4. Select the default options for layout and content.
5. Enter the Application Shortname from the list of values, and optionally enter the integrator username.
6. Review the data entered in the review window, and select the Create Document button.
7. Update the Responsibility/Application Short Name and Responsibility Name columns in your spreadsheet. You can remove the values in these two columns to remove any restrictions.
8. Upload your changes.

Defining Mappings in Web ADI

You need to define mappings if you want to transfer data from a text file to a spreadsheet generated by Web ADI in order to upload it to the Oracle application database.

Define Mappings:

1. Choose Define Mapping from the Web ADI menu.
2. Select the integrator for which you want to create mappings.
3. Choose the Define Mappings button.
4. Enter a unique name for the mapping. Ensure that it clearly indicates the purpose of the mapping. For example, include the name of the text file and the API.
5. Enter a unique key. The key can contain only uppercase English characters, numerals, or the underscore character (_). The Web ADI application uses this key to identify the mapping.
6. If you are mapping from a text file, enter the number of columns you want to map. This does not have to be the same as the number of columns in the text file or the API. However, only those columns mapped are transferred from the text file.
7. In the Define Mapping page, select a column from the text file in the source column and a column from the API in the target column that you want to map it to.

Note: The columns you use to map the text file are *not* read directly from the text file, but are simply numbered columns from 1 to the number you specified in Step 6. To create the mapping, look at the text file and enter the number of the column you want to map to the API column.

8. When you have finished mapping, choose Apply.

Creating Mail Merge Letters using Web ADI

Follow these steps to create mail merge letters by downloading data from the Request Letters window using Web ADI.

To create mail merge letters:

System Administrator steps

1. If necessary, create a new view to retrieve data for the standard letter.

Note: Any views you use for letter requests must join to the PER_LETTER_REQUEST_LINES table, and must include the column LETTER_REQUEST_ID. For example, the following view returns a person's first and last names following a letter request:

```

create or replace view hrv_people_letters as
select
    letter_request_id,
    last_name,
    first_name
from
    per_letter_request_lines plrl,
    per_people_f pp
where
    pp.person_id = plrl.person_id
/

```

2. Create an integrator. Ensure that you create the integrator with a METADATA_TYPE of DOWNLOAD, and enter LETTER in the FORM_NAME column. See: Creating an Integrator in Web ADI, page 2-25

System Administrator or end-user steps

3. Define an integrator layout that includes all the columns you may want to include as fields in the standard letter. See: Defining a Layout in Web ADI, page 2-28
4. In the Letter window in Oracle HRMS, define a letter by entering a name and selecting assignment or enrollment statuses to associate with the letter.

See: To define a Standard Letter type, page 2-45

Important: The name you enter for the letter in this window *must* be the same as the name of the layout you created in Step 3.

You must select a concurrent program before you can save the letter type in this window, but you can select any concurrent program as this information is not used by Web ADI.

5. In the Request Letter window in Oracle HRMS, select the letter name and define a letter request, then save your work.
See: Requesting Letters, page 2-46
6. To create a data source for the creation of the template letter, in the Request Letter window, choose the Export Data icon on the toolbar, then download the data, selecting Word as the viewer. See: To download data to a document from an HRMS window, page 2-15
7. Save the Word document to a temporary directory.
8. Create the template letter in Word using the file you saved in Step 7 as your data source, so that you can select any required fields to include in the letter. Save the template letter to a temporary directory.
9. Upload the template Word document to the database. See: Managing Template Letters Using Web ADI, page 2-24
10. Use the Manage Layout Document Links page to create a link between the integrator and layout and the template letter. See: Creating Links between Template Letters and Layouts, page 2-25
11. Delete the temporary files you created in Steps 7 and 8 when you have uploaded the template to the database.

End-user steps

12. To create the Merge letter, in the Request Letter window, select a letter name, choose the Export Data icon on the toolbar, and download the data, selecting Word as the viewer. This time, as the template linked to the integrator and layout is available in the database, the data automatically creates a merge letter. See: To download data to a document from an HRMS window, page 2-15
13. Save the mail merge letter to your local PC if required.

Managing Template Letters Using Web ADI

You can upload template letters to the Oracle applications database, making them available for use by anyone creating a mail merge letter. You can also overwrite an existing template letter with an updated version, and delete unused letters from the database.

To Upload Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.
2. Choose the Upload New Document button. The Upload New Document page appears.
3. Select the template letter file from the temporary directory where you saved it on your PC (see Creating Mail Merge Letters, page 2-22), and select a document category to identify the type of letter (for example, whether it is a recruitment letter or an offer letter).

Note: To add document categories, use the Application Utilities Lookups window to edit the "HR ADI Document Type" extensible lookup type. See: Adding Lookup Types and Values, page 3-66

4. Choose Apply to upload the document.

To Overwrite Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.
2. Choose the Overwrite icon next to the name of the letter you want to update.
3. In the Overwrite Existing Document page, select the new version of the template letter file from the temporary directory where you saved it on your PC, then choose the Apply button. The new document is uploaded to the database, replacing the old one.

To Delete Template Letters:

1. Select Document Management from the Web ADI menu. The Document Management page appears.
2. Choose the Delete icon next to the name of the letter you want to delete.

The document is deleted from the database.

Note: You cannot delete documents if they are in use by the Oracle HRMS application. If a template letter is linked to a layout, you

must first unlink the document from the layout (see: Creating Links Between Template Letters and Layouts, page 2-25).

Creating Links between Template Letters and Layouts

You can create links between template letters in the Oracle HRMS database and the integrator and layout that you want to use to generate mail merges using the template.

To create links between template letters and layouts:

1. Select Manage Document Links from the Web ADI menu. The Web ADI Mail Merge page appears.
2. Select the integrator for the mail merge and choose Go.
3. A list of layouts for the integrator appears. Choose the Link icon next to the layout you want to link to your template letter. A list of documents that have been uploaded to the database is displayed (you can restrict the list of documents by using the Search feature).
4. Select the template letter you want to link to the layout, then choose the Select button. The template letter is associated with the document.

To remove links between template letters and layouts:

1. Select Manage Document Links from the Web ADI menu. The Web ADI Mail Merge page appears.
2. Select the integrator for the mail merge and choose Go.
3. A list of layouts for the integrator appears. Choose the Unlink icon next to the template letter you want to unlink from the layout. The link between the layout and the template letter is removed.

Configuring Web ADI

You can configure Web ADI to use your own integrators for downloading and uploading data between Oracle HRMS and spreadsheets or word processors.

To configure Web ADI:

System Administrator steps

1. Create new views if necessary.
2. Set up an integrator of the type required. See: Creating an Integrator in Web ADI, page 2-25
3. Define one or more layouts for the integrator. See: Defining a Layout in Web ADI, page 2-28

Creating Integrators in Web ADI

Creating integrators is a system administration step required to enable download or upload of data from and to windows for which no seeded integrator exists.

Web ADI has two types of integrators:

- Application Integrators

- Standalone Integrators

An Application Integrator links to a specific form. You typically use the form to download HRMS data, using some form restriction, modify the data, and then upload the data.

You use standalone integrators directly from the self-service menu function. These integrators allow you to create new data or download and update existing data. You can set up a query restriction to use at runtime. For Standalone Integrators the form name is GENERAL.

For a list of predefined integrators, see: Predefined Integrators, page 2-4

To create an integrator:

1. Select HR Create Document from the menu. The Settings page of the Web ADI wizard appears.
Caution: When moving between Web ADI pages, do not use your browser's Back or Forward buttons, as this causes information to be lost; instead, use the Back, Next and Cancel buttons displayed on the Web ADI page.
2. In the Settings page, select a spreadsheet viewer in the Viewer field.
3. Deselect the Reporting check box, as this integrator is used to upload data to the database.
4. In the Integrator page, select the seeded integrator "HR Integrator Setup".
5. In the Layout page, select the default layout "HR Integrator Setup".
6. In the Content page, select None.
7. In the Review page, you can see full details of the document that will be created. Choose the Back button if you want to change any of the information, or choose the Create Document button to continue.
8. A spreadsheet document is created, containing all the fields you need to enter to create your own integrator.

Download-only Integrators

If you are creating download-only integrators, including letter generation integrators, enter details in the following columns:

- METADATA_TYPE - select DOWNLOAD from the list of values.
- APPLICATION_SHORT_NAME - select the Application Short Name of your custom application from the list of values. The name appears from the FND_APPLICATION table.
- INTEGRATOR_USER_NAME - the name that appears when the end user selects the integrator in the Web ADI Create Document pages.
- VIEW_NAME - Web ADI uses a view to determine the tables and columns to download. Enter the name of the view you want to use to base the download on.
- FORM_NAME - the name of the window from which you want the integrator to be available to the user. Select GENERAL from the list of values, or select LETTER for a letter generation integrator.

If you are creating download-only and letter generation integrators, leave the remaining columns blank.

Download/Upload and Create Integrators

If you are creating integrators that allow both download and upload, or integrators that allow the creation of new data, enter details in the following columns:

- **METADATA_TYPE** - enter CREATE (to allow creation of new data) or UPDATE (to allow update of existing data)
- **APPLICATION_SHORT_NAME** - enter the Application Short Name of your custom application. The name appears from the FND_APPLICATION table.
- **INTEGRATOR_USER_NAME** - this is the name that appears when the end user selects the integrator in the Web ADI Create Document pages. Enter a user-friendly name.
- **VIEW_NAME** - Enter the name of the view you want to use to base the download on. If creating an empty spreadsheet for upload, leave this column blank.
- **FORM_NAME** - Enter the name of the window from which you want the integrator to be available to the user. To make the integrator available directly from the Web ADI menu, enter GENERAL in this field.
- **API_PACKAGE_NAME**. For upload integrators, whether CREATE or UPDATE, you must supply the name of the API that handles the upload of data.
- **API_PROCEDURE_NAME**. Specify the name of the API procedure to use to upload the data.
- **INTERFACE_USER_NAME**. This is a name that will appear to end users in any messages or prompts dealing with the interface (view or API). Enter a user-friendly name.
- **INTERFACE_PARAMETER_LIST_NAME**. This is a name that will appear to end users in any messages or prompts dealing with the interface (API) parameters. Enter a user-friendly name.
- **API_TYPE**. - Select PROCEDURE or FUNCTION from the available list of values, depending on the type of API you are using.
- **API_RETURN_TYPE** - For APIs of type FUNCTION, select the datatype of the value returned by the function from the available list of values, for example; VARCHAR2.

To upload the integrator:

Follow the steps for uploading a spreadsheet. See: Uploading Data using Web ADI, page 2-17

Controlling Access to the Integrator:

You must associate at least one form function with the integrator for granting user access. See: Controlling Integrator Access, page 2-20

Note: Your System Administrator must grant access for each new integrator to the Web ADI responsibility. Without this, you cannot create layouts for the integrators.

Defining Layouts in Web ADI

Each integrator must have at least one layout specifying the columns to appear in the spreadsheet.

To define a layout:

1. Choose Define Layout from the Web ADI menu. The Layout page appears.
2. Select the integrator for which you want to define the layout, and choose Go.
3. If the integrator already contains layouts, these are displayed. Choose the Define Layout button to define a new layout.

System Administrators should always create at least one default layout for an integrator. End users can optionally create their own layouts to restrict the fields displayed to those they are concerned with.

4. In the Define Layout page, enter a unique name for the layout. This appears whenever the user is required to select the layout, so should clearly indicate the purpose of the layout.

Note: When you create a layout for use in running mail merges, the layout name must exactly match the Letter Name in the Letter window of the HRMS application.

5. Enter a unique key. The key is used internally by the system to identify the mapping.
6. The Field List defaults to the complete list of columns available in the view or API. Choose Continue. In the next page, you select a subset of these fields to include in your layout.

Fields for a Letter Generation Layout

- Choose Select All, so that the user can choose from all fields when entering field codes and creating their template letter.

Fields for a Download Layout

- Choose the Select check box next to any fields you want to appear in the spreadsheet or word processing document.

Fields for a Download/Upload Layout

- Some mandatory fields are preselected. These are required to ensure that all data necessary to create a valid record is available when the data is uploaded. Select any optional fields you want to include in the spreadsheet. If any fields always contain the same values (for example, business group ID) you can select these as Header fields, and they appear in the header of the generated spreadsheet. Header values apply to all rows in the spreadsheet.

To save the layout:

1. Choose Apply to save the layout.

Converting ADE Styles to Web ADI Integrators

Follow these steps to convert your ADE styles to Web ADI integrators.

To convert ADE styles to Web ADI integrators:

1. Check that your HR: Data Exchange Directory profile option is set to point to a directory accessible from your Oracle applications database.
2. Using the Global Super HRMS Manager responsibility, navigate to the Submit Request window, and select the Upgrade from ADE to Web ADI concurrent process.
3. In the Parameters dialog box, enter the name of your ADE.INI file in the ADE ini file name field. This file must be located in the directory referred to in the HR: Data Exchange Directory profile option.
4. Submit the request.

Note: The request may complete with warning messages, because information that is required by Web ADI is not available in ADE. This is as expected, and can be corrected in Step 8.

5. Locate the output file from the concurrent process, which is placed in the same directory as the ADE.INI file. The output file has the name UPGDDMMYYHHMISS.CSV (where DDMMYYHHMISS represents the date and time the file was created).
6. Copy the output file to a local directory or shared network drive that you can access from your desktop.

You can now create integrators using this file as the content.

7. Use the Create Document menu to create an integrator spreadsheet containing all required columns (see: Creating Integrators, page 2-25), but when selecting the content for the spreadsheet, select Text File. In the Mapping page, select the UPGDDMMYYHHMISS.CSV file, and enter 1 in the Start Importing at Line Number field.

The process creates a spreadsheet containing the columns required to create an integrator, and transfers each ADE style from the text file into a separate row in the spreadsheet.

8. Missing information is shown in angle brackets in the appropriate column, for example, <<VIEWNAME>>. You must supply all missing values before you can upload the integrators.

The following columns may have information missing:

- VIEW_NAME. This information may be missing because some styles in ADE were defined without views, whereas Web ADI requires a view. Enter the name of the view to use to download the data.
 - APPLICATION SHORT NAME. Web ADI requires the short name of your custom application. Enter the application short name in each row.
9. When you have inserted all the missing information for each row, you can upload the spreadsheet, selecting All Rows in the Parameters page. See: Uploading Data using Web ADI, page 2-17. Each ADE style is converted to an integrator with the same name as the style.
 10. Set up a layout for each style. See: Defining Layouts, page 2-28. For letter generation integrators, ensure that the layout name you use is the same as that of the letter name in the HRMS application.

Additional Steps for Letter Generation Integrators:

1. Upload your existing template letters to the Oracle applications database. See: [Managing Template Letters](#), page 2-24
2. Link the layout to a template document. See: [Creating Links between Template Letters and Layouts](#), page 2-25

Letter Generation

Letter Generation Overview

There are three different methods provided to create standard letters:

- Online Using Web Applications Desktop Integrator (Web ADI), page 2-8
- Concurrent processing using Word Processors, page 2-31
- Concurrent processing using Oracle Reports, page 2-31

Which Method Should You Use?

Use the online method (Web ADI), if you want to generate and review your letters immediately.

Web ADI enables you to generate standard letters and reports by retrieving data and exporting it to a data file that is merged with a standard word processed document. The word processed document includes all the merge fields required to merge the data and the standard text for the letter. Web ADI is fully compatible with Microsoft Word 6.

You can use Web ADI to generate standard letters for recruitment or enrollment by performing a mail merge from the Request Letter window in your application.

Alternatively, you can use the concurrent processing method to set up your standard letters. With concurrent processing, you generate and review your letters without interrupting other work you perform at your computer. You can control when a concurrent process runs and schedule long-running processes to run at times when the system is lightly loaded. Another advantage of using concurrent processing is that you do not need to have Windows 95 or 98, Excel or Lotus 123 installed.

Concurrent Processing

There are two methods of using concurrent processing to set up your standard letters:

- Using word processors
- Using Oracle Reports

Using Word Processors

You can use any word processor to produce standard letters from Oracle HRMS. If you use a word processor, you can submit a concurrent request in the Letter Request window to generate the mail merge file. When the concurrent request is complete, you can use your word processor's mail merge facilities to create the merged letters.

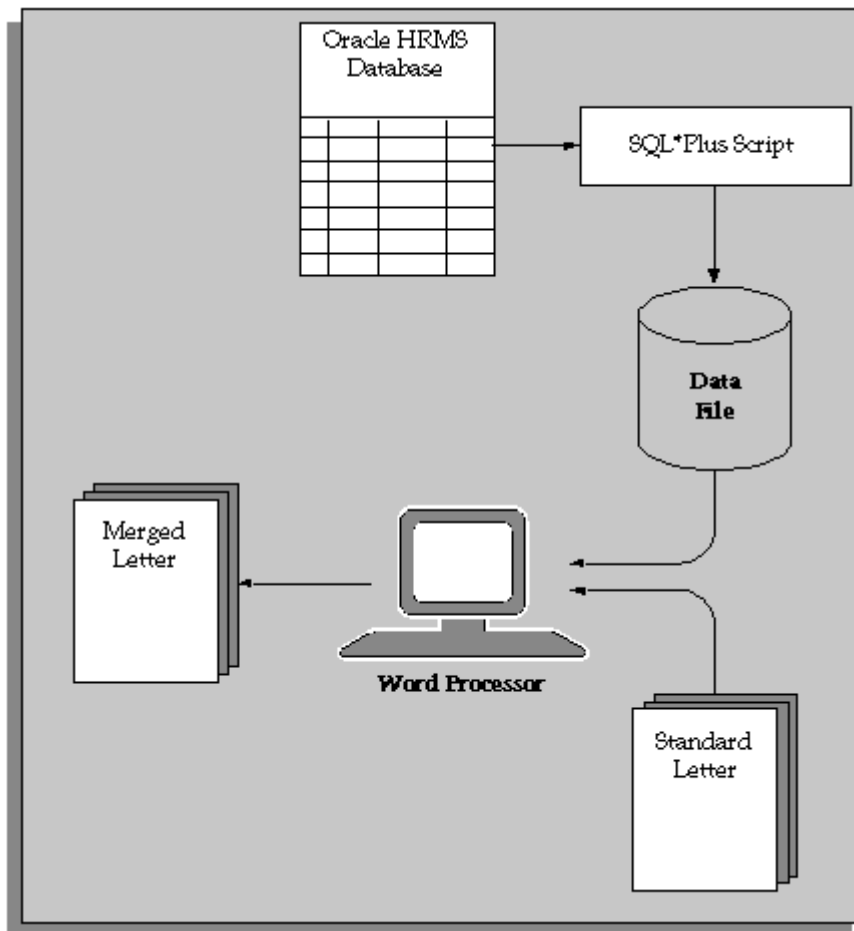
To create standard letters using a word processor, you need to extract the data you want to include in the letters from the Oracle HRMS database. To do this, create a program, such as a SQL*Plus script, to extract the data, which is then stored in a data file. You also write skeleton standard letters using your word processor.

Note: Oracle HRMS supplies SQL*Plus script templates for use with MultiMate, WordPerfect and Microsoft Word. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

Each time you run your SQL*Plus script, it extracts data to the data file. You then use the mail merge features of your word processor to merge this data with the skeleton standard letters you previously prepared. This merging process creates the actual letters that you send out to students and applicants.

An overview of creating standard letters using a word processor is shown in the following figure.

Using a Word Processor



If you want to set up standard letters using the concurrent processing method with MultiMate, WordPerfect Microsoft Word, see: Method 1 - Concurrent Processing, page 2-.

If you use Microsoft Word as your word processor, not only can you use the concurrent processing method to produce your standard letters, but you can also generate letters online using Oracle Web Applications Desktop Integrator (Web ADI)

See: Letter Generation Using Web ADI page , page 2-8

Using Oracle Reports

As an alternative to using a word processor to produce standard letters, you can use the Standard Letter and Label features of Oracle Reports. Use this method if you do not want to use word processors to print your letters (or if you do not have word processors).

See: Linking the Report with a Letter, page 2-45

Example Files

PERWPOUK Template

The template SQL*Plus script for mail merge letters for Microsoft Word is PERWPOUK.sql. See: Writing a SQL*Plus Script for Microsoft Word, page 2-42

The following section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

```
WHenever SQLERROR EXIT FAILURE ROLLBACK
REM Define the MS Word mail merge record separator
DEFINE ch="'"
REM Define the column width for returning query results
COLUMN L1 FORMAT A2000
SET PAUSE OFF
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
SET PAGESIZE 0
```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session. The &2 argument contains the current SQL*Forms session date. You should produce this section exactly as you see it when you define your mail merge file.

```
REM Insert session row
insert into fnd_sessions(session_id ,effective_date)
select   userenv('SESSIONID'),
         to_date('&2','DD-MON-YYYY')
from     sys.dual
/
```

The following section has two functions:

1. To set the mail merge header linesize. This is dependent on the character length of all the mail merge items you want to use. In the example, the header linesize equates approximately to 220 characters.
2. To enable the spooling of the SQL results. You must remove the REM keyword from the line that spools output to a file for the Microsoft Mailmerge. If you use concurrent processing to generate the data source file, Concurrent Manager creates the output file.

```
REM Set length of the header
SET LINESIZE 220
REM Create the mail merge 'header' record for MS Word
REM Note: SPOOL command commented out for concurrent manager.
REM      PC based solution required the SPOOL command.
REM spool perwpouk.txt
```

The following section defines the mail merge header information. These are the mail merge fields you integrate with your word processed letter. Each mail merge field is

delimited by the pre-defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the LINESIZE value you specified above.

```
select  'address_line1'          ||&ch||
        'address_line2'        ||&ch||
        'address_line3'        ||&ch||
        'town_or_city'          ||&ch||
        'country'               ||&ch||
        'postal_code'           ||&ch||
        'applicant_title'       ||&ch||
        'applicant_last_name'   ||&ch||
        'position_name'         ||&ch||
        'organization_name'     ||&ch||
        'grade_name'            ||&ch||
        'projected_hire_date'   ||&ch||
        'recruiter_title'       ||&ch||
        'recruiter_last_name'   ||&ch
from    sys.dual
/
```

After selecting your mail merge header information, you must re-set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 lengt
h
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter. The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row/record has ended. The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```

REM Mail merge interview query
select  rpad(
        nvl(pa.address_line1,' ')
        ||&ch||
        nvl(pa.address_line2,' ')
        ||&ch||
        nvl(pa.address_line3,' ')
        ||&ch||
        nvl(pa.town_or_city,' ')
        ||&ch||
        nvl(ft.territory_short_name, ' ')
        ||&ch||
        nvl(pa.postal_code,' ')
        ||&ch||
        nvl(hl1.meaning, ' ')
        ||&ch||
        nvl(pp1.last_name, ' ')
        ||&ch||
        nvl(pos.name, ' ')
        ||&ch||
        pou.name
        ||&ch||
        nvl(pg.name, ' ')
        ||&ch||
        nvl(to_char(pappl.projected_hire_date,
                    'fmDay fmddth "of" fmMonth YYYY'), ' ')
)      ||&ch||
        nvl(hl2.meaning, ' ')
        ||&ch||
        nvl(pp2.last_name, ' ')
        ||&ch,
        2000, '#') L1

from    per_addresses          pa,
        fnd_territories       ft,
        hr_lookups            hl1,
        hr_lookups            hl2,
        hr_all_organization_units pou,
        per_positions          pos,
        per_grades             pg,
        per_applications       pappl,
        per_all_people         pp1,
        per_all_people         pp2,
        per_all_assignments    pasg1,
        per_letter_request_lines plr

```

```

where      plr.letter_request_id      = &1
and        pp1.person_id              = plr.person_id
and        pa.primary_flag            (+) = 'Y'
and        pa.person_id              (+) = pp1.person_id
and        ft.territory_code          (+) = pa.country
and        hl1.lookup_code            (+) = pp1.title
and        hl1.lookup_type            (+) = 'TITLE'
and        pasg1.assignment_id        (+) = plr.assignment_i
d
and        pos.position_id            (+) = pasg1.position_i
d
and        pou.organization_id        (+) = pasg1.organizati
on_id
and        pg.grade_id                (+) = pasg1.grade_id
and        pappl.application_id        (+) = pasg1.applicatio
n_id
and        pp2.person_id              (+) = pasg1.recruiter_
id
and        hl2.lookup_code            (+) = pp2.title
and        hl2.lookup_type            (+) = 'TITLE'
/
REM Note: SPOOL command commented out for concurrent manager.
REM      PC based solution required the SPOOL command.
REM spool off

```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```

REM update the letter request_status from PENDING to COMPLETE
update per_letter_requests plr
set   plr.request_status      = 'COMPLETE'
where plr.letter_request_id   = &1
and   plr.request_status      = 'PENDING'
/

```

The following section deletes the row inserted into FND_SESSIONS.

```

REM delete the session row created
delete from fnd_sessions fs
where fs.session_id = userenv('sessionid')
and   fs.effective_date = to_date('&2','DD-MON-YYYY')
/

```

The following section commits the changes and exits the SQL*Plus session.

```

REM commit the changes
commit
/
exit

```

PERWPWUK Template

The template SQL*Plus script for mail merge letters for MultiMate or WordPerfect is PERWPWUK.sql. See: Writing a SQL*Plus script for MultiMate or WordPerfect, page 2-41

The following section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

```
REM
DEFINE line_size=80
DEFINE field_size= &line_size-1
DEFINE ch="'"'"'"
SET PAGESIZE 0
SET LINESIZE &line_size
BREAK ON L1 SKIP PAGE
COLUMN L1 FORMAT A&line_size
COLUMN L2 FORMAT A&line_size
COLUMN L3 FORMAT A&line_size
COLUMN L4 FORMAT A&line_size
COLUMN L5 FORMAT A&line_size
COLUMN L6 FORMAT A&line_size
COLUMN L7 FORMAT A&line_size
COLUMN L8 FORMAT A&line_size
COLUMN L9 FORMAT A&line_size
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. The &2 argument contains the current SQL*Forms session date. You should produce this section exactly as you see it when you define your mail merge file.

```
insert into fnd_sessions
(session_id ,effective_date)
select  userenv('SESSIONID')
,       to_date('&2','DD-MON-YYYY')
from    sys.dual
/
```

After selecting your mail merge header information, you must re-set the LINESIZE to the maximum to VARCHAR2 size which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 length
h
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter. The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```

select nvl(t.meaning||' '||p.first_name||' '||p.last_name, ' ')||
&ch||
  nvl(a.address_line1, ' ') ||&ch||
  nvl(a.address_line2, ' ') ||&ch||
  nvl(a.address_line3, ' ') ||&ch||
  nvl(a.town_or_city, ' ') ||&ch||
  nvl(a.region_1, ' ') ||&ch||
  nvl(a.postal_code, ' ') ||&ch||
  nvl(t.meaning||' '||p.last_name, ' ')
from   per_addresses a,
       per_people p,
       per_letter_request_lines s,
       hr_lookups t
where  a.person_id (+) = p.person_id
and    p.person_id = s.person_id
and    p.title = t.lookup_code (+)
and    t.lookup_type (+) = 'TITLE'
and    s.letter_request_id = &1
/

```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```

update per_letter_requests r
set    r.request_status    = 'COMPLETE'
where  r.letter_request_id = &1
and    r.request_status    = 'PENDING'
/

```

The following section commits the changes and exits the SQL*Plus session.

```

commit
/exit
/

```

OTA SQL*Plus Script

Example SQL mail merge file. See: Writing a SQL*Plus Script for MultiMate or WordPerfect, page 2-41 and Writing a SQL*Plus Script for Microsoft Word, page 2-42

The template to produce confirmation letters is OTA.sql.

The following section defines the required SQL*Plus environment settings. You should produce this section exactly as you see it when you define your mail merge file.

```

WHENEVER SQLERROR EXIT FAILURE ROLLBACK
REM Define the MS Word mail merge record separator
DEFINE ch="'"
REM Define the column width for returning query results
COLUMN L1 FORMAT A2000
SET PAUSE OFF
SET FEEDBACK OFF
SET RECSEP OFF
SET HEADING OFF
SET VERIFY OFF
SET TERMOUT OFF
SET PAGESIZE 0

```

The following section creates a row in the Application Object Library table (AOL) FND_SESSIONS. This enables the datetrack security views to be accessed for the session. The &2 argument contains the current SQL*Forms session date. You should produce this section exactly as you see it when you define your mail merge file.

```
REM Insert session row
insert into fnd_sessions(session_id ,effective_date)
select   userenv('SESSIONID'),
         to_date('&2','DD-MON-YYYY')
from     sys.dual
/
```

The following section has two functions:

1. To set the mail merge header line size. This is dependent on the character length of all the mail merge items you want to use. In the example, the header line size equates approximately to 220 characters.
2. To enable the spooling of the SQL results. The spool file should match the name of the SQL file you are writing, but with a text file extension. 2.2

```
REM Set length of the header
SET LINESIZE 200
REM Create the mail merge 'header' record for MS Word
REM Note: SPOOL command commented out for concurrent manager.
REM      PC based solution required the SPOOL command.
RWM spool xxxxx.txt
```

The following section defines the mail merge header information. These are the mail merge fields you integrate with your word processed letter. Each mail merge field is delimited by the pre-defined &ch character. Ensure that the field size does not exceed 40 characters and that the field name does not include white spaces. Do not forget that the length in characters of this selected row from sys.dual is the line size value you specified above.

```
select   'student_title'           ||&ch||
         'student_first_name'      ||&ch||
         'student_last_name'       ||&ch||
         'event_name'              ||&ch||
         'event_code'              ||&ch||
         'event_end_date'          ||&ch
from     sys.dual
/
```

After selecting your mail merge header information, you must re-set the line size to the maximum VARCHAR2 size, which is 2000.

```
REM re-initialise the linesize to the maximum 2000 varchar2 length
h
SET LINESIZE 2000
```

The following section is the main SQL*Plus query that generates the mail merge field information. Note that the columns are merged together using the &ch character as the field delimiter. The RPAD function pads out the row of information with # for all white spaces. Without this function, mail merge cannot distinguish when a row/record has ended. The SQL*Plus query in this example is generated from letter requests. Therefore the &1 argument is used to identify which letter_request_id is being generated.

```

REM Mail merge confirmation query
select rpad(
  initcap(nvl(d.delegate_title_meaning,' '))           ||&ch||
    nvl(d.delegate_first_name,' ')                   ||&ch||
    nvl(d.delegate_last_name,' ')                     ||&ch||
    nvl(v.description,' ')                             ||&ch||
    nvl(d.event_activity_version_name,' ')             ||&ch||
    to_char(d.course_end_date, 'DD fmMonth YYYY')      ||&ch,
    2000, '#')                                         L1
  from ota_delegate_bookings_v                        d,
  ota_activity_versions v,
  per_letter_request_lines plr
 where plr.letter_request_id = &1
 and   (plr.ota_booking_id = d.booking_id
 or    plr.ota_event_id = d.event_id)
 and   d.activity_version_id = v.activity_versi
on_id
/

```

```

REM Note: SPOOL command commented out for concurrent manager.
REM      PC based solution required the SPOOL command.
REM spool off

```

The following section updates the letter request from Pending to Complete (as the example is for letter requests).

```

REM Update the letter request_status from PENDING to COMPLETE
update per_letter_requests plr
set plr.request_status = 'COMPLETE'
where plr.letter_request_id = &1
and plr.request_status = 'PENDING'
/

```

The following section deletes the row inserted into FND_SESSIONS.

```

REM delete the session row created
delete from fnd_sessions fs
where fs.session_id = userenv('sessionid')
and fs.effective_date = to_date('&2','DD-MON-YYYY')
/

```

The following section commits the changes and exits the SQL*Plus session

```

REM commit the changes
commit
/
exit
/

```

Planning Standard Letter Requirements

Before creating standard letters, you need to identify several things.

To plan standard letter requirements:

1. Identify the database information to include in the letters.

You need to identify the select statements to provide you with the data as the *content* of your letters. Oracle HRMS supplies you with SQL*Plus scripts as templates to help you do this.

2. Identify the text that you want to include as the *body* of your letters.
3. Decide whether to associate your standard letters with student enrollment or applicant assignment statuses.
4. Identify which statuses you want to trigger your standard letters (if you do want to link your standard letters to student enrollment or applicant assignment statuses).

For example, do you want to link your standard enrollment confirmation letter to the status Placed so that the letter is triggered when you set a student's enrollment status to Placed? Do you want to link your standard rejection letter to the status Rejected so that it is triggered when an applicant's assignment status is set to Rejected?

Writing a SQL*Plus Script for MultiMate or WordPerfect

Oracle HRMS supplies you with SQL*Plus scripts as templates for extracting database information for standard letters. You can copy the SQL*Plus script templates and modify them to create the standard letters you require.

The template scripts Oracle HRMS provides are:

Scripts	Purpose	Used By
PERWPMUK.sql	Example UK SQL*Plus script for MultiMate	HR
PERWPMUS.sql	Example US SQL*Plus script for MultiMate	HR
PERWPWUK.sql	Example US SQL*Plus script for WordPerfect	HR
PERWPWUS.sql	Example US SQL*Plus script for WordPerfect	HR

One of the template SQL*Plus scripts (PERWPWUK.sql) is provided as an example. See: PERWPWUK Template, page 2-33

Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file. See: OTA SQL*Plus Script, page 2-33

To write a SQL*Plus script for MultiMate or WordPerfect:

1. Copy the appropriate SQL*Plus script from the server side sql directory of the HR product tree (consult your installation guide for details).
2. Edit (or write) a SQL*Plus script to select data from the database in a format your word processor can read and that is compatible with the standard letter.
3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Writing a SQL*Plus Script for Microsoft Word

Oracle HRMS supplies four SQL*Plus script templates.

You can run the scripts on the server side and make them accessible to other users across the network, or you must copy them to a directory which is accessible from the PC, such as a network drive.

The template scripts that Oracle HRMS provides are:

Scripts	Purpose	Used By
PERWPOUS.sql	Example US Offer letter SQL mail merge file	HR
PERWPOUK.sql	Example UK Offer letter SQL mail merge file	HR
PERWPIUS.sql	Example US Interview letter SQL mail merge file	HR
PERWPIUK.sql	Example UK Interview letter SQL mail merge file	HR

One of the template SQL*Plus scripts is provided as an example. See: Template SQL*Plus Script PERWPOUK, page 2-33

Oracle Training Administration does not provide template scripts, but we provide an example of a Confirmation letter SQL mail merge file. See: OTA SQL*Plus Script, page 2-33

To write a SQL*Plus script for Microsoft Word:

1. Copy the SQL*Plus scripts from the server side sql directory of the HR product tree. (Consult your installation guide for details).
2. Edit (or write) a SQL*Plus script to select data from the database in a format your word processor can read and is compatible with the standard letter.
3. Save the file with the name PERWP*** (or OTAWP*** for OTA).

You must use this prefix for the system to recognize it as a type of letter. See your Oracle Applications installation server guides for details of where the concurrent manager places the files.

Registering the SQL*Plus Script

Register your SQL*Plus program with Oracle HRMS. You register your program so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP***). You must use this prefix for the system to recognize it as a type of letter.

You use the Concurrent Programs window to register your program (using a system administrator responsibility).

Linking the SQL*Plus Script With a Letter

You need to link your SQL*Plus script with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

Define your standard letter types in the Letter window.

To define a standard letter type:

1. Enter a name for the letter in the Name field.
2. Select the Concurrent Program Name assigned by your System Administrator to the SQL*Plus script.

For Oracle Human Resources:

3. Select one or more applicant assignment statuses to create letter requests automatically for applicants, and check the Enabled box.

When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the request.

For Oracle Training Administration:

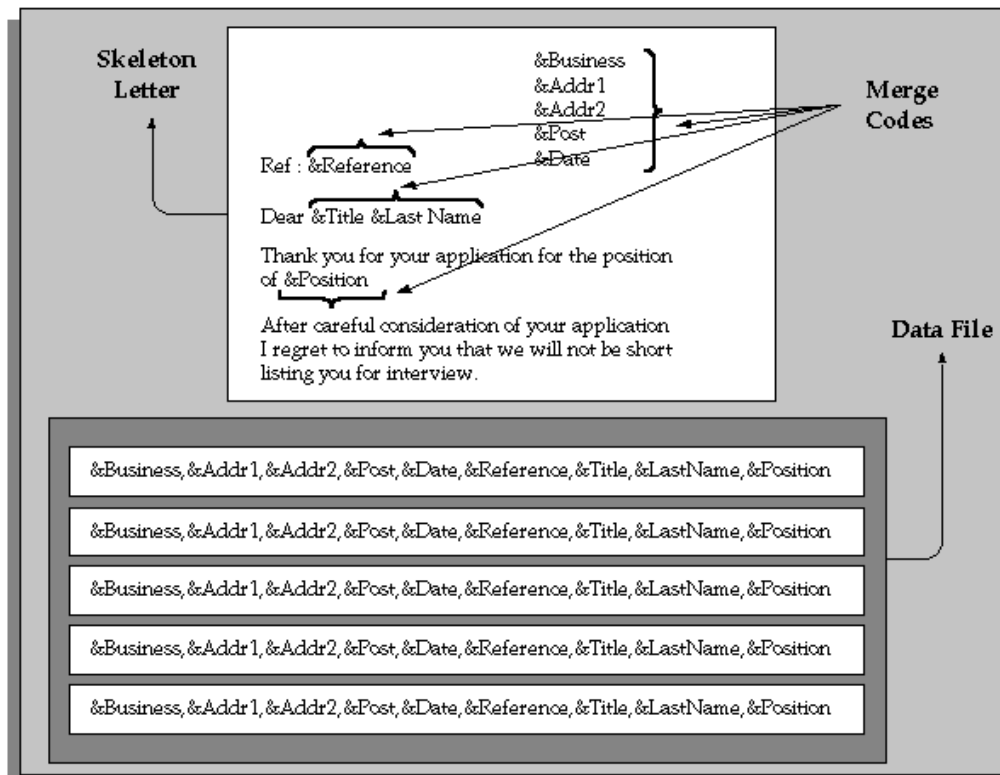
4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

Writing a Skeleton Letter

Write a skeleton letter using your word processor. Include the appropriate merge codes from the data source for the word processor you are using.

Merging Data with Standard Letters



The mail merge feature of any word processor enables you to merge text from the data file you create into a standard letter. Each line in the data file contains the text to merge into one standard letter for one recipient.

Within the program, you can format the data and include the characters that are recognized as separators by your word processor.

A standard letter comprises standard text with a number of embedded variables in it. When you print the letter, the variables are replaced with specific items of data, such as name and address details for different people.

Merging the Data File with the Standard Letter

When the concurrent manager has finished processing a letter request, you can merge the data in the Data File with your skeleton letters.

To merge the data file with the standard letter:

1. Merge the data in the Data File with your skeleton letters to create your standard letters. The merging of text and data files is normally carried out using the mail merge features of your word processor.

If you do not have access to the directory where the Data File resides (consult your installation guide for details of the location Concurrent Manager places the file), you need to transfer the mail merge files created by the concurrent process to your word processor before you can merge the data file with the skeleton letters.

2. If you are using a word processor to merge the data file, you need to save the merged letters you generate.

If you do not save the merged letters, when you exit the word processor you lose the letters. You do not lose the data file or the skeleton letter, however.

Linking the Report With a Letter

You need to link your report with a letter and one or more statuses. In Oracle Human Resources, you can link one or more applicant assignment statuses with each recruitment letter. A request for the letter is then created automatically when an applicant is given an associated assignment status. In Oracle Training Administration, you can link one or more enrollment statuses with each enrollment letter. A request for the letter is then created automatically when an enrollment is given an associated status.

For example, you can link your standard recruitment rejection letter to the status Rejected so that the letter is triggered when you set an applicant's assignment status to Rejected.

Define your standard letter types in the Letter window.

To define a standard letter type:

1. Enter a name for the letter in the Name field.
2. Select the concurrent program name assigned by your system administrator to the report.

For Oracle Human Resources:

3. Select one or more applicant assignment statuses to create letter requests automatically for applicants, and check the Enabled box.

When an applicant is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the applicant is added to the list of people to receive the letter when you submit the request.

For Oracle Training Administration:

4. Select one or more enrollment statuses to create letter requests automatically for enrollments, and check the Enabled box.

When an enrollment is given one of these statuses, a pending request for this letter type is created automatically. If a pending letter request already exists, the enrollment is added to the list of people to receive the letter when you submit the request.

Writing and Registering the Report

You need to write and register the report.

To write and register the report:

1. Identify which data you want to extract from the database. Write your skeleton letter text and Select statements specifying the data to be extracted from the Oracle database.
2. Register your report with Oracle HRMS. You register your report so that you can run it as a concurrent program. Name the file PERWP*** (or OTAWP*** for OTA). You must use this prefix for the system to recognize it.

You use the Concurrent Programs window to register your report (using a system administrator responsibility).

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

Requesting Letters/Running the Report

When you, or other users, set the status for an applicant or enrollment that triggers your standard letters, Oracle HRMS creates a letter request automatically, with the status of Pending. It also adds the applicant's or student's name to the request. You can view the pending request and names through the Request Letter window.

Then, when you change the letter request from Pending to Requested, Oracle HRMS runs the report or SQL*Plus script for this type of letter.

Depending on the requirements of your enterprise, you can generate letter requests for every organization within your enterprise or you can generate separate letter requests for each vacancy you define. If you want to generate separate letter requests by a specific vacancy you must select Yes for the HR: Restrict Letter by Vacancy Name or Event profile.

The advantages of restricting the generation of letters to a specific vacancy is that you can process letters for one organization without affecting another organization within your enterprise.

See: User Profiles, page 1-46

You can add further names to the list manually, if required. For example, you might have a last minute acknowledgement letter to send.

You can also create manual letter requests. You do this by entering the status of Pending yourself, then entering all the recipients of the letter before changing the status of the letter to Requested.

To submit an automatic letter request:

1. Query the letter you require in the Letter Name field.
2. Ensure that the method is Automatic.
3. Select the vacancy in the Vacancy Name field.

Note: You must set the HR: Restrict Letter by Vacancy or Event profile to Yes to enable this field.

4. Move to the Requested For block to query the applicants, events or students that have been entered automatically on this request, according to their status. You can add further names manually.
5. Update the status from Pending to Requested.
6. Save your changes.

A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

7. You can query the request ID in the Concurrent Requests window and monitor its progress.

Note: Consult your installation guide for details of the location Concurrent Manager places the output or data file.

To create a manual letter request:

1. Select the Letter Name for the letter type you want to request.
2. Ensure that the method is Manual.
3. Select the vacancy in the Vacancy Name field.

Note: You must set the HR: Restrict Letter by Vacancy or Event profile to Yes to enable this field.

4. Leave the status of the request as Pending.
5. Save the changes.

Adding the Names

6. Select the names to add:

- Select employees or applicants (for Oracle Human Resources) to receive the letter in the Requested For region.

The Assignment field displays the organization to which the person is assigned. You can view the other components of the assignment by choosing List of Values from the Edit menu.

- Select events or students or both (for Oracle Training Administration) in the Requested For region.

This depends on how the letter has been set up on your system. For example, an enrollment confirmation letter might be defined so that it is sent to all students with the status Confirmed who are enrolled on the event selected in the Requested For region.

7. Save the changes.

Changing the Status

8. Update the status from Pending to Requested.
9. Save the changes.

A concurrent request ID number appears in the Concurrent Request field. When the Concurrent Manager has processed the request it changes the status to Completed.

10. You can query the request ID in the Concurrent Requests window and monitor its progress.

Note: Consult your installation guide for details of the location Concurrent Manager places the output file.

Performing the Next Step:

If your letters are produced by Oracle Reports, they are ready for printing. If you use your word processor's mail merge facility, you are ready to merge the data. See: Merging the Data File With the Standard Letter, page 2-44

Extending Oracle HRMS

Extend Oracle HRMS Overview

This section describes how you can extend Oracle HRMS to better meet your enterprise's needs.

There are many ways you can configure Oracle HRMS to meet the needs of your business processes:

- Linking windows together in a task flow to streamline data entry and processing
- Designing your own windows to create user or task-specific windows
- Restricting data access on windows to provide security and confidentiality

You can configure Oracle HRMS using one or any combination of these.

Before configuring any part of Oracle HRMS, it is advisable to plan ahead and decide which parts of the system you want to configure. For example, if you know that your users typically perform a task in a certain way, you can design windows to help them enter information more efficiently. You can also link windows together to help users move from one window to the next. If necessary, you can also restrict what information appears in lists of values and restrict access to certain types of information.

Key Concepts

This section describes some of the tools available to configure Oracle HRMS for your enterprise.

Alerts

Alerts enable you to inform, remind, and confirm information on your personal information, your direct reports, and your workforce. The alert triggers an email notification of an impending action, task, or change to information. For example, you can set up an alert to remind you when a new hire is due to start work.

See: Oracle HRMS Predefined Alerts, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Flexfields

You can add data fields called flexfields to windows to hold any additional information you require. You can add:

- *Key flexfields* to configure some of the most important parts of the system, including the names of jobs, positions and grades, details of payroll cost allocation, and analysis information for employees and other people.
- *Descriptive flexfields* to add fields to windows to record additional information.
- *Extra Information Types* to set up multiple categories of information for the most important entities in Oracle HRMS. For example, you might use EITs to add details to assignment records in special circumstances, such as information about a leave of absence or extra information about a temporary assignment to a project.

Protected Flexfields are predefined and protected flexfields supplied with Oracle HRMS. There are two key protected flexfields and three descriptive protected flexfields. Your localization team defines these flexfields to meet the specific legislative and reporting needs of your country.

User-Defined Tables

You can set up user tables to provide matrixes of valid values that vary, such as age, or job, or number of years service. You can access these values from formulas, or your own forms or reports. The GET_TABLE_VALUE function is supplied for use in your formulas. Certain legislations include predefined user tables, for example, to hold values for payroll calculations.

Lookups

Lookups provide lists of valid values on certain fields throughout the system. For many lookups you can add your own values and change the predefined values. Lookups not only ensure that all users use the same terminology, but also speed up data entry.

CUSTOM Library Events

You can use CUSTOM Library Events to configure the logic that is executed at defined points within a window. Generic events are available to all Oracle Applications and Product Specific Events are also available to help you to apply business rules specific to Oracle HRMS.

APIs (called Application Programmatic Interfaces)

Oracle HRMS provides a set of PL/SQL packaged procedures and functions that together provide an open interface to the database.

Task Flows

You often need to use more than one window to complete many tasks. Oracle HRMS enables you to link these windows together using a *task flow*. Users can choose a button to bring up each window in turn without returning to the menu. For example, to hire an employee, you typically go from the People window, to the Address window, to the Special Information window, to the Assignment window, and so on. Task flows speed up processes and reduce data entry errors.

See: Task Flow, page 3-170

Restricting Information

You can restrict the data available on certain windows. For example, you could restrict the information on a People Management template to applicants only or employees only.

Restricting the type of information available on a window is useful as a security measure. For example, you can create versions of Compensation windows to show only compensation types available to the logged-in user.

You can restrict information on People Management templates using the People Management Configurator. See: People Management Configurator, page 3-186

You can restrict data using a wider range of criteria on the People Management form and a number of other forms using CustomForm.

See: Windows You Can Configure Using CustomForm, page 3-242

Configuration Template Forms

You can design forms to help users to perform their tasks quickly and efficiently. Predefined templates can serve as guidelines to design forms for the core People Management processes in your enterprise.

A template form can consist of up to three separate windows:

- A **Find window** to enable queries to be performed
- A **Summary window** to display people and assignment information
- A **Maintenance window** to enable the entry and update of information

You can design the new windows to complete a whole process such as hiring an applicant. For example, users can use the Maintenance window to enter and maintain an applicant's details and the Find window to find groups of applicants to work with. You add the new template forms to the menu so that users can access them from the navigator in the same way as all the other windows.

See: People Management Templates, page 3-188

You configure the predefined templates to create your own windows using the People Management Configurator tool.

See: People Management Configurator, page 3-186

Currencies

You need to define the formats for displaying currency amounts. If required, you can use multiple currencies for entering information about employee compensation and benefits and you can also record your payment methods to employees in different currencies. You must enable at least one currency as the default currency for all information related to money in your system. This default is known as the Base Currency for your Business Group.

Extend Oracle HRMS

You can extend Oracle HRMS to meet the needs of your enterprise.

You can configure Oracle HRMS by designing windows to match your specific business processes. Configuring windows enables your users to perform their tasks more efficiently.

How can you hold additional information?

You can add data fields to windows to hold any additional information you require. Flexfields are flexible fields that enable you to do this.

Then, when you click in a flexfield you have set up, a window opens, displaying segments into which you can enter data.

You can also set up your own tables to hold data such as wage codes, shift differentials, or the amounts of certain deductions

How can you ensure the same terminology is used and speed up data entry?

Oracle provides lists of values called *lookups* for certain items of information. Lookups ensure that all users use the same terminology, making it easier to inquire and report on information. Lookups also speed up data entry because you can enter just enough to identify the value, and the system completes the entry.

Can you configure windows to match the business needs of your enterprise?

Yes. For the core employee management information you can use the People Management Configurator tool to design your own windows to match the tasks performed in your enterprise. A set of predefined *templates* are provided as examples of how you can design new windows.

How is security affected by configuring windows?

Any windows that you configure behave in the same way as existing windows. Security is set by the user's security profile option and responsibility. However, you can configure the Find results window to enable users to see information for people outside of their security profile. They cannot change this information.

In addition, you can create windows that:

- Restrict the list of values on certain fields or limit access to certain types of information
- Use workflow so that any data changes must be approved before the changes are applied to the database. This applies to the windows that are based on templates.

Can you restrict the amount of data that users have to enter?

Yes. If you design windows using the templates, they offer greater flexibility for defaulting values in fields. You can also hide fields where you require no input from users, and you can restrict the list of values on other fields that are displayed in the windows.

What happens to the online help when you design new windows?

Online help is provided for the windows that have been created using the predefined templates. If you make changes to the windows or create new windows, you can edit the online help to make it match the new way of performing the tasks.

Can you define the formats for currency?

Yes. You can define the formats for displaying currency amounts.

Flexfields

Flexfields

Flexfields are flexible fields that enable you to configure and extend Oracle Applications by adding fields to windows. There are two types of flexfield:

- *Key flexfields* enable you to define additional information you want to record in existing fields.
- *Descriptive flexfields* enable you to add fields to windows to record additional information.

Extra Information Types (EITs) are a type of descriptive flexfield that enable you to set up unlimited amounts of extra information for eight of the most important entities in Oracle HRMS.

You can set up each flexfield to contain a number of segments, which act like separate fields.

When a user clicks in a flexfield you have set up, a window opens, displaying the segments that you have defined. For each segment, you can define:

- Its prompt
- The type of data it can contain
- The values a user can enter

You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the sequence in which the segments appear.

User Definable Key Flexfields

In Oracle HRMS there are eight user definable key flexfields:

- Job
- Position
- Grade
- Competence
- People Group
- Personal Analysis
- Cost Allocation
- Collective Agreement Grades

The Personal Analysis and Collective Agreement Grades key flexfields can have an unlimited number of structures. All other flexfields can have only one structure each.

You can define up to 30 segments for each structure in all key flexfields except for the Collective Agreement Grades key flexfield. This can have up to 20 segments for each structure.

How Oracle HRMS Uses Key Flexfields

Oracle HRMS uses key flexfields in a number of distinct ways:

Unique Identifiers

The Job, Position, Grade Name, and Competence flexfields enable you to create a unique name, which is a combination of separate components or segments. You can use these flexfields when you are defining the work structures and competencies that exist in your enterprise.

Tip: When you are defining your requirements for these key flexfields you should consider the following points:

- The task of defining the segment combinations is normally restricted to one or two users only. Therefore, you may not need to use value sets, or cross validation rule options to control the values that can be entered.
 - The names that users see are made up of a combination of segment values. The segment values are displayed, not the meanings.
 - Avoid segments containing information that may change regularly. There is no history of changes to the combinations you create. For example, do not define minimum and maximum values for grades as segments of the Grade flexfield.

Analysis Information

The People Group and Personal Analysis flexfields enable you to add key information to records of employee assignments and people. You can use the individual segments of these flexfields to identify or report on specific groups of people.

Payroll Costing

The Cost Allocation key flexfield is used to collect and to accumulate costs associated with running a payroll.

Collective Agreement Grade Structures

The Collective Agreement Grades key flexfield enables you to create an unlimited number of grade structures. You use the individual segments of each grade structure to record the grade factors that are defined within a collective agreement.

Once the grade structure is recorded you can link it to a collective agreement and enter the required factor values for each reference grade in the Agreement Grades window.

What You Must Set Up

The key flexfields are central to Oracle HRMS, therefore you must create certain definitions before you can set up your business group.

Position and Grade Key Flexfields

- You can only define one structure per business group for each of these flexfields.
- Use of these flexfields is optional, but almost all Oracle HRMS installations use the Grade flexfield. Positions are used most often in large, highly structured enterprises, such as those in the areas of government, education, and health care.
- You must define a structure name for these two flexfields before you can define a business group.
- You associate these structures with a business group in the Business Group Information window, which opens from the Organization window.

- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the Grade or Position key flexfield definitions. See: Creating Key Flexfield Database Items, page 3-20

Job Key Flexfields

- Use of this flexfield is optional.
- You must define at least one structure name for the job key flexfield before you can define a business group.
- You associate this structure with a business group in the Business Group Information window, which opens from the Organization window. This defines the key flexfield that is used for the Default HR Job Group.
- You can create a number of different structures for the job key flexfield and then associate them with user defined job groups.
- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the Job key flexfield definitions. See: Creating Key Flexfield Database Items, page 3-20

Competence Key Flexfield

- You must define a structure name for this flexfield before you can define a business group.
- You can only define one structure per business group for this flexfield.
- You associate this structure with a business group in the Business Group Information window, which opens from the Organization window. This defines the key flexfield that is used when creating competencies specific to the business group.
- You can create an additional key flexfield that can be used to create global competencies that are available across all business groups. You can, however, use the same key flexfield you have defined for the business group if you want. You define this key flexfield in the HR: Global Competence Flex Structure profile option.
- You must specify one of the segments as the Default Attribute using the flexfield qualifier. You must also attach the Others flexfield qualifier to all other segments in the structure.
- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the Competence key flexfield definitions. See: Creating Key Flexfield Database Items, page 3-20

People Group Key Flexfield

- You can only define one structure per business group for this flexfield.
- You do not create separate combinations of segments for the People Group flexfield. You enter values for each employee as part of the employee assignment.
- You must define a structure name for this flexfield before you can define a business group.
- You must define at least one segment for the People Group flexfield in order to be able to use the Assignment window.

- It is essential to run the Create Key Flexfield DB Items process whenever you create or change the People Group key flexfield definition. See: Creating Key Flexfield Database Items, page 3-20

Personal Analysis Key Flexfield

- You can create any number of structures per business group for this flexfield. Each one represents a Special Information Type.
- You do not need to define any structures for the Personal Analysis flexfield before you can use Oracle HRMS.
- You link each structure to a business group in the Special Information Types window while you are logged on to that business group.
- You can configure windows to restrict access to specific Information Types, such as medical or disciplinary information.

Cost Allocation Key Flexfield

- You can only define one structure per business group for this flexfield.
- You can control the levels at which users can enter cost information by using the flexfield qualifiers.
- You must define a structure name for this flexfield before you can define a business group.
- A number of windows in Oracle HRMS check for the existence of a valid flexfield structure for Cost Allocation. You must define at least one segment for your Cost Allocation flexfield.

Collective Agreement Grades (CAGR) Key Flexfield

- You can create any number of structures for this flexfield.
Important: If you are using the Italian legislation, do not create new structures for this flexfield. You must use the predefined structure, IT_CAGR, and you must not make changes to it. Otherwise, you may be unable to enter collective agreement grades for your assignments.
- You can define up to 20 segments within each structure. Each segment refers to a grade factor that is available as part of the grade structure.
- You must check the Allow Dynamic Inserts check box when defining the structure of this flexfield.
- You do not need to define any structures for the Collective Agreement Grades flexfield before you can use Oracle HRMS.
- You link each structure to a collective agreement in the Agreement Grades window. The reference grades entered in this window are recorded against this combination.
- You can enter values for each of the defined grade factors as part of each reference grade in the Agreement Grades window.

Flexfields: Open Key Window Profile Option

The way in which key flexfield windows open is controlled by the Flexfields:Open Key Window profile option. If this option is set to Yes, the flexfield window automatically pops open when the user navigates to the field. If it is set to No, users can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L. The default is Yes.

User Definable Descriptive Flexfields

The predefined fields in Oracle HRMS windows are designed to meet your core information requirements. However, like all enterprises, you may have special requirements that are best met by fields that you design yourself. Oracle HRMS provides a flexible mechanism called *descriptive flexfields* to enable you to add fields to windows.

All window blocks in which you can enter information contain a user definable descriptive flexfield. You decide in which blocks you want to record additional information. Each user definable descriptive flexfield has 20 segments that you can define. After you define a descriptive flexfield, Oracle HRMS treats the segments as part of the window.

The following figure illustrates the distinctive appearance of descriptive flexfields. When users click in a flexfield that you have set up, or choose Edit Field from the Edit menu, a window opens, displaying up to 20 *segments* that you have defined.



The way in which descriptive flexfield windows open is controlled by the Flexfields:Open Descr Window profile option. If this option is set to Yes, the flexfield window automatically pops open when the user navigates to the field. If it is set to No, users can open the flexfield by choosing Edit Field from the Edit menu or pressing CTRL+L. The default is Yes.

Segments

For each segment, you can define:

- Its prompt
- The type of data it can contain
- The values a user can enter

You can provide a list or range of valid values. You also control the size and display characteristics of each segment and the order in which the segments appear.

Types of Descriptive Flexfield Segments

You can define two types of descriptive flexfield segments:

- Global segments, which always appear in the window.
- Context-sensitive segments, that appear only when a defined context exists. You can prompt the user to provide the context, or you can provide the context automatically from a reference field in the same block.

For example, a segment holding information about an employee's disability might appear only when the Disabled field is checked.

Important: Some descriptive flexfields appear in more than one window. For example, the *Additional Evaluation Details* flexfield appears in the Job Evaluation window and the Position Evaluation window.

Check all of the windows that use a descriptive flexfield before you define any of the segments. This is especially important if you intend to make the flexfield context sensitive to another field. You must ensure that the reference field is present in all of the windows that use the flexfield.

See: Descriptive Flexfield List, page 3-10 for a full list of user definable descriptive flexfields in Oracle HRMS.

Descriptive Flexfield List

The following table lists all the user definable descriptive flexfields in Oracle HRMS.

Descriptive Flexfield Title	Window Title	Database Items
Additional Absence Details	Absence Detail, View Absence History	ABSENCES_<SEGMENT_ NAME>
Additional Absence Type Details	Absence Attendance Type	ABSENCE_TYPES_ <SEGMENT_NAME>
Additional Address Details	Address, Applicant Entry Contact	PERSON_ADDRESSES_ <SEGMENT_NAME>
Additional Application Details	Applicant Entry, Application, Terminate Applicant	APPLICATIONS_ <SEGMENT_NAME>
Additional Appraisal Details		
Additional Appraisal Template Details		
Additional Assessment Group Details		
Additional Assessment Type Details		
Additional Assessment Details	Medical Assessment	
Additional Assignment Details	Applicant Entry, Application, Assignment, Assignment History	ASSIGNMENTS_ <SEGMENT_NAME>

Descriptive Flexfield Title	Window Title	Database Items
Additional Assignment Status Details	Secondary Statuses	
Additional Balance Type Details	Balance (Oracle Payroll only)	
Additional Benefit Contribution Details	Benefit Contributions (US only)	
Additional Booking Details	Applicant Interview, Book Events, Employee Review, Event Bookings	
Additional Budget Details	Budget	
Additional Budget Values Details		
Additional Budget Version Details	Budget	
Additional Calendar Information	Budgetary Calendar (Oracle Payroll)	
Additional Candidate Information	Election	
Additional Career Path Details	Career Path Names	
Additional Checklist Item Details		
Additional COBRA Benefit Details	COBRA Benefits (US only)	
Additional COBRA Coverage Details	COBRA Coverage (US only)	
Additional COBRA Payment Details	COBRA Payment (US only)	
Additional COBRA Status Details	COBRA Status (US only)	
Additional Collective Agreement Details	Collective Agreements	
Additional Coll. Agreed Grades Details	Agreement Grades	
Additional Competence Details		

Descriptive Flexfield Title	Window Title	Database Items
Additional Competence Element Details		
Additional Constituency Details	Election	
Additional Contact Relationship Details	Contact	CONTACTS_<SEGMENT_NAME>
Additional Contract Details	Contract	
Additional Delivery Method Details		
Additional Deployment Factor Details	Work Choices, and Position Transaction (Work Choices tabbed region)	
Additional Disability Information	Disabilities	
Additional Election Details	Election	
Additional Element Entry Information	Adjust Balance (Oracle Payroll only), Element Entries, View Element Entry History for Employee	
Additional Element Link Information	Element Link (Oracle Payroll)	
Additional Element Type Details	Element (Oracle Payroll)	
Additional Establishment Att Details		
Additional Establishment Details		
Additional Evaluation Details	Job, Position	
Additional Event Details	Applicant Interview, Employee Review, Event Bookings	EVENTS_<SEGMENT_NAME>
Additional Grade Details	Grade	GRADES_<SEGMENT_NAME>
Additional Hierarchy Details	Generic Hierarchy	

Descriptive Flexfield Title	Window Title	Database Items
Additional Incident Details	Work Incident	
Additional Job Details	Job	JOBS_<SEGMENT_NAME>
Additional Letter Details	Letter	
Additional Location Details	Location	
Additional Node Details	Generic Hierarchy	
Additional Objectives Details		
Additional Organization Information	Organization	
Additional Organization Payment Method Details	Organizational Payment Method (Oracle Payroll)	
Additional Organization Structure Details	Organization Hierarchy	
Additional Organization Unit Details	Organization	ORGANIZATION_<SEGMENT_NAME>
Additional Participants Details		
Additional Pay Scale Information	Pay Scale	
Additional Pay Rate Details	Grade Rate, Scale Rate	
Additional Payroll Action Details (Oracle Payroll)		
Additional Payroll Details	Payroll	PAYROLLS_<SEGMENT_NAME>
Additional Performance Ratings Details		
Additional Period Information	Budgetary Calendar, Period Dates (Payroll form)	
Additional Period of Placement Details	End Placement	
Additional Period Type Information	Period Types	
Additional Person Analysis Details	Special Information, List People By Special Information	

Descriptive Flexfield Title	Window Title	Database Items
Additional Personal Details	Applicant Entry, Contact, People, People Folder	PEOPLE_<SEGMENT_ NAME>
Additional PPM Details	Personal Payment Method	
Add'l Person Type Usage Details	Person Type Usage	
Additional Position Details	Position, Find Positions (Mass Move form)	POSITION_<SEGMENT_ NAME>
Additional Position Structure Details	Position Hierarchy	
Additional Previous Employer Details	Previous Employment	
Additional Previous Job Details	Previous Employment	
Additional Previous Job Usage Details	Previous Job	
Additional Qualification Details		
Additional Qualification Types		
Additional Rating Level Details		
Additional Rating Scale Details		
Additional Recruitment Activity Details	Recruitment Activity	RECRUITMENT_ACTIVIT IES_<SEGMENT_NAME>
Additional Requirement Details	Job, Position	
Additional Requisition Details	Requisition and Vacancy	
Additional Role Details	Supplementary Roles	
Additional Salary Administration Details	Salary Administration	
Additional Salary Basis Details	Salary Basis	

Descriptive Flexfield Title	Window Title	Database Items
Additional Standard Holiday Absence Details		
Additional Subjects Taken Details		
Additional Succession Planning Details		
Additional Telephone Number Details	Phone Numbers	
Additional Template Details	People Management Configurator (Template Object)	
Additional Vacancy Details	Requisition and Vacancy	
Additional Valid Grade Details	Job, Position	
Additional Version Details	Generic Hierarchy	
Additional Year Information	Budgetary Calendar	
Assignment Extra Information	Extra Assignment Information	
Extra Job Info Details	Extra Job Information	
Extra Location Info Details	Extra Location Information	
Extra Person Info Details	Extra Person Information	
Extra Position Info Details		
Extra Previous Job Details	Previous Employment	
Further Candidate Information	Election	
Further Election Information	Election	
Proposal Component Addl Info		
Review Addl Information		
Salary Survey Additional Information		
Survey Line Addnl Information		
Survey Mapping Add Info		

Descriptive Flexfields and Address Styles

Oracle HRMS supplies two predefined descriptive flexfields to hold address information in different styles for different countries. These are:

- the **Personal Address Information descriptive flexfield**: This holds the address information of your employee or applicant.
- the **Location Address descriptive flexfield**: This holds the address information of your locations.

Oracle HRMS holds the addresses of people and locations separately to enable you to record different information for tax reporting.

You can use these descriptive flexfields to add new address styles or to change the styles included in Oracle HRMS.

Important: If you change the predefined styles, your changes are overwritten when you upgrade Oracle HRMS. If you add new styles, your changes may be overwritten if new startup data contains address styles for these countries.

Address Styles

Address styles vary between countries, so Oracle HRMS provides descriptive flexfields that use *context-sensitive* segments to hold each line of an address. The Address Styles Flexfields table below details the title of the flexfield, its location and where it is used.

Address Style Flexfields in Oracle HRMS

Title	Table Name	Window Title
Personal Address Information	PER_ADDRESSES	Address, Applicant Entry
Location Address	HR_LOCATIONS	Location, Organization

The available address styles are defined as the contexts for these flexfields. There are two types of address style:

- International
- Local

Address styles are provided as startup data in these flexfields. If you require additional address styles, you need to define a new context and segments.

International Address Style

This style provides basic validation of address data. Oracle HRMS provides international address styles for many countries. This style can be used for both location and personal addresses. International address styles are named *territory_code_GLB*. For example, the Australian international address style is AU_GLB.

Territory codes can be found in the FND_TERRITORIES table.

Local Address Style

This style provides full validation of address data and is set up by a localization team. Where a local address style exists, it can usually be used for both location and personal addresses. Local address styles are named *territory_code*. For example, the Australian local address style is AU.

Where a local address style exists and the Business Group uses the legislation code for that country, the local address style is displayed as the default in the appropriate address entry window. Where no local address exists, the international style is the default.

US and Canadian users: the local address style for the US or Canada is only available when you have Vertex geocodes data installed.

Developer Flexfields

Oracle HRMS supplies developer key flexfields and developer descriptive flexfields. Your localization team has defined these flexfields, as required, to meet the specific legislative and reporting needs of your country.

The protected developer key flexfields are the Soft Coded Legislation key flexfield and the Bank Details key flexfield.

Of the developer descriptive flexfields, all except six are protected and cannot be amended. The remaining six have Extra Information Types that you can use to configure your application.

See: Extra Information Types (EITs), page 3-23

The following table lists the developer descriptive flexfields, including EITs.

Developer Descriptive Flexfields in Oracle HRMS

Title	Table Name	Window Title
Extra Job Information (EIT)		
Extra Location Information (EIT)		
Extra Person Information (EIT)		
Extra Position Information (EIT)		
Extra Previous Job Information	PER_PREVIOUS_JOB_EXTRA_INFO	Previous Employment
Further Absence Information (Additional Absence Detail Information)	PER_ABSENCE_ATTENDANCES	Absence Detail
Further Assignment Information (EIT)		
Further Budget Values Details		

Title	Table Name	Window Title
Further Candidate Information	PER_ELECTION_CANDIDATES	Election
Further Canvas Properties	HR_CANVAS_PROPERTIES_B	People Management Configurator (Canvas Object)
Further Collective Agreement Information	PER_COLLECTIVE_AGREEMENTS	Collective Agreements
Further Competence Element Information	PER_COMPETENCE_ELEMENTS	
Further Competence Element Outcomes Information	PER_COMP_ELEMENT_OUTCOMES	
Further Competence Information	PER_COMPETENCES	Competencies
Further Competence Outcomes Information	PER_COMPETENCE_OUTCOMES	
Further Contact Relationship Information	PER_CONTACT_RELATIONSHIPS	Contacts
Further Contract Information (Datetracked)	PER_CONTRACTS_F	Contracts
Further Contribution History Information		
Further Disability Information (Datetracked)	PER_DISABILITIES_F	Disabilities
Further Election Information	PER_ELECTIONS	Election
Further Element Information (Datetracked)	PAY_ELEMENT_TYPES_F	Element
Further Element Entry Information (Datetracked)	PAY_ELEMENT_ENTRIES_F	Element Entry
Further Establishment Information	PER_ESTABLISHMENTS	Schools/Colleges
Further Form Properties	HR_FORM_PROPERTIES	People Management Configurator (Form Object)
Further Item Properties	HR_ITEM_PROPERTIES	People Management Configurator (Item Object)
Further Job Information	PER_JOBS	Job
Further Medical Assessment Information	PER_MEDICAL_ASSESSMENTS	Medical Assessment

Title	Table Name	Window Title
Further Payment Method Information (Datetracked)	PAY_ORG_PAYMENT_METHODS_F	Organizational Payment Method
Further Payroll Information (Datetracked)	PAY_ALL_PAYROLLS_F	Payroll
Further Period Details	PER_TIME_PERIODS	Payroll Periods
Further Period of Service Information (Add'l Periods of Service Information)	PER_PERIOD_OF_SERVICE	Terminate
Further Person Information (Datetracked)	PER_PEOPLE_F	People, Applicant Entry
Further Previous Employer Information	PER_PREVIOUS_EMPLOYERS	Previous Employment
Further Previous Job Information	PER_PREVIOUS_EMPLOYERS	Previous Employment
Further Previous Job Usage Information	PER_PREVIOUS_JOB_USAGES	Previous Job
Further Qualification Information	PER_QUALIFICATIONS	Qualifications
Further Role Information	PER_ROLES	Supplementary Roles
Further Subject Information	PER_SUBJECTS_TAKEN	Qualifications
Further Tab Page Properties	HR_TAB_PAGE_PROPERTIES_B	People Management Configurator (Tab Page Object)
Further Template Properties		People Management Configurator
Further Window Properties	HR_WINDOW_PROPERTIES_B	People Management Configurator (Window Object)
Further Work Incident Information	PER_WORK_INCIDENTS	Work Incidents
Org Developer DF		
State Tax Limit Rate Information		
Statutory Transaction Information		
Tax Signup Developer DF		

Your localization team determines which of these flexfields are required for your legislation, and what segments they should contain. The legislation of your business group determines which developer descriptive flexfields are displayed. This means that if your enterprise uses multiple business groups that have different legislations, different developer descriptive flexfields are displayed for business groups of each legislation.

Caution: Do not attempt to alter the definitions of the protected flexfields. These definitions are a fundamental part of Oracle HRMS. Any change to them may lead to errors in the operating of the system.

It is possible that Oracle HRMS will use other segments of these flexfields in the future. Therefore, do not add segments to any protected flexfield, as this may affect your ability to upgrade your system in the future.

Soft Coded Legislation Key Flexfield

This key flexfield holds legislation-specific information. The legislation of your business group determines the flexfield structure that you see.

Each localization team defines a flexfield structure, if required, which enables you to enter information specific to your legislation at the employee or contingent worker assignment level.

Bank Details Key Flexfield

This flexfield holds legislation-specific bank account information. The legislation of your business group determines the flexfield structure that you see. Each localization team defines a flexfield structure that allows you to record the bank account information relevant to your legislation. You enter this information in the Organizational Payment Method window and Personal Payment Method window.

Creating Key Flexfield Database Items

The *Create Key Flexfield DB Items* process turns data in key flexfields into database items that Oracle FastFormula can access. It is essential to run this process whenever you create or change the Grade, Job, Position, or People Group key flexfield definitions.

Submit the process from the Submit Requests window.

To create key flexfield database items:

1. Run the *Create Key Flexfield DB Items* process.

Run this process whenever you create or change these key flexfield definitions.

See: Running Reports and Programs, *Oracle Applications User's Guide*

Creating Descriptive Flexfield Database Items

You can use descriptive flexfield segments in QuickPaint reports and formulas if there are database items for these segments.

See Descriptive Flexfield List, page 3-10 for a list of flexfields for which you can create database items.

Submit the process from the Submit Requests window.

To create descriptive flexfield database items:

1. Run the *Create Descriptive Flexfield DB Items* process.

Run this process whenever you create or change these descriptive flexfield definitions.

See: Running Reports and Programs, *Oracle Applications User's Guide*

Note: The process can only create database items for global segments. It does not create database items for context-sensitive segments.

Changing Default National Address Styles

National address styles, both international and local, are held and configured in the Personal Address Information and the Location Address descriptive flexfields. You can configure these styles using the Descriptive Flexfield Segments window.

You cannot construct any flexfield segment value sets with:

- Profile options, \$PROFILE\$
- Previous segment values, \$FLEX\$
- Block.field references
- Security rules

Note: You must ensure the Personal_Address or Location_Address protected flag is off.

To change the address style for any country, redefine those segments you do not want to use. Then define new segments to record your own information.

To alter an existing address style:

1. Enter Oracle Human Resources in the application field.
2. Enter Personal Address Information or Location Address in the title field as appropriate.
3. Run the query.
4. Uncheck the Freeze Flexfield Definition check box.

Note: Read the warning.

5. Select the address style for your country.

Note: Both international and local address styles are included in the list of context field values.

6. Click the segments button.

This opens a new window with the segment and value set information for the selected address style.

7. Update the segments.

Note: You must make the Country segment mandatory. Do not change the validation on any segment as this may invalidate existing data.

8. Save your work, and open the Descriptive Flexfield Segments window. Make sure any new segments are enabled, and displayed.
9. Check the Freeze Flexfield Definition check box.
10. Choose the Compile button.

When compilation is complete, exit your current login session, then log in again to see your updated styles.

To add an address style:

1. Enter Oracle Human Resources in the application field.
2. Enter Personal Address Information or Location Address in the title field as appropriate.
3. Run the query.
4. Uncheck the Freeze Flexfield Definition check box.

Note: Read the warning.

5. Choose New from the File menu.
6. Enter the country code in the code and name fields.
7. Enter a description and select the Segments button.
8. Define the segments.

Note: You can only use the columns provided by Oracle HR for your segments.

9. Save your work.

Note: Make sure any new segments are enabled. You can choose whether segments are displayed or not.

10. Check the Freeze Flexfield Definition check box.
11. Choose the Compile button.

When compilation is complete, exit your current login session. Then log in again to see your updated styles.

Extra Information Types

Extra Information Types (EITs)

Extra Information Types are defined using descriptive flexfields. You can set up any number of different EITs for:

- Location
- Job
- Position
- Person
- Assignment
- Organization
- Element types
- Previous Job
- Contacts
- Role

Note: EITs for Organization are different because you can define which organization classification the EIT is available for.

For each EIT you can define up to 30 fully validated segments of information (or 20 for organizations).

Note: Oracle HRMS provides some predefined EITs. You may add your own information types, but you must **not** change the definitions of the delivered EITs.

For information about predefined EITs for positions, see: *Position Extra Information Types, Oracle HRMS Enterprise and Workforce Management Guide*

Unlike the usual descriptive flexfields, EITs are child entities with separate tables to hold the information you enter. This means that you can have multiple instances of an EIT for each main record. When you define the EIT, you can specify whether you want to allow multiple instances. With the exception of organizations, EIT data is viewed and entered in a separate window which you can task flow.

The windows for all the EITs have the common look and feel of all the descriptive flexfield windows. This means that you can use your new EITs as soon as you save your definitions. Since flexfield definitions are preserved through upgrades, EITs do not require expensive recoding of configured forms with each new release.

Key Flexfield Combinations

EITs are very similar to Special Information Types (SITs). For analyzing people's attributes and job requirements, Oracle enables you to choose whether to set up extra or special information types, or both. Both types of information use flexfields to define the structure and validation of their segments.

However, SITs are stored in a key flexfield combination table where the combination of segments must be unique - a feature of all key flexfields. EITs are stored in a descriptive flexfield table where the combination of segment values do not need to form a unique key.

This means that EITs have performance advantages in large scale, or global implementations where you may want to transfer large volumes of information between separate installations.

Dates and EITs

EITs are not datetracked. Even if the parent entity, for example People, is datetracked, the extra information is not. However, if you want to track changes to specific EITs you can define date segments for Start and End Dates and use multiple rows of the EIT to track changes.

EITs and Security

Both special and extra information types use CustomForm and task flow security to restrict access to information. This means that you can restrict access to the information types as part of a specific user process. For example, in a "Transfer to the UK" process you might want to enter additional UK specific information. You could design your user process to include a "UK Info" window as part of the task flow and restrict the window to display only the UK information type.

To provide extra security for EITs, you must associate each EIT with the responsibilities that should have access to the information. For example, you might record details of an extended leave of absence in an EIT for an assignment and provide access only to managers who need to know.

Restricting Access to Extra Information

You can restrict access to EITs using a combination of the following:

- **Menus and task flows :** Without the EIT window a user cannot see or change any extra information for the entity.
- **CustomForm and task flows:** This restricts EITs to specific user processes.
For example, at the person level you might define EITs to hold medical details, security information and information required for working in other countries. In this situation you might want to create two task flows, the first with a button for entering only medical details and the second with a button for entering the other types of extra information
- **Responsibility level security:** For each responsibility, you must select the EITs to be viewed. CustomForm and task flow restrictions provide additional security. You might specify that a responsibility can access an EIT, but users of this responsibility will not be able to view the extra information unless they have access to a window that displays it.

Note: This security does not apply to extra information on organizations.

Example Script for Registering Extra Information Types (EITs)

If you have created new organization EITs, you must create a SQL script to insert a row for each EIT into the relevant information type table. This is known as registering

your information type. When you create your script, you can use the sample script provided as a guide.

Note: If you have created non-organization EITs, you use the concurrent process Register Extra Information Types (EITs) instead.

See: Register Extra Information Types (EITs), page 3-31

Example Script to Register EITs

```
WHenever SQLERROR EXIT FAILURE ROLLBACK
REM /* $Header: example.sql $ */
REM =====
REM SQL Script File Name : example.sql
REM Description : This sql script inserts information
REM 1) HR_ORG_INFORMATION_TYPES
REM 2) HR_ORG_INFO_TYPES_BY_CLASS
REM =====
WHERE not exists (SELECT 1
--1) Insert into HR_ORG_INFORMATION_TYPES:---
-- Note different parameter value for single and multi-row
-- Note different parameters for this EIT
INSERT INTO HR_ORG_INFORMATION_TYPES
(ORG_INFORMATION_TYPE
,DESCRIPTION
,DESTINATION
,DISPLAYED_ORG_INFORMATION_TYPE
,FND_APPLICATION_ID
,LEGISLATION_CODE
,NAVIGATION_METHOD
)
SELECT
'<Organization EIT Name>'
,'<Description>'
,NULL
,'<Display value on the Organization form>'
,NULL
,'<legislation code US/GB/etc>'
,'<GM for multi-row - GS for single>'
FROM sys.dual
WHERE not exists (SELECT 1
FROM HR_ORG_INFORMATION_TYPES
WHERE ORG_INFORMATION_TYPE = '<Organization EIT Name>');
INSERT INTO HR_ORG_INFO_TYPES_BY_CLASS
(ORG_CLASSIFICATION
,ORG_INFORMATION_TYPE
,MANDATORY FLAG)
SELECT
'<Check lookup value for classification HR_BG for Business Group>'
,'<Organization EIT Name>'
,'N'
FROM sys.dual
WHERE not exists (SELECT 1
FROM HR_ORG_INFO_TYPES_BY_CLASS
WHERE ORG_INFORMATION_TYPE = '<Organization EIT Name>'
and
ORG_CLASSIFICATION = '< HR_BG for Business Group>');
/
COMMIT;
EXIT;
```

Setting Up Extra Information Types (Excluding Organization EITs)

The following steps explain how to set up Extra Information Types (EITs) to use in Oracle HRMS.

Note: EITs for organizations are set up differently. See: Setting Up Extra Information Types for an Organization Classification, page 3-28

1. In the Descriptive Flexfield Segments window, select the relevant descriptive flexfield by title (for example, Extra Job Information). The descriptive flexfields available are:
 - Extra Location Information (30 Segments)
 - Extra Job Information (30 Segments)
 - Extra Position Information (30 Segments)
 - Extra Person Information (30 Segments)
 - Extra Element Information (30 Segments)
 - Further Assignment Information (30 Segments)
 - Previous Extra Job Information (30 Segments)
 - Contact Extra Information (30 Segments)
2. Unprotect the relevant extra information type using the Register Descriptive Flexfield window. You must do this before you can query the flexfield in the Descriptive Flexfield window.
3. Create a new record in the Context Field Values region of the Descriptive Flexfield window and enter the name of your new Information Type in the Code field. As these are context-sensitive descriptive flexfields, enter INFORMATION_TYPE in the Reference Field.
4. Enter the segment values and compile in the same way as a standard descriptive flexfield.

See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

Important: There are some predefined EITs in Oracle HRMS. These definitions are a fundamental part of your Oracle HRMS installation and any change to them may lead to errors in the operation of the system. Do not attempt to alter the definitions of these developer flexfields or to add other segments to them. It is possible that Oracle will use other segments of these flexfields in the future. Any changes you make may affect your ability to upgrade your system in the future.

For US Federal users: Do not prefix EIT definitions with GHR_US. This prefix is reserved for the predelivered US Federal definitions.

5. Reset the protection in the Register Descriptive Flexfield window so the flexfield remains a protected descriptive flexfield.
6. Run the Register Extra Information Types (EITs) concurrent program to insert a row for each EIT into the relevant Information Type table. The following table lists the tables for each EIT.

Extra Information Type Tables

EIT	Table
Location	HR_LOCATION_INFO_TYPES
Job	PER_JOB_INFO_TYPES
Position	PER_POSITION_INFO_TYPES
Person	PER_PEOPLE_INFO_TYPES
Assignment	PER_ASSIGNMENT_INFO_TYPES
Previous Job	PER_PREV_JOB_INFO_TYPES
Contact	PER_CONTACT_INFO_TYPES

Important: Oracle applications use a standard 2- or 3-character product prefix followed by an underscore to name the predefined EITs. To avoid current and future naming conflicts, you should adopt a different naming convention for your Extra Information Types; for example CUSTOM_EXPAT_TAXABILITY.

7. Use the Information Types Security window to set up responsibility level access to EITs.
See: Setting Up Extra Information Types Against a Responsibility, page 3-30
Your EIT will now be available anyone using the specified responsibilities. If you want to set up further security using CustomForm and task flow, continue with the next step.
8. Use the Form Customization window to restrict access to specific EITs within the appropriate windows.
See: Configuring a Window using CustomForm, page 3-247
9. Use the Define Task Flow Nodes window to define new nodes for any CustomForm restrictions you have set up.
See: Defining Task Flow Nodes, page 3-177
10. Use the Define Task Flow window, or use Oracle Workflow, to define and change task flows to include any new nodes you have set up.
See: Creating Task Flows Using Forms, page 3-176
See: Creating Task Flows Using Workflow, page 3-180

Setting Up Extra Information Types for an Organization Classification

To add Extra Information Types (EITs) to an organization classification:

1. Define a new organization classification. You do not need to do this if you are setting up an EIT for a classification that already exists.

Note: To define a new classification, enter a new value for the Lookup type ORG_CLASS in the Lookup Values window.

2. Define the new EIT. See: Entering Table Values, page 3-41
 - Unprotect the Org Developer DF using the Register Descriptive Flexfield window. You must do this before you can query the flexfield on the Descriptive Flexfield window
 - Add the new structure for the EIT to the Org Developer DF descriptive flexfield using the Descriptive Flexfield Segments window. The structure must have as its context the name of the extra information type, and as this is a context sensitive descriptive flexfield you must enter C_ORG_INFORMATION_CONTEXT in the Reference Field. Compile in the same way as a standard descriptive flexfield.
 - Reset the protection, so the flexfield remains a protected descriptive flexfield.
3. Enter a row into HR_ORG_INFORMATION_TYPES. The columns you need to enter are shown in the following table:

Column name	Description
ORG_INFORMATION	Name of the type (same as DDF context).
DESCRIPTION	Description of the extra information type.
DISPLAYED_ORG_INFORMATION_TYPE	The Name of the Extra Information Type displayed in the Organization window.
NAVIGATION_METHOD	"GS" for single row, a user can only enter one extra information row for each organization. Alternatively, "GM" for multi row, a user can enter more than one row for each organization.
LEGISLATION_CODE	Optionally, you can enter a legislation code to restrict to which business groups the EIT is available. If you do not enter a legislation code it will be valid for all business groups.

4. Specify for which organization classifications this EIT should be available.
To do this, enter a row into HR_ORG_INFO_TYPES_BY_CLASS as shown in the following table:

Column name	Description
ORG_CLASSIFICATION	ORG_CLASS lookup code
ORG_INFORMATION_TYPE	Org extra information type
MANDATORY_FLAG	Y (for Yes) or N (for No)

Setting Up Extra Information Types For a Responsibility

Before a user can access an Extra Information Type (EIT), you must attach the EIT to the user's responsibility. By not adding information types to a responsibility, you restrict the information types that a user can access.

Note: You can select EITs for any legislation to add to a responsibility in this window. Users of the Oracle HRMS professional user interface are restricted to seeing the information types for the legislation of the business group to which they have access. Self-service users are restricted to seeing information types for the legislation of the record they are working with.

Use the Information Type Security window to link EITs to a responsibility.

To set up EITs for a responsibility:

1. Select the name of the responsibility to which to attach the EIT.
Oracle HRMS displays a list of EITs already associated with the responsibility you have chosen.
2. Enter or select the new EIT you want to link to the responsibility.
3. Save your work.

To copy EITs between responsibilities:

1. Query the responsibility from which you want to copy.
2. Select the Copy Responsibility button
3. Enter the responsibility to which you want to copy.
This responsibility is then displayed with the new EITs.
4. Save your work.

Entering Extra Information

You enter extra information in one or more windows available from the main window (such as the Job window). Your system administrator may have created configured versions of the extra information windows so that you can use each version for one information type only.

Your implementation team may have defined one or more types of extra information for you to record for:

- Locations
- Jobs
- Positions
- People
- Assignments
- Organization
- Element types

- Previous Job
- Contacts

To enter extra information:

1. Enter the type of extra information, for example Job Category.
Note: To access extra information in the Organization window select the Others button in the Organization Classifications region.
2. Click in the Details field to display the extra information fields you can enter.
3. Enter your extra information.
4. Save your work.

Running the Register Extra Information Types (EITs) Process

Use this process to register any new Extra Information Types (EITs) (excluding Organization EITs).

You run this process from the Submit Requests window.

To run the Register Extra Information Types (EITs) process:

1. In the Name field, select Register Extra Information Types (EITs).
The Parameters window opens.
2. In the Table Name field, select the table in which the EIT will be registered.
3. In the Information Type field, select the extra information type created in the Descriptive Flexfield Segments window. The value in the Table Name field determines which information types are available.
4. In the Multiple Rows field, specify whether multiple occurrences of the same infotype can exist.
5. In the Legislation Code field, select the legislation code for the information type. The default value is the legislation code of the current business group.
Note: If the information type is global, the legislation code value should be Null.
6. Optionally, enter a description for information type.
7. Choose the Submit button.

User-Defined Tables

User-Defined Tables

You may need to set up your own tables in your Oracle HRMS system, to hold data such as wage codes, shift differentials, or the amounts of certain deductions. You can set up all the tables you require using the Table Structure window. Using Oracle FastFormula, you can write simple formulas for validating entries made in table columns.

Notice that the Oracle HRMS user-defined tables are different from the database tables of the Oracle Relational Database Management System. When you set up a user table, you define the rows as well as the columns, like a matrix. For example, you could set up a table showing bonus amounts (the column) against years of service (the rows).

Important: You *do not* use the Table Structure window to set up tables holding information on medical, dental or vision benefit plans (benefits with the benefits classification Medical, Dental or Vision).

The Oracle HRMS database includes a special table, the Benefits Table, already set up to hold information on benefit plans with coverage levels, and the employee and employer contributions at each level. To enter information into this table you use the Benefit Contributions window.

See: Establishing Plan Coverage and Default Contributions (Basic Benefits), *Oracle HRMS Compensation and Benefits Management Guide*

See: Setting Up Basic Benefits, *Oracle HRMS Compensation and Benefits Management Guide*

Entering and Accessing Table Values

To enter values in tables, you use the Table Values window. Table entries and rows are both date tracked, so you can delete existing entries or rows, and add new ones, as of an effective date.

Oracle HRMS provides the GET_TABLE_VALUE function to access table values. You can write formulas that include calls to this function, perhaps for QuickPaint inquiries. Also, MIS personnel can write PL/SQL statements that call this function, to include in the code for a form or report process, for example.

Row Types for Payroll Tables

Tables set up to hold deduction amounts are called *payroll tables*. You need a payroll table when the amount of a deduction varies in accordance with a factor such as employee age, pay or job class.

To initiate a deduction with the amount rule Payroll Table, you must establish a *row type*. The formula for the deduction uses the row type to help determine which row of the table to go to for each employee's deduction amount. Your startup data includes three predefined row types: Age Range, Salary Range and Job Class. You can set up any additional types you require.

Predefined User Tables

Oracle HRMS supplies the following tables, already defined using the Table Structure window:

US Tables

COMPANY WORK SCHEDULES Table

This table has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday. For example, employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. For example, the header for the column holding the first schedule is *1 Schedule: 8-8-8-8-0-0*.

GTL PREMIUMS Table

For use in Oracle Payroll, this table holds the cost of Group Term Life insurance premiums per \$1,000 of coverage by age range, as maintained in the IRS Uniform Premiums table. The table rows hold age ranges, and its single column holds the premium for each \$1,000 of coverage for each age range.

Oracle Corporation provides you with updates to the GTL Premiums table, which your system administrator applies.

The predefined imputed earnings GTL Imputed Income references this table in its processing.

SHIFT DIFFERENTIALS Table

This table has no data already in it, but is ready for your data entry. Its rows hold the shift designators Day, Eve, Night and Split, representing the normal shifts employees work, and its columns have the same headings, for entry of differentials. You can add to or change the shift designators as necessary.

To look at examples of differentials entries, suppose day shift employees receive one and one-half times their regular pay when temporarily working the evening shift, twice their regular pay for the night shift, and three times their regular pay for the split shift. You enter 1.5, 2.0 and 3.0 as the differentials for day shift workers.

Example Shift Differentials Table

Time Period	D	E	N	S
Day	--	1.5	2.0	3.0

The predefined earnings types Regular Wages and Shift Pay reference this table in their processing in Oracle Payroll.

WAGE RATES Table

This table has no data in it when you receive your system, but is ready for your data entry. Its rows hold rate codes, and its single column holds the rate matching each code. This example holds codes for rates associated with the operation of different types of equipment:

Example Wage Rates Table

Rate Code	Rate
FL (forklift)	6.80
A3 (crane A3)	8.20
A7 (crane A7)	9.00

Oracle Payroll's predefined earnings types Regular Wages, Overtime, and Shift Pay reference this table in their processing.

Canada Tables

COMPANY WORK SCHEDULES Table

This table has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday. For example, employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. For example, the header for the column holding the first schedule is *1 Schedule: 8-8-8-8-0-0*.

SHIFT DIFFERENTIALS Table

This table has no data already in it, but is ready for your data entry. Its rows hold the shift designators Day, Eve, Night and Split, representing the normal shifts employees work, and its columns have the same headings, for entry of differentials. You can add to or change the shift designators as necessary.

To look at examples of differentials entries, suppose day shift employees receive one and one-half times their regular pay when temporarily working the evening shift, twice their regular pay for the night shift, and three times their regular pay for the split shift. You enter 1.5, 2.0 and 3.0 as the differentials for day shift workers.

Example Shift Differentials Table

Time Period	D	E	N	S
Day	--	1.5	2.0	3.0

WAGE RATES Table

This table has no data in it when you receive your system, but is ready for your data entry. Its rows hold rate codes, and its single column holds the rate matching each code. This example holds codes for rates associated with the operation of different types of equipment:

Example Wage Rates Table

Rate Code	Rate
FL (forklift)	6.80
A3 (crane A3)	8.20
A7 (crane A7)	9.00

Maximum Assessable Earnings

Wages defined as subject to the workers compensation premium are referred to as assessable wages. Each year, the workers' compensation board for each province and territory defines the maximum amount of employee wages that are deemed to be assessable. Use this table to enter the maximum assessable amount for each province or territory.

Manitoba HAPSET Rate

In Manitoba, health and post secondary premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED, as defined in taxability rules. The percentage rate used by the employer may be a flat percent, or vary based on the total amount of wages paid to all employees in the province. It may also involve an exemption. Use this table to enter the rate at which the premiums are calculated for each threshold of earnings. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Newfoundland/Labrador HAPSET Rate

In Newfoundland, health and post secondary premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. Use this table to enter the rate at which the premiums are calculated. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Quebec Health Services Fund Tax Rate

In Quebec, health premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. The percentage paid by the employer may vary based on the total amount of wages paid to all employees in the province. Use this table to enter the rate at which the premiums are to be calculated.

Ontario EHT Rate

In Ontario, health premiums are paid by the employer. These premiums are calculated as a percentage of wages subject to PMED as defined in taxability rules. The percentage paid by the employer may vary based on the total amount of wages paid to all

employees in the province. Use this table to enter the rate at which the premiums are calculated for each threshold of earnings. The thresholds are provided in a list of values. You must enter the associated rate for each threshold, including a rate of zero for any exempt earnings.

Default Vacation Bank

The Vacation Bank table holds the values that reflect a length of service band and the associated percentage at which the person would accumulate the vacation amount they are owed by an employer. For example, some provinces legislate that the minimum a person can accrue is 4% of their vacationable wages (as defined in the taxability rules for the province). Depending on the province, this may increase to 6% after a number of years of service. You must define each of these 'length of service' bands in the vacation bank table in order for employees to accrue the correct amount. The Default Vacation Bank table holds a value of 4% for all lengths of service. If you have different rules, you can create a new user table to hold the applicable values.

Hong Kong Tables

When the Mandatory Provident Fund (MPF) Board makes changes to the limits for a particular contribution, Oracle Payroll provides legislative updates that include the new limit information.

MPF Limits Table

The MPF limits table, `MPF_RI_LIMITS`, contains the MPF upper and lower limits for each valid time period.

Oracle Payroll references this table when processing MPF contributions.

Mexico Tables

Company Work Schedules Table

This table provides several commonly-used work schedules, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday. For example, employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. For example, the header for the column holding the first schedule is *1 Schedule: 8-8-8-8-0-0*.

Tax Subsidy Percentage

This table has no data already in it but is ready for your data entry. It provides the means to record and track your yearly tax subsidy percentage.

Work Risk Insurance Percentage

This table has no data already in it but is ready for your data entry. It provides the means to record and track your yearly work risk insurance percentage.

Singapore Tables

When the CPF Board makes changes to the rates for a particular contribution, Oracle Payroll for Singapore provides legislative updates that include the new rate information.

CPF Rates

The CPF rates tables, CPF_SCHEDULE_A to CPF_SCHEDULE_N, include the CPF rates that are payable for each employee, depending on the employee type, salary range, and age range.

Oracle Payroll references this table when processing involuntary CPF deductions.

FWL Rates

The FWL_RATES table holds the rates that are used to calculate an employer's Foreign Workers Levy (FWL) liability. The table includes the codes that determine the type of work performed by the employee, both skilled and unskilled, and the rate payable for that type of employee, depending on whether they worked for the entire month or just part of it.

Oracle Payroll references this table when processing FWL Employer Liability deductions.

Community Fund Rates

The following rate tables provide the monthly contribution rate for each community fund, depending on the employee's salary:

- SG_COMM_FUND_CDAC
- SG_COMM_FUND_ECF
- SG_COMM_FUND_MBMF
- SG_COMM_FUND_SINDA

Oracle Payroll references this table when processing involuntary Community Fund deductions.

Exchange Rate Types

The EXCHANGE_RATE_TYPES table includes conversion rate type information. Oracle Financials references this table.

Ireland Tables

PRSI Tables

The PRSI formula uses the following predefined tables with community flag to calculate which PRSI employee or employer deduction to use in a payroll. Community is a scheme run by the Irish Government to encourage employers to employ people for work. They are allowed certain number of people in their workforce, and in return the employer receives a reduced PRSI rate.

IE Class A Community Employee Monthly

IE Class A Community Employer Monthly

IE Class A Community Employee Weekly

IE Class A Community Employer Weekly

The PRSI formula uses the following predefined tables to calculate which PRSI employee or employer deduction to use in a payroll:

IE Class A, B, C, D, H, J, K and S Employee Monthly

IE Class A, B, C, D, H, J, K and S Employer Monthly

IE Class A, B, C, D, H, J, K and S Employee Weekly

IE Class A, B, C, D, H, J, K and S Employer Weekly

France Tables

Validation Table

The table PQH_FR_VALIDATIONS keeps the details regarding the validations available for a person. The Services Validation Process references this table when validating the previous services of the employee.

Validation Events Table

The table PQH_FR_VALIDATION_EVENTS keeps the details regarding the events for a particular validation. The Services Validation Process references this table to know the events history of the validation process.

Validation Periods Table

The table PQH_FR_VALIDATION_PERIODS keeps the period details for a particular validation of an individual. The Services Validation Process references this table while calculating the period of service.

Role Information Types Table

The table PQH_ROLE_INFO_TYPES keeps the details regarding the committee information types and is used for information purposes.

Role Extra Information Table

The table PQH_ROLE_EXTRA_INFO keeps the details regarding the extra information recorded against the role information types. These details are used for information purposes.

Termination

The termination reasons table FR_TERM_REASON_ADS_STATUS_CODE includes the reasons for the termination. Oracle HRMS references this information for generating the absence report.

Absence

The table FR_ABS_CATG_ADS_STATUS_CODE contains the information on the status of absence.

The table FR_ABS_CATG_ADS_ABS_CODE includes the information on absence categories provided by Oracle HRMS.

Oracle HRMS references these tables for the absence report.

Statutory information for maternity, paternity, and adoption leave duration is maintained in the seeded user defined table FR_MAP_DURATION.

Work Incident

The table FR_WORK_INC_ADS_ABS_CODE keeps the information on the type of work incident. Oracle HRMS references this table.

Legal Guaranteed Income

The table FR_LEGL_RATE_BANDS contains the information on the seniority of the person as of the parent absence date, the percentage rates and days to be paid at each of the rates. Oracle Payroll references this table while processing sick pay.

The table FR_LEGL_WAITING_DAYS provides information on the number of waiting days for the processing of legal guaranteed income. Oracle Payroll references this table.

IJSS

The table FR_IJSS_NON_OCCUP_RATES_MAX keeps the information on the social security benefit rates for non-occupational sicknesses.

The table FR_IJSS_OCCUP_RATES_MAX keeps the information on the social security benefit rates for occupational sicknesses and social security ceiling.

Oracle Payroll references these tables while processing sick pay.

Note: There are further predefined tables supplied with Oracle HRMS for France that are used in certain statutory reports.

See: User Defined Tables, *Oracle HRMS Enterprise and Workforce Management Guide*

See: User Defined Tables Used by the Bilan Social, *Oracle HRMS Enterprise and Workforce Management Guide*

Hungary Tables

Company Work Patterns

The table PQP_COMPANY_WORK_PATTERNS has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday. For example, employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. For example, the header for the column holding the first schedule is *1 Schedule: 8-8-8-8-0-0*

Spain Tables

Company Work Patterns

The table PQP_COMPANY_WORK_PATTERNS has several commonly-used work schedules already entered in it, and you can add more. A *work schedule* shows the hours employees normally work each day from Monday through Sunday. For

example, employees with the schedule 10-10-10-10-0-0-0 work 10 hours each day Monday through Thursday, and have Friday, Saturday and Sunday off.

Each column in this table holds a separate schedule, with each row holding the hours worked each day of the week for the schedule. For convenience, each column header names the schedule held in the column. For example, the header for the column holding the first schedule is *1 Schedule: 8-8-8-8-0-0*

Contract Key Relation Table

The ES_CONTRACT_KEY_RELATION table maps the relationship between the contract key, status, type, subtype, and start reason. Oracle HRMS references this table for social security information.

Setting Up User Tables, Columns and Rows

You set up user tables in the Table Structure window.

To set up the structure of a table:

1. Set your effective date to the date from which you want the table's row labels to take effect.
2. Enter the table name.
3. For the table's match type, select Match or Range. Select Match if each row is for one item, such as one job or one code. Select Range if each row is for a range of numeric values, such as an age range or a pay range.
4. If the match type is Match, select Date, Number or Text as the Key Units of Measure, depending on whether entries in the rows are dates, numbers, or alphanumeric text.

If the table's match type is Range, the Key Units of Measure automatically becomes Number.

5. Enter the row label as the Row Title.
For example, if the table rows refer to rate codes, an appropriate row title would be Rate Code. If the rows refer to age ranges, you might use the title Age Range.
6. Save your work, and choose the Columns button to go to the Columns window.

Column Setup

7. Enter labels for the table columns in the Name field.

Note: To add a new column to a table that already exists, place the cursor on the name of the column after which you want to enter the new column name, and choose Insert Record from the Edit menu to obtain a clear field.

8. If you are using formula validation for a column's entries, select the name of the validation formula for the column.
9. Save your work and close the window.

Row Setup

10. In the Table Structure window, choose the Rows button to go to the Rows window.

11. If the match type of the table is Match, enter the label for each table row in the fields under the heading Exact.

If the match type of the table is Range, enter numbers representing the lower and upper boundary of each row's range.
12. In the Sequence fields, you can optionally enter a number for each row label to determine the order in which it appears on a list in the Table Values window. Logical sequencing of row labels helps users enter table values rapidly and accurately.
13. When you are finished, save your work and close the window. Your table is now set up and ready to receive entries into its columns.

Entering Table Values

If you have set up user-defined tables, you can enter and maintain values in the Table Values window.

You can access table values from any formula used for input-value validation, payroll calculation or definition of skip-rules, assignment sets or QuickPaint reports. You can access this information using the `GET_TABLE_VALUE` function.

Note: The system administrator can create configured versions of the Table Values window so that you use each version for one user table only.

To enter values into table columns:

1. Set your effective date to the date from which you want the entries to take effect.
2. Query the table name.
3. With the cursor in the Column Name field, use the up and down arrows to locate the name of the column in which you want to make entries.
4. In the Values region, select each row for which you want to make an entry. You select rows in the Exact field or the Lower Bound field, depending on the match type of the table.
5. For each row, make the appropriate entry in the Value field.
6. Save your work.

Lookups

Lookups

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- It ensures that all users use the same terminology, which makes it easier to inquire and report on the information.
- It speeds up data entry because you can enter just enough to identify the value, and the system completes the entry.

In Oracle HRMS, a list of values is called a *lookup type*. Each value comprises a code, a meaning, and sometimes, a legislative tag. For example:

Lookup Type	Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

The codes are used internally; users do not see them. There is a maximum of 250 lookups for each lookup type.

Your localization team uses the Tag column to define the lookup codes that are used by each localization. In this example, the Married and Single codes are visible to all legislations. The Registered Partner code is visible to the Dutch legislation only. The code for Domestic Partner, however, is visible to all legislations *except* France and Australia.

Predefined Lookup Types

A number of lookup types are included in Oracle HRMS. Some contain codes as startup data. You can never delete these codes, but you can change their meaning. For some lookup types, you can also disable the codes that are supplied. Your ability to disable codes and add new codes is determined by the *access level* of the lookup type:

- **User** - You can add codes and you can disable supplied codes.
- **Extensible** - You can add new codes, but you cannot disable supplied codes because the system uses them.
- **System** - You can neither add codes nor disable supplied codes. You can only change the meaning or description of supplied codes.

See User and Extensible Lookups, page 3-43 for a list of the predefined lookup types with an access level of User or Extensible.

You can also create your own lookup types in the lookup type window. These all have an access level of User.

Global and Local Lookup Types

If you are using Security Groups Enabled security, lookup types may be either global or local:

- Global lookup types are available to all business groups
- Local lookup types are only available to the business group/security group in which they are created.

Local lookups can be implemented in either of the following ways:

- You can create an override. This means that you retain the global name for the lookup type, but supply local values appropriate for your business group. The extent to which you can do this is determined by the access level for the lookup type.
- You can create an entirely new lookup type with lookup values that are only applicable to your local business group.

When you connect to any business group you will therefore have access to each of the following:

- The global lookup types and values
- Local overrides to the global lookup values
- Local lookup types and values

User and Extensible Lookups

The following table shows the field and legislation for user and extensible lookups.

Field	Lookup	Legislation
Category (absence)	ABSENCE_CATEGORY	All
Reason (for absence)	ABSENCE_REASON	All
Account Type (for bank details)	ACC_TYPE	All
Categories (for activities, programs, packages)	ACTIVITY_CATEGORY	All
Successful attendance (for activity based events)	ACTIVITY_SUCCESS_CRITERIA	All
User Status (for an activity)	ACTIVITY_USER_STATUS	All
Address Type	ADDRESS_TYPE	All
AK Web Region Codes	AK_WEB_REGION_CODES	All
Reason (for application assignment status)	APL_ASSIGN_REASON	All
Type (event type for applicant)	APL_EVENT_TYPE	All
Type (interview type for applicant)	APL_INTERVIEW_TYPE	All

Field	Lookup	Legislation
Reason (for secondary assignment status)	APL_SEC_ASSIGN_REASON	All
Appraisal and Assessment Status (appraisal and assessment on SSHR)	APPRAISAL_ASSESSMENT_STATUS	All
Types of appraisal processed by appraisal functionality	APPRAISAL_SYSTEM_TYPE	All
Appraisal and Assessment Type (appraisal and assessment on SSHR)	APPRAISAL_TYPE	All
	AT_PROVINCE	All
Activity (for work incident)	AT_WORK_FLAG	All
Australian Tax Office Codes	AU_ATO_OFF	Australia
Australian Direct Entry Indicator	AU_DE_IND	Australia
Australian Direct Entry Transaction Code	AU_DE_TRN_CDE	Australia
State (Australian addresses)	AU_STATE	All
Years until eligible for long service leave on termination	AU_TERM_LSL_ELIGIBILITY_YEARS	Australia
Balance Type Category	BACKFEED_BT_CATEGORY	All
Check Type Category	BACKFEED_PD_CHECK_TYPE	All
Bank account name	BANK_ACCOUNT_NAME	All
Bank account number	BANK_ACCOUNT_NUMBER	All
Bank account type	BANK_ACCOUNT_TYPE	All
Bank branch	BANK_BRANCH	All
Bank name	BANK_NAME	All
Bargaining Unit (for assignment)	BARGAINING_UNIT_CODE	All
Bank name	BE_BANK	Belgium
City (Belgian addresses)	BE_CITY	Belgium
Contract Category	BE_CONTRACT_CATEGORY	Belgium

Field	Lookup	Legislation
Disciplinary Action	BE_DISCIPLINARY_ACTION	Belgium
Disciplinary Body	BE_DISCIPLINARY_BODY	Belgium
Employee Coding	BE_EMPLOYEE_CODING	Belgium
Employee Type	BE_EMPLOYEE_TYPE	Belgium
Ending Reason	BE_ENDING_REASON	Belgium
Misdemeanour Type	BE_MISDEMEANOUR_TYPE	Belgium
Organization Language	BE_ORGANIZATION_ LANGUAGE	Belgium
Reduced Charges Category	BE_REDUCED_CHARGES_ CATEGORY	Belgium
RSZ Category	BE_RSZ_CATEGORY	Belgium
Starting Reason	BE_STARTING_REASON	Belgium
Yes/No	BE_YES_NO	Belgium
Action Type	BEN_ACTN_TYP	All
Activity Type	BEN_ACTY_TYP	All
Benefits Balance Usage	BEN_BNFTS_BAL_USG	All
Certification Type	BEN_BNF_CTFN_TYP	All
	BEN_CMP_ENRT_ACTN_TY P	All
Compensation Category	BEN_COMP_TYP	All
Type	BEN_CRT_ORDR_TYP	All
Delivery Medium	BEN_DLVRY_MED	All
Delivery Method	BEN_DLVRY_MTHD	All
	BEN_DLVRY_SCHED_INFO	All
Dependent Coverage Certification Type	BEN_DPNT_CVG_CTFN_TY P	All
Enrollment Certification Type	BEN_ENRT_CTFN_TYP	All
Life Event Occurred Date Code	BEN_EVAL_DET	All
Change Event	BEN_EXT_CHG_EVT	All

Field	Lookup	Legislation
Format Mask	BEN_EXT_FRMT_MASK	All
Operator	BEN_EXT_OPER	All
Run Status	BEN_EXT_STAT	All
Condition (Optional) Where	BEN_EXT_TTL_COND_O PER	All
Field	BEN_FIELD	All
	BEN_FILE_CTL_TTL_TYP	All
	BEN_FILE_DTA_TYP	All
Type	BEN_FILE_RCRD_TYP	All
	BEN_FILE_TYP	All
	BEN_FILE_UPDT_TYP	All
	BEN_FL_TM_PT_TM	All
Type	BEN_GD_R_SVC_TYP	All
	BEN_GNDR	All
Health Service	BEN_HLTH_CARE_SVC_TYP	All
	BEN_INFO_SRC	All
	BEN_INTRFC_TYP	All
	BEN_MED_CNTNT_TYP	All
	BEN_MED_FMT_TYP	All
Non-Monetary UOM	BEN_NNMNTRY_UOM	All
Option Type	BEN_OPT_TYP	All
Organization Roles	BEN_ORG_ROLE_TYP	All
Reason	BEN_OVRID_RSN	All
Designation code	BEN_PCP_DSGN	All
Program Group	BEN_PGM_GRP	All
Program Type	BEN_PGM_TYP	All
	BEN_PIN_PRPS	All
Product	BEN_PRDCT	All

Field	Lookup	Legislation
Type	BEN_PRMRY_CARE_ PRVDR_TYP	All
Primary Funding Method	BEN_PRMRY_FNDG_MTHD	All
	BEN_PRTN_CTFN_TYP	All
Payment Schedule	BEN_PYMT_SCHED	All
QDRO Payment Distribution	BEN_QDRO_DSTR_MTHD	All
Administrative Code	BEN_REGN_ADMIN	All
Regulatory Plan Type	BEN_REGY_PL_TYP	All
Regulatory Purpose	BEN_REGY_PRPS	All
Type	BEN_REIMBMT_CTFN_TYP	All
	BEN_RESND_RSN	All
	BEN_RMBT_CTFN_TYP	All
Purpose	BEN_RPTG_PRPS	All
Waive Coverage Reason	BEN_WV_CVG_RSN	All
Waive Participation Certification Type	BEN_WV_PRTN_CTFN_TYP	All
Waiving Participation Reason	BEN_WV_PRTN_RSN	All
Blood Type	BLOOD_TYPE	All
Source of student	BOOKING_SOURCE	All
Measurement Type (for budget)	BUDGET_MEASUREMENT_ TYPE	All
Cash Analysis (for a cash payment)	CASH_ANALYSIS	All
Census Metropolitan Area (Canada)	CA_CMA	Canada
Canadian Payment Association Codes	CA_DD_CPA_CODES	Canada
Element categories	CA_EMPLOYER_LIABILIT IES	Canada
Select Form to be printed (Canada)	CA_FORM_NAME	Canada

Field	Lookup	Legislation
Element categories	CA_INVOLUNTARY_DEDUCTIONS	Canada
Element categories	CA_PAYMENT	Canada
Province (Canadian addresses)	CA_PROVINCE	All
Element categories	CA_REGULAR_EARNINGS	Canada
Element categories	CA_SUPPLEMENTAL_EARNINGS	Canada
Element categories	CA_TAXABLE_BENEFITS	Canada
Element categories	CA_VOLUNTARY_DEDUCTIONS	Canada
Method	CERTIFICATION_METHOD	All
List of Swiss Cantons	CH_CANTON	All
	CHECKBOX	All
Check item (on a checklist)	CHECKLIST_ITEM	All
Status (of an item on a checklist)	CHECKLIST_STATUS	All
User friendly names for cheque/check-ordering SQL statement	CHEQUE_PROCEDURE	All
User friendly names for cheque/check-writing SRW2 reports.	CHEQUE_REPORT	All
Company Age (for salary surveys mappings)	COMPANY_AGE	All
Company Size (for salary surveys)	COMPANY_SIZE	All
Primary Evaluation Method	COMPETENCE_EVAL_TYPE	All
Consultation Type	CONSULTATION_TYPE	All
Consultation Result	CONSULTATION_RESULT	All
Competence Type	COMPETENCE_TYPE	All
Type (relationship of one person to another)	CONTACT	All
Contract End Reason	CONTRACT_END_REASON	All

Field	Lookup	Legislation
Contract Start Reason	CONTRACT_START_REASON	All
Contract Status	CONTRACT_STATUS	All
Contract Status Reason	CONTRACT_STATUS_REASON	All
Contract Types	CONTRACT_TYPE	All
Contract Types (Belgium)	CONTRACT_TYPE_BE	Belgium
Type (of MIX batch control total)	CONTROL_TYPE	All
Assignment Category	CWK_ASG_CATEGORY	All
Reason (for contingent worker assignment)	CWK_ASSIGN_REASON	All
Reason (for contingent worker secondary assignment status)	CWK_SEC_ASSIGN_REASON	All
Reason a student failed to successfully complete an event.	DELEGATE_FAILURE_REASON	All
User defined Type to categorize development events.	DEV_EVENT_TYPE	All
Bank Code	DE_BANK_CODE	Germany
Course Type (for qualifications)	DE_COURSE_TYPE	Germany
Establishment Type (for qualifications)	DE_ESTABLISHMENT_TYPE	Germany
Hereditary Title	DE_HEREDITARY_TITLE	Germany
Work Incident Status	DE_INCIDENT_STATUS	Germany
License Type (degree type)	DE_LICENSE_TYPE	Germany
Organization Link Type	DE_LINK_TYPE	Germany
Name Prefix	DE_PREFIX	Germany
Professional Title	DE_PROF_TITLE	Germany
	DE_REGION	All
Category (of disability)	DISABILITY_CATEGORY	All

Field	Lookup	Legislation
Reason (for disability)	DISABILITY_REASON	All
Status (of disability)	DISABILITY_STATUS	All
Disease Type	DISEASE_TYPE	All
Document Status (contract)	DOCUMENT_STATUS	All
Reason (for element entry)	ELE_ENTRY_REASON	All
Reason (for employee assignment)	EMP_ASSIGN_REASON	All
Employment Category	EMP_CAT	All
Type (of employee event)	EMP_EVENT_TYPE	All
Type (of interview for employee)	EMP_INTERVIEW_TYPE	All
Reason (for secondary assignment status)	EMP_SEC_ASSIGN_REASON	All
Employee Category	EMPLOYEE_CATG	Mexico
Reason (for change in enrollment status)	ENROLLMENT_STATUS_REASON	All
	ES_PROVINCE	All
Ethnic Origin	ETH_TYPE	All
System (job or position evaluation system)	EVAL_SYSTEM	All
Measurement In (type for EVAL SYSTEM)	EVAL_SYSTEM_MEAS	All
User defined status for an event	EVENT_USER_STATUS	All
Type (of work pattern exception)	EXCEPTION_CATEGORY	All
Type (of finance line)	FINANCE_LINE_TYPE	All
Type (of formula)	FORMULA_TYPE	All
Activity Type	FR_ACTIVITY_TYPE	France
Address Suffix	FR_ADDRESS_SUFFIX	France
AGIRC/ARRCO	FR_AGIRC_ARRCO	France

Field	Lookup	Legislation
Bank	FR_BANK	France
Contract Category	FR_CONTRACT_CATEGORY	France
Disability/COTOREP Code	FR_COTOREP_CODE	France
DADS Type	FR_DADS_TYPE	France
Department	FR_DEPARTMENT	France
Disciplinary Actions	FR_DISCIPLINARY_ACTION	France
Education Status	FR_EDUCATION_STATUS	France
Employee Category	FR_EMPLOYEE_CATEGORY	France
Employee Status	FR_EMPLOYEE_STATUS	France
Employer Type	FR_EMPLOYER_TYPE	France
Employment Type	FR_EMPLOYMENT_TYPE	France
Ending Reason	FR_ENDING_REASON	France
Guaranteed ID	FR_GI_TYPES	France
Class of Illness	FR_ILLNESS_CLASS	France
Type of Illness	FR_ILLNESS_TYPE	France
Invalidity Category	FR_INVALIDITY_CLASS	France
Qualification Level	FR_LEVEL_OF_WORKER	France
Mandate Type	FR_MANDATE_TYPE	France
Type of Medical Examination	FR_MEDICAL_EXAMINATION_TYPE	France
Result of Medical Examination	FR_MEDICAL_RESULT	France
Military Service Status	FR_MILITARY_SERVICE_STATUS	France
Military Service Types	FR_MILITARY_SERVICE_TYPE	France
Misdemeanor Type	FR_MISDEMEANOUR_TYPE	France
NAF/APE Code	FR_NAF_CODE	France
PCS Code	FR_PCS_CODE	France
Pension Code	FR_PENSION_CODE	France

Field	Lookup	Legislation
Reason (in Person EIT-French Public Sector additional Seniority Details)	FR_PQH_ADDDL_REASON	France
Activity (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_ACTIVITY	France
Army Body (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_BODY	France
Hierarchy (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_HIERARCHY	France
Rank (in Person EIT-French Public Sector Soldier Details)	FR_PQH_ARMY_RANK	France
Bonification Type (in Person EIT-French Public Sector Bonification Details)	FR_PQH_BONIFICATION_TYPE	France
Level	FR_PQH_COMMITTEE_LEVEL	France
Type (Members)	FR_PQH_COMMITTEE_MEMBER_TYPE	France
Mention (in Qualification Type DDF)	FR_PQH_DIPLOMA_MENTION	France
Optional (in Qualification Type DDF)	FR_PQH_DIPLOMA_OPTION	France
Specialty (in Qualification Type DDF)	FR_PQH_DIPLOMA_SPECIALITY	France
Sub-Specialty (in Qualification Type DDF)	FR_PQH_DIPLOMA_SUB_SPECIALITY	France
Relationship Type	FR_PQH_EXT_ORG_TYPE	France
Category (in Corps)	FR_PQH_GRADE_CATEGORY	France
Badge Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_BADGE_NAME	France
Level (in Ministry Awards SIT)	FR_PQH_MINISTRY_LEVEL	France
Medal Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_MEDAL_NAME	France
Order Name (in Ministry Awards SIT)	FR_PQH_MINISTRY_ORDER_NAME	France

Field	Lookup	Legislation
Activity (in Organization EIT)	FR_PQH_ORG_ACTIVITY	France
Physical Share (in Assignment: Statutory Information)	FR_PQH_PHYSICAL_SHARE	France
Type of Service (in Person EIT-French Public Sector Soldier Details)	FR_PQH_TYPE_OF_ARMY_SERVICE	France
Event	FR_PQH_VALIDATION_EVENT	France
Previous Employer COTOREP Type	FR_PREVIOUS_COTOREP	France
Department	FR_REGION	France
Representative Type	FR_REPRESENTATIVE_TYPE	France
Starting Reason	FR_STARTING_REASON	France
Types of French Training	FR_TRAINING_TYPE	France
Type of Worker	FR_TYPE_OF_WORKER	France
URSSAF Code	FR_URSSAF_CODE	France
Visa Status	FR_VISA_STATUS	France
Visa Type	FR_VISA_TYPE	France
Work Accident Code	FR_WORK_ACCIDENT_CODE	France
Work Accident Result	FR_WORK_ACCIDENT_RESULT	France
Type of Work Accident	FR_WORK_ACCIDENT_TYPE	France
Work Pattern	FR_WORK_PATTERN	France
Medical Service	FR_WORK_MEDICAL_SERVICE	France
Situation Sub Type	FR_PQH_STAT_SIT_SUB_TYPE	France
Situation Reason	FR_PQH_STAT_SIT_REASON	France
Type of Request	FR_PQH_STAT_SIT_RQST_TYPE	France
Representative Body's method of funding	FUNDING_METHOD	All

Field	Lookup	Legislation
Authority (for PAYE details)	GB_AUTHORITY	GB
Bank Name	GB_BANKS	GB
Certificate (for element NI)	GB_CERTIFICATE	GB
Cheque/Check Style	GB_CHEQUE_REPORT	GB
County (UK addresses)	GB_COUNTY	GB
Pay day type	GB_PAY_DAY_TYPE	GB
Pension	GB_PENSION	GB
Allows users to to define valid SCON number for NI SCON input	GB_SCON	GB
Sequence (for the BACS process)	GB_SORT_SEQUENCE	GB
Names of Item Types for HR Summary Process	GSP_ITEM_TYPE	All
Names of Key Types for HR Summary Process	GSP_KEY_TYPE	All
Names of Restriction Types for HR Summary Process	GSP_RESTRICTION_TYPE	All
Hazard	HAZARD_TYPE	All
Area (Hong Kong addresses)	HK_AREA_CODES	Hong Kong
Rental/Passage Deduction Level	HK_DEDUCTION_LEVEL	Hong Kong
Leaving Reasons	HK_DEPARTURE_REASONS	Hong Kong
IR56B Origin	HK_IR56B_ORIGIN	Hong Kong
IR56 Box Descriptions	HK_IR56_BOX_DESC	Hong Kong
MPF Voluntary Processing Rules	HK_MPF_PROC_RULE	Hong Kong
MPF Wage Base	HK_MPF_WAGE_BASE	Hong Kong
Nature of Quarters	HK_NATURE_OF_ QUARTERS	Hong Kong
Overseas Payment Amount Known	HK_OVERSEAS_PAYMENT	Hong Kong
Returning to Hong Kong	HK_RETURN_TO_HK	Hong Kong

Field	Lookup	Legislation
Tax Reporting Year	HK_TAX_YEAR	Hong Kong
Document Category	HR_ADI_DOCUMENT_TYPE	All
Date Posted	HR_APPLICATION_DATE	All
Hire Date	HR_HIRE_DATE	All
Banks in Ireland	HR_IE_BANK	Ireland
Date Posted	HR_JOB_POSTED_DATE	All
HR Metalink Application	HR_METALINK_APPLICATION	All
Academic Title	HR_NL_ACADEMIC_TITLE	NL
Dutch Bank Details	HR_NL_BANK	NL
Dutch Cities	HR_NL_CITY	NL
Correspondence Language	HR_CORR_LANGUAGE	NL
Dutch HR WAO Disability	HR_NL_DI_WAO	NL
Full Name Format	HR_NL_FULL_NAME_FORMAT	NL
Identification Certificate	HR_NL_ID_CERTIFICATE	NL
Job Level	HR_NL_JOB_LEVEL	NL
Nationality	HR_NL_NATIONALITY	NL
Province	HR_NL_PROVINCE	NL
Dutch Regions	HR_NL_REGIONS	NL
Royal Title	HR_NL_ROTAL_TITLE	NL
End Reasons for Social Health Insurance Report	HR_NL_SHI_END	NL
Special Title	HR_NL_SPECIAL_TITLE	NL
Field Labels	HR_FORM_LABELS	NL
Batch process used by OTM	HXT_BATCH_STATUS	All
Days of the week	HXT_DAY_OF_WEEK	All
Process modes used by OTM	HXT_PROCESS_MODE	All
Benefit Type	IE_BENEFIT_TYPE	Ireland

Field	Lookup	Legislation
Calculation Option	IE_CALC_OPTION	Ireland
Ethnic Origin, Mother's Maiden Name	IE_FORM_LABELS	Ireland
County (Irish addresses)	IE_COUNTY	Ireland
Basis of Tax Assessment	IE_PAYE_ASSESS_BASIS	Ireland
Information Source	IE_PAYE_INFO_SOURCE	Ireland
Tax Basis	IE_PAYE_TAX_BASIS	Ireland
Postal Code	IE_POSTAL_CODE	Ireland
Contribution Class	IE_PRSI_CONT_CLASS	Ireland
Qualification Type	IE_QUAL_TYPES	Ireland
Incident Type	INCIDENT_TYPE	All
Industry (for salary survey)	INDUSTRY	All
Injury	INJURY_TYPE	All
Bank Name	IT_BANK	Italy
City (Italian addresses)	IT_CITY	Italy
Collective Agreement	IT_COLLECTIVE AGREEMENTS	Italy
Contract Type	IT_CONTRACT_TYPE	Italy
Text to be displayed on Italian specific field prompts	IT_FORM_LABELS	Italy
Employment Category	IT_EMP_CAT	Italy
Province (Italian addresses)	IT_PROVINCE	All
Trade Unions	IT_TRADE_UNIONS	Italy
Unemployment Insurance Codes	IT_UNEMPLOYMENT_INSURANCE_CODE	Italy
Unemployment Insurance Sub Codes	IT_UNEMPLOYMENT_INS_SUB_CODE	Italy
Extra Job Information	JOB_CATEGORY	All
Categories of Jobs	JOB_CATEGORIES	All

Field	Lookup	Legislation
Representative Body's Jurisdiction	JURISDICTION	All
Reason (for leaving)	LEAV_REAS	All
	LOCAL_BAL_FORM_NAME	All
Marital Status	MAR_STATUS	All
Marital Status (Belgium)	MAR_STATUS_BE	Belgium
Government Employment Sector	MX_HR_EMP_CAT	Mexico
MX_SOCIAL_SECURITY_SALARY_TYPE	Social Security Salary Type	Mexico
	MX_STATE	All
	MY_STATE	All
North American Industry Code for Canada	NAIC	All
Nationality	NATIONALITY	All
NI Unique Error or Warning	NL_UNIQUE_ERROR_WARNING	All
	NL_REGION	All
Reason	NPW_TERMINATION_REASONS	All
Region (New Zealand addresses)	NZ_COUNTIES	All
District of Origin	NZ_DISTRICT_OF_ORIGIN	New Zealand
Ethnic Origin	NZ_ETHNIC_ORIGIN	New Zealand
Tribal Group	NZ_TRIBAL_GROUP	New Zealand
Organization Type	ORG_TYPE	All
Class Begins	OTA_ENROLL_CLASS_DATE	All
Use to which a work pattern is or may be put	PATTERN_PURPOSE	All
Type of checksum used for deductions batches	PAY_PDT_DED_CKSUM	All

Field	Lookup	Legislation
Type of checksum used for earnings deductions batches	PAY_PDT_EARN_CKSUM	All
Type of checksum used for time entry batches	PAY_PDT_TIME_CKSUM	All
Category	PER_CATEGORIES	All
Communication delivery method, Report Method	PER_CM_MTHD	All
Cluster	PER_COMPETENCE_CLUSTER	All
FTE Capacity	PER_FTE_CAPACITY	All
Minimum Service	PER_LENGTHS_OF_SERVICE	All
Field	PER_QUAL_FWK_FIELD	All
Provider	PER_QUAL_FWK_PROVIDER	All
QA Organization	PER_QUAL_FWK_QA_ORG	All
Sub-Field	PER_QUAL_FWK_SUB_FIELD	All
Relocation	PER_RELOCATION_PREFERENCES	All
Status	PER_SUBJECT_STATUSES	All
Subject	PER_SUBJECTS	All
Work Duration	PER_TIME_SCALES	All
Tuition Method	PER_TUITION_METHODS	All
US Country Code	PER_US_COUNTRY_CODE	USA
I9 Status	PER_US_I9_STATE	USA
US Income Types	PER_US_INCOME_TYPES	USA
US Process Type	PER_US_PROCESS_TYPE	USA
US Residency Status	PER_US_RES_STATUS	USA
US Visa Categories	PER_US_VISA_CATEGORIES	USA
US Visa Types	PER_US_VISA_TYPES	USA

Field	Lookup	Legislation
US Visit Code	PER_US_VISIT_CODE	USA
Work Hours	PER_WORK_HOURS	All
Work Schedule	PER_WORK_SCHEDULE	All
Rating	PERFORMANCE_RATING	All
Type	PHONE_TYPE	All
Reason (for grade step placement)	PLACEMENT_REASON	All
Position Family	POSITION_FAMILY	All
Status (of reserved position)	POSITION_RESERVED_STATUS	All
Status (of position)	POSITION_STATUS	All
Academic Rank	PQH_ACADEMIC_RANK	USA
Document Type (in Corps: Document Details)	PQH_CORPS_DOC_TYPE	FR
Type of Exam (in Corps: Entrance Exams)	PQH_CORPS_EXAM_TYPE	FR
Filere (in Position and Corps HGRID)	PQH_CORPS_FILERES	FR
Way of Joining Corps (in Corps: Other Details)	PQH_CORPS_WAYS	FR
Requirements (in Corps: Other Details)	PQH_CORPS_WAYS_CRITERIA	FR
	PQH_PA_HGRID_NODE_IMAGE	All
	PQH_PA_HGRID_ROLLOVER_TEXT	All
Tenure Status	PQH_TENURE_STATUS	USA
Element Extra Information (rate type name)	PQP_RATE_TYPE	UK
Subtype (for previous employer)	PREV_EMP_SUBTYPE	All
Type (for previous employer)	PREV_EMP_TYPE	All
Student Enrollments Priority	PRIORITY_LEVEL	All

Field	Lookup	Legislation
Type (of Professional Credits)	PROFESSIONAL_CREDIT_TYPE	All
Source of Proficiency Rating	PROFICIENCY_SOURCE	All
A label given to group events within a program	PROGRAM_MEMBERSHIP_GROUP	All
Reason (for salary proposal)	PROPOSAL_REASON	All
Units (qualifying units for probation period)	QUALIFYING_UNITS	All
Basis	RATE_BASIS	All
Type (of recruitment activity, also used in application source)	REC_TYPE	All
Report Method	REPORT_METHOD	All
	RECON_STATUS	All
Type (of resource)	RESOURCE_TYPE	All
Reason (a resource is used by an activity)	RESOURCE_USAGE_REASON	All
Account Type	SG_ACCOUNT_TYPE	Singapore
Bank Code	SG_BANK_CODE	Singapore
Employer IRAS Category	SG_EMPLOYER_IRAS_CATEGORY	Singapore
Permit Category	SG_PERMIT_CATEGORY	Singapore
Race	SG_RACE	Singapore
Religion	SG_RELIGION	Singapore
Survey Age (for salary surveys)	SURVEY_AGE	All
Survey Company (for salary surveys)	SURVEY_COMPANY	All
Job Name (for salary surveys)	SURVEY_JOB_NAME	All
Region (for salary surveys)	SURVEY_REGION	All
Seniority (for salary surveys)	SURVEY_SENIORITY	All
Reason (for terminating application)	TERM_APL_REASON	All

Field	Lookup	Legislation
Prefix	TITLE	All
Uses Tobacco (for benefits)	TOBACCO_USER	All
Role (of trainer in event)	TRAINER_PARTICIPATION	All
Center (where event takes place)	TRAINING_CENTRE	All
Type (of unit for event pricing)	TRAINING_UNIT	All
Accrual Start	US_ACCRUAL_START_TYPE	All
Status of request for accommodation	US_ADA_STATUSES	All
Coverage Level (for medical, dental and vision benefit plans)	US_BENEFIT_COVERAGE	All
Status (of continued coverage)	US_COBRA_STATUS	All
Reason (for COBRA Termination)	US_COBRA_TERM_REASON	All
Category (within Earnings classification)	US_EARNINGS	All
Category (within Imputed Earnings classification)	US_IMPUTED_EARNINGS	All
Category (within Information classification)	US_INFORMATION	All
Category (within Involuntary Deductions classification)	US_INVOLUNTARY_DEDUCTIONS	All
Job Groups	US_JOB_GROUPS	All
Filing Status for local income tax	US_LIT_FILING_STATUS	All
Exemption Reason (for excluding employee from New Hire report)	US_NEW_HIRE_EXCEPTIONS	All
Category (within Nonpayroll Payments classification)	US_PAYMENT	All
Category (of accrual plan)	US_PTO_ACCRUAL	All
Filing Status for state income tax	US_SIT_FILING_STATUS	All
State (US addresses)	US_STATE	All

Field	Lookup	Legislation
Category (within Supplemental Earnings classification)	US_SUPPLEMENTAL_EARNINGS	All
Row Type (for Payroll Tables)	US_TABLE_ROW_TYPES	All
List of different instances of US Payroll Tax Balance reports	US_TAX_REPORT	All
Category (within Voluntary Deductions classification)	US_VOLUNTARY_DEDUCTIONS	All
Position of WC surcharge (after experience modifications and after premium discount)	US_WC_SURCHARGE_POSITION	All
Category (of a vacancy, for use in HR Direct Access)	VACANCY_CATEGORY	All
Status (of a vacancy)	VACANCY_STATUS	All
Type of Reporting Organization	VETS_ORG_TYPE	All
User friendly names for cheque writing SRW2 reports	W2_BOX-14_USER_DEFINED	All
Name (of global used in workflow)	WF_GLOBAL	All
Availability Schedule	WORK_SCHEDULE	All
Aggregate Third Party Cheque Types	ZA_AGG_3RD_CHEQUE_REPORT	S Africa
Cheque Reports	ZA_CHEQUE_REPORT	S Africa
Credit Transfer Cheque Reports	ZA_CT_CHEQUE_REPORT	S Africa
Employment Equity Occupational Categories	ZA_EMP_EQ_OCCUPATIONAL_CAT	S Africa
Employment Equity Occupational Levels	ZA_EMP_EQ_OCCUPATIONAL_LEV	S Africa
Employment Equity Reports	ZA_EMP_EQ_REPORT_VALUES	S Africa
Language Preference	ZA_LANG_PREF	S Africa
NQF Activity Names	ZA_NQF_ACTIVITY_NAMES	S Africa

Field	Lookup	Legislation
NQF Chamber Names	ZA_NQF_CHAMBER_NAMES	S Africa
Race	ZA_RACE	S Africa
Religion	ZA_RELIGION	S Africa
RSC Regions	ZA_RSC_REGIONS	S Africa
Sort Order for Tax Certificates	ZA_TAXCERT_SORT	S Africa
Tax Area	CN_TAX_AREA	China
Social Insurance/PHF Contribution Area	CN_SIC_AREA	China
Notice Duration Unit	CN_DURATION_UNIT	China
Province/City/SAR (Personal Address Information and Location Address windows)	CN_PROVINCE	China
Hukou Location	CN_HUKOU_LOCN	China
Hukou Type	CN_HUKOU_TYPE	China
Health Status	CN_HEALTH_STATUS	China
Race/Ethnic Origin	CN_RACE	China
Highest Education Level	CN_HIGH_EDU_LEVEL	China
Enterprise Category	CN_ENTRP_CATEGORY	China
Archive Format	CN_FILE_ARCHIVE	China
Last Level	CN_MILITARY_LEVEL	China
Last Rank	CN_MILITARY_RANK	China
Type of Exception	CN_PARTY_EXCEPTION	China
Party Status	CN_PARTY_STATUS	China
Party Type	CN_PARTY_TYPE	China
Type	CN_RDP_TYPE	China
Technical Title	CN_TECH_TITLE	China
Way to obtain Title	CN_TECH_WAY	China
Religion	GCC_RELIGION	For all GCC countries. Saudi Arabia, Kuwait

Field	Lookup	Legislation
Employment Status	SA_EMPLOYMENT_STATUS	Saudi Arabia
City	SA_CITY	Saudi Arabia
Bank	SA_BANKS	Saudi Arabia
Bank	HU_BANKS	Hungary
County	HU_COUNTY	Hungary
Location Types	HU_LOCATION_TYPES	Hungary
Nationality	HU_NATIONALITY	Hungary
Form Labels	HU_FORM_LABELS	Hungary
Company Formation	HU_COMPANY_FORMAT ION	Hungary
Pension Provider	HU_PENSION_PROVIDERS	Hungary
Job Classification	HU_JOB_CLASSIFICATION	Hungary
Joining Reason	HU_JOINING_REASON	Hungary
Military Rank	HU_MILITARY_RANK	Hungary
Civil Defense Organization	HU_CIVIL_DEFENCE_ORG	Hungary
Civil Local Department	HU_CIVIL_LOCAL_DEPT	Hungary
Civil Local Sub Department	HU_CIVIL_LOCAL_SUB_DE PT	Hungary
Civil Group	HU_CIVIL_GROUP	Hungary
Civil Sub Group	HU_CIVIL_SUB_GROUP	Hungary
Banks	ES_BANKS	Spain
Company Types	ES_COMPANY_TYPES	Spain
Province	ES_PROVINCE	Spain
Province codes	ES_PROVINCE_CODES	Spain
Form Labels	ES_FORM_LABELS	Spain
Identifier Type	ES_IDENTIFIER_TYPE	Spain
Epigraphs	ES_EPIGRAPHS	Spain
Contract Subtype	ES_CONTRACT_SUBTYPE	Spain

Field	Lookup	Legislation
Contract Replacement Reason	ES_CONTRACT_REPLACEMENT_REASON	Spain
Worker Status	ES_WORKER_STATUS	Spain
Unemployment Status	ES_UNEMPLOYMENT_STATUS	Spain
Special Relationship Type	ES_SPECIAL_RELATIONSHIP_TYPE	Spain
Contract Start Reason	ES_CONTRACT_START_REASON_UDT	Spain
Payment Key	ES_PAYMENT_KEY	Spain
Sub Payment Key (for Payment Key B)	ES_SUB_PAYMENT_KEY_B	Spain
Sub Payment Key (for Payment Key F)	ES_SUB_PAYMENT_KEY_F	Spain
Sub Payment Key (for Payment Key G)	ES_SUB_PAYMENT_KEY_G	Spain
Sub Payment Key (for Payment Key H)	ES_SUB_PAYMENT_KEY_H	Spain
Sub Payment Key (for Payment Key L)	ES_SUB_PAYMENT_KEY_L	Spain
Contract Subtype	ES_CONTRACT_SUB_TYPE_UDT	Spain
State/UT	IN_STATES	India
Pin Code	IN_PIN_CODES	India
Bank Name	IN_BANK	India
Branch Name	IN_BANK_BRANCH	India
Account Type	IN_ACCOUNT_TYPE	India
Contribution Period	IN_ESI_CONTRIB_PERIOD	India
Currency Period	IN_FINANCIAL_YEAR	India
Remittance Month	IN_CALENDAR_MONTH	India
Nature of Injury	IN_INJURY	India
Disablement Level	IN_DISABLEMENT_LEVEL	India

Field	Lookup	Legislation
Type (Extra Contact Information)	IN_NOMINATION_TYPES	India
Residential Status	IN_RESIDENTIAL_STATUS	India
Religion	IN_RELIGION	India
Community	IN_COMMUNITY	India
Employer Classification	IN_ER_CLASS	India
Trust Classification	IN_PF_CLASSIFICATION	India
Office Type	IN_OFFICE_TYPES	India
Industry Classification	IN_IND_CLASS	India
Joy Type	IN_JOB_TYPE	India
Governorate	KW_GOVERNORATE	Kuwait
Employment Status	KW_EMPLOYMENT_STATUS	Kuwait
Banks	KW_BANKS	Kuwait
Company Types	KW_COMPANY_TYPE	Kuwait

Adding Lookup Types and Values

To create a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type, use the Application Utilities Lookups window.

Note: You must log out and log in again to see the effect of your changes.

Defining Lookup Types

You can create your own lookup types to provide lists of values, for example to validate element entries.

To define a new lookup type and lookup values:

1. Choose the access level for the lookup type.
2. Enter the lookup type.
3. Enter the user name of the lookup. This is the name that users will see from within the application.

Note: For US Federal users: Do not prefix EIT definitions with GHR_US. This prefix is reserved for the predelivered US Federal definitions.

4. Select the application in which the lookup will be used.

5. Optionally, add a description of the lookup type.
6. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.

Important: The Global Security Group check box only displays if you are using Security Group Enabled Security with a non-default security group. If you use Standard HRMS security, or the default (Standard) security group in Security Group Enabled Security, all lookup types are global.

See: Categorizing Information By Security Groups, page 1-13

7. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.

If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

8. Save your work.

Defining Lookup Values

To add lookup values to an existing lookup type:

1. Query the lookup type to which you want to add a value.

You cannot add values if the access level is System.

2. If you want to add lookup values specific to the security group/business group linked to your current responsibility, un-check the Global Security Group check box. Existing lookup values are available to all business groups.

Important: The Global Security Group check box only displays if you are using Security Group Enabled Security with a non-default security group. If you use Standard HRMS security, or the default (Standard) security group in Security Group Enabled Security, all lookup types are global.

3. Enter the code, meaning and optionally a description for each value. Leave the Tag column blank.

Caution: Do not change or remove any legislation codes that are shown in the Tag column for existing lookup values. This may have implications elsewhere in your HRMS system.

If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.

4. Save your work.

Removing Lookup Values

You can only remove lookup values if they are set up for a specific security group. However, you can stop all lookups appearing in lists of values.

Note: You must be using Security Group Enabled security to categorize lookups by security groups. See: Categorizing Information By Security Groups, page 1-13

To remove a user defined lookup:

In the Application Utilities Lookups window, do one of the following:

- Enter an end date if you want to prevent users selecting this value after a certain date.
- Disable the code by un-checking the Enabled check box if you want to prevent users selecting this value with immediate effect from the current date.
- Change the meaning and description to create a replacement lookup.

If you add, disable, or change the meaning of a lookup, users must log out and log back in again for your changes to take effect.

To remove a lookup set up for a security group:

1. In the Application Utilities Lookups window, select the lookup type which has lookups for a specific security group.
2. Check the Global Security Group check box.

This removes all lookups which have been set up for the security group linked to your current responsibility. Predefined lookups are not removed.

If you add, disable, or change the meaning of a lookup, users must log out and log back in again for your changes to take effect.

User Types and Statuses

User Types and Statuses Window

The User Types and Statuses window enables you to extend certain delivered Oracle lookups to meet additional system requirements by creating user types and statuses for these lookups.

Note: If you wish to use user types or statuses, you must modify your program code to point to enable user types or statuses for the relevant fields. However, Oracle recommends that you only use the User Types and Statuses form as described in the examples below.

You can define user types for specific business groups if required. If you do not define specify a business group, your user types and statuses will be available in all business groups.

Using the User Types and Statuses Window

You would like to categorize the white collar workers in the organization according to their function. However, the delivered Employee Category lookup type contains only one value for white-collar worker. To further extend the possible values of this lookup, you can create the following additional user values for the WHITE_COLLAR lookup of the EMPLOYEE_CATG lookup type:

- Office Clerk
- Office Manager
- Administration Staff

For more information on lookups in general, see: Lookups, page 3-42

Specific Applications of the User Types and Statuses Window

There are additional help topics available which illustrate specific uses of the User Types and Statuses window:

- To create position hiring statuses. Although several hiring statuses are delivered with Oracle HRMS, you can create multiple values for each system status if required.

For more information, see: *Position Hiring Statuses, Oracle HRMS Enterprise and Workforce Management Guide*

- To create budget measurement types.

For more information, see: *People Budgets and Costing Overview, Oracle HRMS Enterprise and Workforce Management Guide*

Some Oracle localizations also use the User Types and Statuses window. For example, Oracle HRMS for France uses the User Types and Statuses window to create additional information for contacts and collective agreements.

For more information on these applications, please see the following documentation:

- *Setting Up Dependent Child Contact Relationships, Workforce Sourcing, Deployment, and Talent Management Guide*
- *Setting Up Collective Agreement Entitlement Items, Oracle HRMS Enterprise and Workforce Management Guide*

Note: Please note that the above examples are specific to the French localization of Oracle HRMS and you should only use the User Types and Statuses window as described in the examples above.

Creating User Types and Statuses

You use the User Types and Statuses window to create user types and statuses for delivered standard lookups.

1. In the Name field, select the lookup type. For example, select the EMPLOYEE_CATG lookup.
2. If applicable, select a business group. If you do not specify a business group, the user type or status will be available globally.
3. In the System Type field, select the lookup value that you wish to extend. For example, select the White Collar system type.
4. Enter a description of the new user type or status. For example, enter Office Clerk as a description.
5. Enter a code for the new user type or status.
6. Save your work.

You can enter additional values for each user type or status if required. For example, you may choose to create a further type or status for the White Collar lookup value such as Office Manager.

Alerts

Oracle HRMS Predefined Alerts

Use the Oracle HRMS Alerts to help you manage your enterprise and workforce more efficiently. Use the predefined alerts to inform, remind and confirm to you information on your personal details, your subordinate workforce and your organizations. For example, you could run HRMS Alert - New Hire Details Missing to ensure that you have all of the correct information for any newly hired employees.

See the *Oracle Alert's User Guide* for information on using and setting up the alerts.

The recipient of the alert is the person who meets the alert's requirements, usually a supervisor with a subordinate workforce. The recipient is sometimes required to perform an action based on the alert's email message, for example, if a piece of information is incorrect or missing and needs updating.

Configurable Options

Each of the HRMS alerts has been designed as a periodic alert with a set of predefined and configurable conditions. To view the configurable conditions and their descriptions, query the desired alert in the Alerts window. You can configure the conditions and determine how often you need the alerts run to suit your organizational needs. The alerts will check your database for these conditions according to the frequency you define.

See: Conditions of the HRMS Alerts, page 3-80

The table below describes each predefined alert with its specific business benefit, recommended frequency and any further information of when the alert sends an email notification to the recipient. An email will only be sent if the recipient meets the alert's requirements, the fixed and configurable conditions, and has a correctly formatted email address.

Warning: Oracle HRMS only supports the default select statement in the Alerts window if it is unchanged.

Period Conditions

For alerts that are based on events, for example a new hire or a termination, you can use the following configurable conditions to control whether your alerts report on a specific day or over a range of days:

- **PERIOD_EVT_IN_X_DAYS** - setting this value configures alerts to detect events that occurred X days ago or will occur in X days time. For example, if you set this to 7 for an alert that detects events in the future, when the alert is run, it will look for events that will occur in 7 days time.
- **PERIOD_RERUN_EVENT_DAYS** - setting this value configures alerts to detect events that occurred or will occur during a number of days before the value set in the PERIOD_EVT_IN_X_DAYS condition. For example, if PERIOD_EVT_IN_X_DAYS is set to 7, and PERIOD_RERUN_EVENT_DAYS is set to 3, then for an alert that detects events in the future, it will look for events that will occur between 4 and 7 days from the current date. For alerts that detect events that have already happened, the above settings would mean an alert looks for events that occurred between 7 and 10 days before the current date.

For a future event, a new hire that is due to start work, you can use the HRMS Alert - New Hires (not yet started) to find out how many new hires are about to start work and when. For example, if the current date is 01-AUG-2003, and you set the value in the PERIOD_EVT_IN_X_DAYS condition to 14, the alert will return a list of new hires that are due to start on the 15-AUG-2003. If you set the frequency of this alert to run daily, it will run everyday from the 15-AUG-2003 and will send an email notification if it finds any new hires.

If you want the alert to return a list of new hires before the 15-AUG-2003, for example you have set the alert to run as above and you need to find out if any new hires are due to start between the 07-AUG-2003 and the 15-AUG-2003, you can set the value in the PERIOD_RERUN_EVENT_DAYS condition to 8. The alert will run in the period between the value set in the PERIOD_EVT_IN_X_DAYS condition and the value set in the PERIOD_RERUN_EVENT_DAYS condition, therefore an email notification will be sent if the alert finds any new hires that are due to start between the 07-AUG-2003 and 15-AUG-2003.

For a past event, an employee who has recently started employment, you can use the HRMS Alert - New Hire Details Missing to find out if they have any important information missing from their records. For example, if the current date is 28-DEC-2002, and you set the value in the PERIOD_EVT_IN_X_DAYS condition to 10, the alert will return a list of newly hired employees with missing information that started work on the 18-DEC-2002. If you set the frequency of this alert to run daily, it will run everyday from the 18-DEC-2002 and will send an email notification if it finds any newly hired employees with missing details.

If you also want the alert to return a list of newly hired employees that started before the 18-DEC-2002, for example you need to find out if any new employees started between the 14-DEC-2002 and the 18-DEC-2002, you can set the value in the PERIOD_RERUN_EVENT_DAYS condition to 4. The alert will run in the period between the value set in the PERIOD_EVT_IN_X_DAYS condition and the value set in the PERIOD_RERUN_EVENT_DAYS condition, therefore an email notification will be sent if the alert finds any newly hired employees with information missing from their records between the 14-DEC-2002 and the 18-DEC-2002.

Predefined Alerts Table

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Active Direct Reports - this alert returns a list of subordinates and their assignment details.	Monthly	Use this alert to ensure that the information on your workforce is correct.	This alert sends an email only if it identifies active employees and contingent workers with current assignments.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Cost Center Listing by Manager - this alert returns a list of cost centers managed by the recipient and the recipient's subordinates.	Monthly	Use this alert to ensure that the list of cost centers that you and your subordinates manage is accurate.	This alert sends an email only if it identifies organizations that are currently classified as company cost centers to a current cost center manager, who is either an employee or contingent worker.
HRMS Alert - Ended Cost Center Listing by Manager - this alert returns a list of end-dated cost centers managed by the recipient and the recipient's subordinates.	Monthly	Use this alert to inform you of any cost centers that have been end-dated that you or your subordinates manage. You can then use this information to update your records.	This alert sends an email only if it identifies organizations that are classified as company cost centers, and that have been end-dated before the current date to a current cost center manager, who is either an employee or contingent worker.
HRMS Alert - New Hires (not yet started) - this alert returns a list of new members of the workforce that are due to start work.	Daily	Use this alert as a confirmation that new members of your workforce have been entered into the Oracle HRMS application, and as a reminder of their start date.	This alert sends an email only if it identifies employees or contingent workers who are due to start between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - New Hire Details Missing - this alert returns a list of missing information for newly hired employees, such as salary basis and bank details.	Daily	Use this alert to inform you of any important information that is missing from a newly hired employee's record, and to ensure that the information is updated.	This alert sends an email only if it identifies current employee or contingent worker assignments that started between the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.
HRMS Alert - Ending Probationary Period - this alert returns a list of the recipient's subordinates that are near the end of a review or probation period.	Daily	Use this alert to remind you when a member of your workforce is nearing the end of an employment review or probation period.	This alert sends an email only if it identifies current employee assignments that have probation periods that are due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Performance Appraisal Due - this alert returns a list of the recipient's subordinates that require appraisals.	Daily	Use this alert to remind you when a member of your workforce is due an appraisal.	This alert sends an email only if it identifies active employees that have an appraisal due between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not be sent if an appraisal of the same appraisal type has already occurred.
HRMS Alert - Performance Appraisal Passed Due - this alert returns a list of the recipient's subordinates that have appraisals outstanding.	Daily	Use this alert to remind you when a member of your workforce is overdue an appraisal.	This alert sends an email only if it identifies active employees that were due an appraisal from the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not be sent if an appraisal of the same appraisal type has already occurred.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Overlapping Position Incumbency - this alert returns a list of the recipient's subordinates that are in positions where there is an unacceptable position incumbency overlap due to occur.	Daily	Use this alert to warn you when members of your workforce are in positions where there is an unacceptable position incumbency due to occur. You can then use this information to correct or update your records.	This alert sends an email only if it identifies employee assignments that occupy the same position, that has a maximum headcount of one and the maximum overlap duration (for that position) is due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. The alert will not include a position if it has two or more assignments assigned to it.
HRMS Alert - People Terminating in the Next Week - this alert returns a list of the recipient's terminating workforce one week before they leave.	Daily	Use this alert to remind you to perform any termination procedures and collect any company assets.	This alert sends an email only if it identifies an employee's or contingent worker's period of service or placement is due to end between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - People Returning from Leave of Absence - this alert returns a list of subordinates to the supervisor who are due to return from a suspended assignment.	Daily	Use this alert to inform you of your subordinate's return date.	This alert sends an email if it identifies active employee assignments that have a current status of Suspended and a future dated assignment change between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition with an assignment status of active.
HRMS Alert - Open Vacancies Listing - this alert returns a list of outstanding vacancies that are assigned to the recipient.	None	Use this alert to provide you with a list of outstanding vacancies that are assigned to you and require an action.	This alert sends an email only if it identifies active vacancies.
HRMS Alert - Personal Details Review - this alert returns details of the recipient's important personal information.	Bi-annually	Use this alert to review your important personal information to ensure it is correct.	This alert sends an email if it identifies active employee and contingent worker primary assignments.
HRMS Alert - People Without a Supervisor - this alert returns a list (to a nominated user) of all current employees and contingent workers that do not have a supervisor.	Monthly	Use this alert to ensure that all workers are assigned to a supervisor.	This alert sends an email only if it identifies active assignments without a direct or valid supervisor.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Payroll Run Completed - this alert returns a confirmation (to a nominated user) of the latest successful payroll run	Daily	Use this alert to confirm a successful payroll run.	This alert sends an email only if it identifies payroll actions that have a status of complete between the current date, and the number of days previous, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition.
HRMS Alert - People Without Email Addresses - this alert returns a list of the recipient's subordinates that do not have an email address.	Monthly	Use this alert to inform you of any subordinates that do not have a valid email address. Use this information to update your records.	This alert sends an email only if it identifies active employee and contingent worker primary assignments that do not have an email address or have an incorrectly formatted email address.

Alert Name and Description	Recommended Frequency	Business Benefits	Further Information
HRMS Alert - Training Attendance Reminder - this alert returns a list of training events that the recipient or their subordinates are due to attend or have attended.	Daily	Use this alert to remind you of any training events that you or your subordinates are due to attend or to inform you of any training events that you or your subordinates have attended.	This alert sends an email only if it identifies active employee or contingent worker delegate assignments that are due to attend a training event or have previously attended a training event between the days you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. A training event will only be included if it is not a development event and if it has not been cancelled.
HRMS Alert - Workers Competencies Expiring - this alert returns a list of competencies that the recipient and their subordinates have that are due to expire.	Daily	Use this alert to remind you of any competencies that you or your subordinates have that are due to expire.	This alert sends an email only if it identifies active employees or contingent workers that have competencies that are due to expire between the current date, and the number of days ahead, which you indicate in the PERIOD_EVT_IN_X_DAYS condition, and the number of days before that, which you indicate in the PERIOD_RERUN_EVENT_DAYS condition. An email will not be sent if the competence is due to restart the day after it expires.

Using the Alerts

For information on using the alerts see the *Oracle Alert's User Guide*.

For an example of how to use a HRMS alert, see: Example of Setting up a HRMS Alert, page 3-82.

For information on the configurable conditions for the alerts, see: Conditions of the HRMS Alerts, page 3-80.

Conditions of the HRMS Alerts

The conditions of the alerts enable you to control the content of the alert and who receives them. Each alert provides you with a number of configurable options that you can configure to provide email notifications to best suit your organizational needs. For example, if you want to send the HRMS Alert - Training Attendance Reminder to the supervisor of an employee that is due to attend a training course, you can set the value of the SEND_TO_ASG_SPVSR condition to Y. When the alert is run, an email notification is sent to the supervisor regarding the training event.

The table below describes each condition and its default value.

The HRMS Alerts Conditions Table

Condition	Default Values	Description
ALERT_BANK_DETAILS	Y	If set to Y an alert will be raised when bank details have not been set for a new hire.
ALERT_GRADE_PLACEMENT_MISSING	N	If set to Y an alert will be raised when grade placements have not been set for a new hire.
ALERT_PAY_METHOD_MISSING	Y	If set to Y an alert will be raised when the pay method has not been set for a new hire.
ALERT_PAYROLL_MISSING	Y	If set to Y an alert will be raised when the payroll has not been set for a new hire.
ALERT_SALARY_BASIS_MISSING	Y	If set to Y an alert will be raised when the salary basis has not been set for a new hire.
ALERT_SALARY_MISSING	Y	If set to Y an alert will be raised when the bank details have not been set for a new hire.
ALERT_SUPERVISOR_MISSING	N	If set to Y an alert will be raised when a new hire does not have a supervisor.
DISPLAY_SALARY_AMOUNT	N	If set to Y the actual salary amount displays on the alert.
EXCLUDE_CEO	Blank	If set to an employee number, that employee will be excluded from the alert, if blank then all employees will be considered within the scope of the alert.

Condition	Default Values	Description
INCLUDE_ALL_NEW_STARTS	N	If set to Y an alert will be raised for all new hires regardless of whether they have missing details or not.
INCLUDE_BUSINESS_GROUP	Blank	Restricts the alert to a named business group. If not set, all business groups will display.
INCLUDE_CONT_FLAG	N	Includes contingent workers within the scope of the alert.
INCLUDE_EMP_FLAG	Y	Includes employees in the scope of the alert.
INCLUDE_ORGANIZATION	Blank	Restricts the alert to a named organization. If not set, all organizations will display.
INCLUDE_SECONDARY_ASG	N	If set to Y an alert will include information for a secondary assignment.
PERIOD_EVT_IN_X_DAYS	7	Set the alert to X number of days before or after an event.
PERIOD_RERUN_EVENT_DAYS	0	Allows a rerun of the alert and provides an additional configuration option to run the alert for a period of time rather than a single day.
*SEND_TO_ASG_PSN	Y	Send alert to the person (with an assignment) who is the subject of the alert.
*SEND_TO_ASG_SPVSR	Y	Send alert to the supervisor of the person (with an assignment) who is the subject of the alert.
*SEND_TO_NAMED_USER	N	Send a copy of the alert to the specified email address.
*SEND_TO_PASG_SPVSR	N	Send alert to the primary assignment supervisor of the person who is the subject of the alert.
*SEND_TO_PSN	Y	Send alert to the person who is the subject of the alert.
*SEND_TO_SUP_PSN	N	Send alert to the supervisor of the person who is the subject of the alert.

Warning: If you set more than one of the *Send_To condition values to Y, the recipient of the alert may receive duplicate information in the alert notification.

Example of Setting up a HRMS Alert

This topic is an example of the steps you perform to set up the HRMS Alert - Cost Center Listing by Manager.

To set up the HRMS Alert - Cost Center Listing by Manager:

1. Query the HRMS Alert - Cost Center Listing by Manager in the Alerts window.
2. Choose Tools in the menu, and select the Transfer Alert option to copy the alert.

See: Transferring Alert Definitions in the *Oracle Alert's User Guide* for more information on copying an alert.

3. Ensure you rename the alert and choose the same database in the Destination Alert region of the Transfer Alert Definition window.

Note: It is important to rename your alerts and to save them to the same database. This ensures that any changes you make to the alert are specific to your alert and not the predefined alert.

4. Choose the Transfer button, close the Transfer Alert Definitions window and query your copied alert.
5. Check the Enabled button to enable your alert.

You can check your periodic alerts regardless of the frequency you define. See: Checking a Periodic Alert in the *Oracle Alert's User Guide* for information on checking your periodic alerts and their enabled action sets.

6. Set the frequency to On Day of the Month and enter 1 as the day number for the alert to run on the first day of every month.

See: Creating a Periodic Alert in the *Oracle Alert's User Guide* for more information on setting up the frequency.

7. Choose the Action Details button to set up the conditions of the alert. The conditions you set up here specify the scope of the alert.

See: Specifying the Alert Details in the *Oracle Alert's User Guide* for more information.

8. Enter the business group name in the Value field for the INCLUDE_BUSINESS_GROUP optional condition for which you want the alert to run.

Warning: You must enter a valid value for the alert to run successfully. For example, if you enter an invalid business group name, the alert will not find any information and an email notification will not be sent.

9. Change the INCLUDE_CONT_FLAG condition to Y in the Value field to include contingent workers in the scope of the alert.

Warning: The Value field is case sensitive, you must ensure that you enter the value as uppercase.

10. Leave the INCLUDE_ORGANIZATION condition blank in the Value field, as this example wants the alert to include all organizations within the business group in the scope of the alert.

Note: You can restrict this condition to a specific organization if you enter an organization name.

11. Leave all other conditions with their default values.

As an additional verification step, you can set the conditions up in the Alert Details window with the same values as in the Action Details window, to test your alert to find out if it returns the number of rows you expect. You use the Run button to test and verify your alert.

See: Creating a Periodic Alert in the *Oracle Alert's User Guide* for more information on verifying your alerts.

This alert now runs on the first day of every month, and sends an email notification to employees and contingent workers if it identifies them as current company cost center managers within the specified business group.

Custom Library Events and APIs

CUSTOM Library Events

Generic Events

An event is a point within the processing of a form at which you can call custom code from the CUSTOM library. For example, you can use the event WHEN-FORM-NAVIGATE to code a sequence of logic that occurs after any existing logic for the form, block or item. WHEN-FORM-NAVIGATE is an example of a generic event available to all the windows in Oracle Applications. For a complete list of generic events see: Events Passed to the CUSTOM Library, *Oracle Applications Developer's Guide*.

Product-Specific Events

In addition to generic events, Oracle HRMS provides a range of product-specific events that you can use to make CUSTOM library calls to support your business rules. The product-specific events for HRMS are available for most HRMS windows. The following table details the purpose of each event and shows when the events occur.

Event Name	Purpose	When Occurs
WHEN-CREATE-RECORD	Enables you to specify values that will appear by default when you create a new record.	After the form has processed.
POST-QUERY	Enables you to add additional derivation or validation on completion of a query.	After the form has processed.
KEY-DELREC	Enables you to add an extra level of validation before users are allowed to delete a record from the database.	Immediately before the user is asked to confirm the deletion of the record.
PRE-UPDATE, PRE-INSERT and PRE-DELETE	Enables you to add additional validation before the update, insert or delete action is performed.	After any data validation. Before DateTrack manipulation if the block contains DateTrack features.
POST-INSERT, POST-UPDATE and POST-DELETE	Enables you to add additional insert, update, or delete actions to user tables. We do not recommend using these events for validation.	After the form has processed.
POST-FORMS-COMMIT	Enables you to specify an action to occur as the last action in a sequence of commit actions.	After the form has processed.

Event Name	Purpose	When Occurs
WHEN-BUTTON-PRESSED	Enables you to perform custom validation before a button action is performed.	After any data validation. Before any action (for example, display new window) has been performed.
DT_CALL_HISTORY	Enables you to change which database view is used by DateTrack History.	After the user has requested to use DateTrack History and the form has derived the standard details. Before the DateTrack History window is visible.
DT_SELECT_MODE	Enables you to restrict the DateTrack modes that a user can select.	After the form has derived which DateTrack modes are available but before the mode selection window is visible.
NAVIGATE	Enables you to supplement the validation that takes place when the user selects a task flow navigation option. The following field values are set for the duration of this event: CTL_GLOBALS.DESTINATION_FORM CTL_GLOBALS.DESTINATION_BLOCK	After the user selects a task flow navigation option but before the new window opens.

Publicly Callable Business Process APIs in Oracle HRMS

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The Oracle HRMS API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

Further information on the purpose of each API is available in the API package header. For information on how to call APIs, see the technical essay *APIs in Oracle HRMS, Oracle HRMS Implementation Guide*. See also the *Oracle Applications System Administrator's Guide*.

See also:

- Publicly Callable Business Process APIs in iRecruitment, *Oracle iRecruitment Implementation Guide*
- Publicly Callable Business Process APIs in Oracle Training Administration, *Implementing Oracle Learning Management*
- Publicly Callable Business Process APIs in Oracle Time & Labor, *Oracle Time & Labor Implementation and User Guide*
- HR Foundation, page 3-149 (for a list of APIs supported in HR Foundation)

The following table shows the APIs delivered with Oracle HRMS.

Important: This list includes all the supported APIs in Oracle HRMS, including HR, Payroll, and Standard and Advanced

Benefits. Any APIs not included in this list are for internal use only and are *not* supported.

Business Process APIs in Oracle HRMS

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ben_cwb_stock_optn_dtls_api	becsoapi.pkh	create_cwb_stock_optn_dtls	No	Yes	WW
ben_cwb_stock_optn_dtls_api	becsoapi.pkh	delete_cwb_stock_optn_dtls	No	Yes	WW
ben_cwb_stock_optn_dtls_api	becsoapi.pkh	update_cwb_stock_optn_dtls	No	Yes	WW
ghr_agency_appeals_api	ghcaaapi.pkh	create_agency_appeal, update_agency_appeal, delete_agency_appeal	No	Yes	FD
ghr_assignment_api	ghasgapi.pkh	accept_apl_asg	No	No	FD
ghr_complainant_appeals_api	ghccaapi.pkh	create_complainant_appeal, update_complainant_appeal, delete_complainant_appeal	No	Yes	FD
ghr_complaint_adrs_api	ghcadapi.pkh	create_compl_adr, update_compl_adr, delete_compl_adr	No	Yes	FD
ghr_complaint_api	ghcmpapi.pkh	create_complaint, update_complaint	No	Yes	FD

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ghr_complaint_bases_api	ghcbaapi.pkh	create_compl_basis, update_compl_basis, delete_compl_basis	No	Yes	FD
ghr_complaint_claims_api	ghcclapi.pkh	create_compl_claim, update_compl_claim, delete_compl_claim	No	Yes	FD
ghr_complaint_incidents_api	ghcinapi.pkh	create_compl_incident, update_compl_incident, delete_compl_incident	No	Yes	FD
ghr_complaint_people_api	ghcplapi.pkh	create_compl_person, update_compl_person, delete_compl_person	No	Yes	FD
ghr_complaints_ca_details_api	ghcdtapi.pkh	create_ca_detail, update_ca_detail, delete_ca_detail	No	Yes	FD
ghr_complaints_ca_headers_api	ghcahapi.pkg	create_ca_header, update_ca_header, delete_ca_header	No	Yes	FD
ghr_duty_station_api	ghdutapi.pkh	create_duty_station, delete_duty_station, update_duty_station	No	Yes	FD
ghr_element_api	ghelepkg.pkh	process_sf52_element	No	No	FD

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
ghr_noac_ las_api	ghnlaapi.pkh	create_noac_ las, delete_ noac_las, update_noac_ las	No	Yes	FD
ghr_noac_ remarks_api	ghnreapi.pkh	create_noac_ remarks, delete_noac_ remarks, update_noac_ remarks	No	Yes	FD
ghr_pa_ remarks_api	ghpreapi.pkh	create_pa_ remarks, delete_pa_ remarks, update_pa_ remarks	No	Yes	FD
ghr_par_ extra_info_ api	ghreiapi.pkh	create_pa_ request_ extra_info, delete_pa_ request_ extra_info, update_pa_ request_ extra_info	No	Yes	FD
ghr_pdc_api	ghpdapi.pkh	create_pdc, delete_pdc, update_pdc	No	Yes	FD
ghr_pdi_api	ghpdapi.pkh	create_pdi, update_pdi	No	Yes	FD
ghr_person_ address_api	ghaddapi.pkh	create_us_ int_person_ address	No	No	FD
ghr_person_ address_api	ghaddapi.pkh	update_us_ int_person_ address	No	No	FD
ghr_sf52_api	ghparapi.pkh	create_sf52, end_sf52, update_sf52	No	Yes	FD
hr_accrual_ plan_api **	hrpapapi.pkh	create_ accrual_plan	No	Yes	WW
hr_accrual_ plan_api **	hrpapapi.pkh	delete_ accrual_plan	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_accrual_plan_api **	hrpapapi.pkh	update_accrual_plan	No	Yes	WW
hr_api_hook_call_api	peahcapi.pkh	create_api_hook_call	No	No	WW
hr_api_hook_call_api	peahcapi.pkh	update_api_hook_call	No	No	WW
hr_api_hook_call_api	peahcapi.pkh	delete_api_hook_call	No	No	WW
hr_applicant_api	peappapi.pkh	convert_to_applicant	No	Yes	WW
hr_applicant_api	peappapi.pkh	create_applicant	Yes	Yes	WW
hr_applicant_api	peappapi.pkh	create_gb_applicant	Yes	No	UK
hr_applicant_api	peappapi.pkh	create_us_applicant	Yes	No	FD
hr_applicant_api	peappapi.pkh	hire_applicant	Yes	Yes	WW
hr_applicant_api	peappapi.pkh	terminate_applicant	No	Yes	WW
hr_application_api	peaplapi.pkh	update_apl_details	No	Yes	WW
hr_appraisal_templates_api	peaptapi.pkh	create_appraisal_template, delete_appraisal_template, update_appraisal_template	No	Yes	WW
hr_appraisals_api	peaprapi.pkh	create_appraisal, delete_appraisal, update_appraisal	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_asg_budget_value_api	peabvapi	create_assignment_budget_value, update_assignment_budget_value, delete_assignment_budget_value	No	Yes	WW
hr_assessment_groups_api	peasrapi.pkh	create_assessment_group, delete_assessment_group, update_assessment_group	No	Yes	WW
hr_assessment_types_api	peastapi.pkh	create_assessment_type, delete_assessment_type, update_assessment_type	No	Yes	WW
hr_assessments_api	peasnapi.pkh	create_assessment, delete_assessment, update_assessment	No	Yes	WW
hr_assignment_api	peasgapi.pkh	accept_apl_asg,	No	Yes	WW
hr_assignment_api	peasgapi.pkh	activate_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	activate_cwk_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	activate_emp_asg	Yes	Yes	WW
hr_assignment_api	peasgapi.pkh	actual_termination_emp_asg	Yes	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_assignment_api	peasgapi.pkh	create_gb_secondary_emp_asg	Yes	No	UK
hr_assignment_api	peasgapi.pkh	create_secondary_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	create_secondary_cwk_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	create_secondary_emp_asg	Yes	Yes	WW
hr_assignment_api	peasgapi.pkh	create_us_secondary_emp_asg	Yes	No	US
hr_assignment_api	peasgapi.pkh	final_process_emp_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	interview1_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	interview2_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	offer_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	set_new_primary_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	set_new_primary_cwk_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	suspend_cwk_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	suspend_emp_asg	Yes	Yes	WW
hr_assignment_api	peasgapi.pkh	terminate_apl_asg	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_assignment_api	peasgapi.pkh	update_apl_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	update_cwk_asg	No	Yes	WW
hr_assignment_api	peasgapi.pkh	update_cwk_asg_criteria	No	Yes	WW
hr_assignment_api	peasgapi.pkh	update_emp_asg	Yes	Yes	WW
hr_assignment_api	peasgapi.pkh	update_emp_asg_criteria	Yes	Yes	WW
hr_assignment_api	peasgapi.pkh	update_gb_emp_asg	Yes	No	UK
hr_assignment_api	peasgapi.pkh	update_us_emp_asg	Yes	No	US
hr_assignment_extra_info_api	peaeiapi.pkh	create_assignment_extra_info, delete_assignment_extra_info, update_assignment_extra_info	No	Yes	WW
hr_au_applicant_api	hrauwraa.pkh	create_au_applicant	Yes	No	AU
hr_au_assignment_api	hrauwrsa.pkh	create_au_secondary_emp_asg, update_au_emp_asg	Yes	No	AU
hr_au_employee_api	hrauwree.pkh	create_au_employee	Yes	No	AU
hr_au_person_api	hrauwre.pkh	update_au_person	Yes	No	AU

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_au_personal_pay_method_api	hrauwrpm.pkh	create_au_personal_pay_method, update_au_personal_pay_method	Yes	Yes	AU
hr_au_super_api	hrauwrsu.pkh	create_super_contribution, update_super_contribution	Yes	No	AU
hr_au_tax_api	hrauwrpx.pkh	maintain_paye_tax_info, maintain_super_info	Yes	No	AU
hr_authoria_mapping_api	hrammapi.pkh	create_authoria_mapping	No	Yes	UK, US
hr_authoria_mapping_api	hrammapi.pkh	delete_authoria_mapping	No	Yes	UK, US
hr_authoria_mapping_api	hrammapi.pkh	update_authoria_mapping	No	Yes	UK, US
hr_batch_message_line_api	hrabmapi.pkh	create_message_line	No	No	WW
hr_batch_message_line_api	hrabmapi.pkh	delete_message_line	No	No	WW
hr_batch_message_line_api	hrabmapi.pkh	delete_batch_lines	No	No	WW
hr_be_contract_api	hrctcbei.pkh	create_be_contract, update_be_contract	No	No	BE
hr_be_employee_api	peempbei.pkh	create_be_employee	No	No	BE
hr_ca_applicant_api	peappcai.pkh	create_ca_applicant	No	No	CA

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_ca_assignment_api	peasgcai.pkh	create_ca_secondary_emp_asg, update_ca_emp_asg	No	No	CA
hr_ca_employee_api	peempcai.pkh	create_ca_employee	No	No	CA
hr_cagr_entitlement_api	peceiapi.pkh	create_cagr_entitlement_item, update_cagr_entitlement_item, delete_cagr_entitlement_item	No	Yes	WW
hr_cagr_entitlement_lines_api	pepclapi.pkh	create_cagr_entitlement_line, update_cagr_entitlement_line, delete_cagr_entitlement_line	No	Yes	WW
hr_cagr_entitlement_api	pepceapi.pkh	create_cagr_entitlement, update_cagr_entitlement, delete_cagr_entitlement	No	Yes	WW
hr_cagr_grade_structures_api	pegrsapi.pkh	create_cagr_grade_structures, delete_cagr_grade_structures	No	Yes	WW
hr_cagr_grade_structures_api	pegrsapi.pkh	update_cagr_grade_structures	No	No	WW
hr_cagr_grades_api	pegraapi.pkh	create_cagr_grades, delete_cagr_grades, update_cagr_grades	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_cagr_parameter_api	pecpaapi.pkh	create_cagr_parameter	No	No	WW
hr_cagr_parameter_api	pecpaapi.pkh	delete_cagr_parameter	No	No	WW
hr_cagr_parameter_api	pecpaapi.pkh	update_cagr_parameter	No	No	WW
hr_cancel_hire_api	pecahapi.pkh	cancel_hire	No	Yes	WW
hr_cancel_placement_api	pecplapi.pkh	cancel_placement	No	No	WW
hr_change_start_date_api	pehirapi.pkh	update_start_date	No	Yes	WW
hr_cn_applicant_api	hrcnwraa.pkh	create_cn_applicant	Yes	No	CN
hr_cn_assignment_api	hrcnwras.pkh	create_cn_secondary_emp_asg	Yes	No	CN
hr_cn_assignment_api	hrcnwras.pkh	update_cn_emp_asg	Yes	No	CN
hr_cn_contact_api	hrcnwrcc.pkh	create_cn_person	No	No	CN
hr_cn_employee_api	hrcnwree.pkh	create_cn_employee	Yes	No	CN
hr_cn_personal_pay_method_api	hrcnwrpm.pkh	create_cn_personal_pay_method	Yes	No	CN
hr_cn_personal_pay_method_api	hrcnwrpm.pkh	update_cn_personal_pay_method	Yes	No	CN
hr_cn_person_address_api	hrcnwrpa.pkh	create_cn_person_address	Yes	No	CN

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_cn_person_address_api	hrcnwrpa.pkh	update_cn_person_address	Yes	No	CN
hr_cn_person_api	hrcnwrpe.pkh	update_cn_person	Yes	No	CN
hr_collective_agreement_api	hrcagapi.pkh	attach_plan_years	No	No	WW
hr_collective_agreement_api	hrcagapi.pkh	create_collective_agreement, delete_collective_agreement, update_collective_agreement	No	Yes	WW
hr_comp_element_outcome_api	peceoapi.pkh	create_element_outcome, update_element_outcome	Yes	Yes	WW
hr_comp_element_outcome_api	peceoapi.pkh	delete_element_outcome	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	copy_competencies	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	create_competence_element	Yes*	Yes	WW
hr_competence_element_api	pecelapi.pkh	delete_competence_element	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	maintain_student_comp_element	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	update_competence_element	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_competence_element_api	pecelapi.pkh	update_delivered_dates	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	update_personal_comp_element	No	Yes	WW
hr_competence_outcome_api	peceoapi.pkh	create_outcome, update_outcome	Yes	Yes	WW
hr_competence_outcome_api	peceoapi.pkh	delete_outcome	No	Yes	WW
hr_competences_api	pecpnapi.pkh	create_competence	Yes	Yes	WW
hr_competences_api	pecpnapi.pkh	delete_competence	No	Yes	WW
hr_competences_api	pecpnapi.pkh	update_competence	Yes	Yes	WW
hr_contact_api	peconapi.pkh	create_person	Yes	Yes	WW
hr_contact_extra_info_api	pereiapi.pkh	create_contact_extra_info	No	Yes	WW
hr_contact_extra_info_api	pereiapi.pkh	delete_contact_extra_info	No	Yes	WW
hr_contact_extra_info_api	pereiapi.pkh	update_contact_extra_info	No	Yes	WW
hr_contact_rel_api	pecrlapi.pkh	create_contact	Yes	Yes	WW
hr_contact_rel_api	pecrlapi.pkh	delete_contact_relationship	No	Yes	WW
hr_contact_rel_api	pecrlapi.pkh	update_contact_relationship	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_contingent_worker_api	pecwkapi.pkh	apply_for_job	No	Yes	WW
hr_contingent_worker_api	pecwkapi.pkh	convert_to_cwk	No	Yes	WW
hr_contingent_worker_api	pecwkapi.pkh	create_cwk	No	Yes	WW
hr_contingent_worker_api	pecwkapi.pkh	reverse_terminate_placement	No	Yes	WW
hr_contingent_worker_api	pecwkapi.pkh	terminate_placement	No	Yes	WW
hr_contract_api	hrctcapi.pkh	create_contract	Yes	Yes	WW
hr_contract_api	hrctcapi.pkh	delete_contract	No	Yes	WW
hr_contract_api	hrctcapi.pkh	update_contract	No	Yes	WW
hr_de_assignment_api	peasgdei.pkh	create_de_secondary_emp_asg	No	No	DE
hr_de_assignment_api	peasgdei.pkh	update_de_emp_asg	No	No	DE
hr_de_employee_api	peempdei.pkh	create_de_employee	No	No	DE
hr_de_liability_premiums_api	hrlipapi.pkh	create_premium, update_premium, delete_premium	No	Yes	DE
hr_de_organization_links_api	hrordapi.pkh	create_link, update_link, delete_link	No	Yes	DE

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_de_soc_ins_cle_api	hrcleapi.pkh	create_soc_ins_contributions, update_soc_ins_contributions, delete_soc_ins_contributions	No	Yes	DE
hr_delivery_methods_api	pepdmapi.pkh	create_delivery_method, delete_delivery_method, update_delivery_method	No	Yes	WW
hr_deployment_factor_api	pedpfapi.pkh	create_person_dpmt_factor, update_person_dpmt_factor, create_position_dpmt_factor, update_position_dpmt_factor, create_job_dpmt_factor, update_job_dpmt_factor	No	Yes	WW
hr_elc_candidate_api	peecaapi.pkh	create_election_candidate, update_election_candidate, delete_election_candidate	No	Yes	WW
hr_elc_constituencys_api	peecoapi.pkh	create_election_constituency, update_election_constituency, delete_election_constituency	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_elc_result_api	peersapi.pkh	create_election_result, update_election_result	No	No	WW
hr_elections_api	peelcapi.pkh	create_election_information, update_election_information, delete_election_information	No	Yes	WW
hr_employee_api	peempapi.pkh	apply_for_internal_vacancy	No	Yes	WW
hr_employee_api	peempapi.pkh	create_employee	Yes	Yes	WW
hr_employee_api	peempapi.pkh	create_gb_employee	Yes	No	UK
hr_employee_api	peempapi.pkh	create_us_employee	Yes	No	US
hr_employee_api	peempapi.pkh	hire_into_job	No	Yes	WW
hr_employee_api	peempapi.pkh	re_hire_ex_employee	Yes	Yes	WW
hr_employee_api	peempapi.pkh	hire_employee_applicant	No	Yes	WW
hr_employee_api	peempapi.pkh	hire_to_employee_applicant	No	Yes	WW
hr_es_applicant_api	peappesi.pkh	create_es_applicant	No	No	ES
hr_es_contact_api	peconesi.pkh	create_es_person	No	No	ES
hr_es_contingent_worker_api	pecwkesi.pkh	create_es_cwk	No	No	ES

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_es_employee_api	peempesi.pkh	create_es_employee	No	No	ES
hr_es_person_api	peperesi.pkh	update_es_person	No	No	ES
hr_ex_employee_api	peexeapi.pkh	actual_termination_emp	Yes	Yes	WW
hr_ex_employee_api	peexeapi.pkh	final_process_emp	Yes	Yes	WW
hr_ex_employee_api	peexeapi.pkh	update_term_details_emp	Yes	Yes	WW
hr_fr_applicant_api	peappfri.pkh	create_fr_applicant	No	No	FR
hr_fr_assignment_api	peasgfri.pkh	create_fr_secondary_emp_asg	No	No	FR
hr_fr_assignment_api	peasgfri.pkh	update_fr_emp_asg	No	No	FR
hr_fr_contract_api	hrctcfri.pkh	create_fr_contract	No	No	FR
hr_fr_contract_api	hrctcfri.pkh	update_fr_contract	No	No	FR
hr_fr_employee_api	peempfri.pkh	create_fr_employee	No	No	FR
hr_fr_job_api	pejobfri.pkh	create_fr_job	No	No	FR
hr_fr_periods_of_service_api	pepdsfri.pkh	update_fr_pds_details	No	No	FR
hr_fr_pers_pay_method_api	peppmfri.pkh	create_fr_pers_pay_method	No	No	FR
hr_fr_pers_pay_method_api	peppmfri.pkh	update_fr_pers_pay_method	No	No	FR
hr_fr_person_address_api	peaddfri.pkh	create_fr_person_address	No	No	FR

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_fr_person_address_api	peaddfri.pkh	update_fr_person_address	No	No	FR
hr_fr_person_api	peperfri.pkh	update_fr_person	No	No	FR
hr_fr_pqh_employee_api	pqhpefri.pkh	create_fr_employee	No	No	FR
hr_grade_api **	pegrdapi.pkh	create_grade	Yes	No	WW
hr_grade_api **	pegrdapi.pkh	update_grade	No	No	WW
hr_grade_api **	pegrdapi.pkh	delete_grade	No	No	WW
hr_grade_rate_value_api **	pygrrapi.pkh	create_grade_rate_value	Yes	No	WW
hr_grade_rate_value_api **	pygrrapi.pkh	update_grade_rate_value	Yes	No	WW
hr_grade_rate_value_api **	pygrrapi.pkh	delete_grade_rate_value	No	No	WW
hr_grade_scale_api	pepgsapi.pkh	create_grade_scale delete_grade_scale update_grade_scale	No	Yes	WW
hr_grade_step_api	pespsapi.pkh	create_grade_step delete_grade_step update_grade_step	No	Yes	WW
hr_hierarchy_element_api	peoseapi.pkh	create_hierarchy_element	Yes	Yes	WW
hr_hierarchy_element_api	peoseapi.pkh	delete_hierarchy_element	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_hierarchy_element_api	peoseapi.pkh	update_hierarchy_element	No	Yes	WW
hr_hk_applicant_api	hrhkwraa.pkh	create_hk_applicant	Yes	No	HK
hr_hk_assignment_api	hrhkwras.pkh	create_hk_secondary_emp_asg, update_hk_emp_asg	Yes	No	HK
hr_hk_employee_api	hrhkwree.pkh	create_hk_employee	Yes	No	HK
hr_hk_person_api	hrhkwrpe.pkh	update_hk_person	Yes	No	HK
hr_hk_person_address_api	hrhkwropa.pkh	create_hk_person_address, update_hk_person_address	Yes	No	HK
hr_hk_personal_pay_method_api	hrhkwrpm.pkh	create_hk_personal_pay_method, update_hk_personal_pay_method	Yes	No	HK
hr_hu_applicant_api	peapphui.pkh	create_hu_applicant	No	No	HU
hr_hu_contact_api	peconhui.pkh	create_hu_person	No	No	HU
hr_hu_contingent_worker_api	pecwkhui.pkh	create_hu_cwk	No	No	HU
hr_hu_employee_api	peemphui.pkh	create_hu_employee	No	No	HU
hr_hu_person_api	peperhui.pkh	update_hu_person	No	No	HU
hr_in_assignment_api	peasgini.pkh	create_in_secondary_cwk_asg	Yes	No	IN

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_in_assignment_api	peasgini.pkh	create_in_secondary_emp_asg	Yes	No	IN
hr_in_assignment_api	peasgini.pkh	update_in_cwk_asg	Yes	No	IN
hr_in_assignment_api	peasgini.pkh	update_in_emp_asg	Yes	No	IN
hr_in_contact_extra_info_api	pereiini.pkh	create_in_contact_extra_info, update_in_contact_extra_info	Yes	No	IN
hr_in_contact_rel_api	pecrlini.pkh	create_in_contact	Yes	No	IN
hr_in_contact_rel_api	pecrlini.pkh	update_in_contact_relationship	Yes	No	IN
hr_in_employee_api	peempini.pkh	create_in_employee	Yes	No	IN
hr_in_location_api	pelocinii.pkh	create_in_location, update_in_location	Yes	No	IN
hr_in_person_address_api	peaddini.pkh	create_in_person_address, update_in_person_address	Yes	No	IN
hr_in_person_api	peperini.pkh	update_in_person	Yes	No	IN
hr_in_person_extra_info_api	pepeiini.pkh	create_in_passport_details, update_in_passport_details	Yes	No	IN

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_in_person_extra_info_api	pepeiini.pkh	create_in_person_extra_info, update_in_person_extra_info	Yes	No	IN
hr_it_employee_api	hrempti.pkh	create_it_employee	No	No	IT
hr_job_api	pejobapi.pkh	create_job	Yes	Yes	WW
hr_job_api	pejobapi.pkh	delete_valid_grades, update_valid_grades	No	No	WW
hr_job_requirement_api	pejbrapi.pkh	create_job_requirement	Yes	Yes	WW
hr_jp_person_api	pejppapi.pkh	update_jp_person	No	No	JP
hr_jpbp_api	pejpapi.pkh	create_jp_appl_with_educ_add, create_jp_applicant_with_sit, create_jp_educ_sit, create_jp_emp_with_educ_add, create_jp_employee_with_sit	No	No	JP
hr_ki_hierarchies_api	hrhrcapi.pkh	create_hierarchy_node, delete_hierarchy_node, update_hierarchy_node	No	Yes	WW
hr_ki_hierarchies_api	hrhrcapi.pkh	create_topic_hierarchy_map	No	Yes	WW
hr_ki_hierarchies_api	hrhrcapi.pkh	create_topic_ui_map	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_ki_hierarchies_api	hrhrcapi.pkh	create_ui_hierarchy_map	No	Yes	WW
hr_ki_hierarchies_api	hrhrcapi.pkh	delete_hierarchy_node_map, update_hierarchy_node_map	No	Yes	WW
hr_ki_integrations_api	hrintapi.pkh	create_integration, delete_integration, update_integration	No	Yes	WW
hr_ki_integrations_api	hrintapi.pkh	validate_integration	No	Yes	WW
hr_ki_options_api	hroptapi.pkh	create_option, delete_option, update_option	No	Yes	WW
hr_ki_option_types_api	hrotyapi.pkh	create_option_type, delete_option_type, update_option_type	No	Yes	WW
hr_ki_topics_api	hrtpcapi.pkh	create_topic, delete_topic, update_topic	No	Yes	WW
hr_ki_topic_integrations_api	hrtisapi.pkh	create_topic_integration, delete_topic_integration, update_topic_integration	No	Yes	WW
hr_ki_topic_integrations_api	hrtisapi.pkh	create_topic_integration_key, update_topic_integration_key	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_ki_user_interfaces_api	hriffapi.pkh	create_user_interface, delete_user_interface, update_user_interface	No	Yes	WW
hr_location_api	hrlocapi.pkh	create_location	Yes	Yes	WW
hr_location_api	hrlocapi.pkh	delete_location	No	Yes	WW
hr_location_api	hrlocapi.pkh	update_location	Yes	Yes	WW
hr_location_extra_info_api	hrleiapi.pkh	create_location_extra_info, delete_location_extra_info, update_location_extra_info	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	approve_salary_proposal	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	cre_or_upd_salary_proposal	No	No	WW
hr_maintain_proposal_api	hrpypapi.pkh	delete_proposal_component	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	delete_salary_proposal	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	insert_proposal_component	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	insert_salary_proposal	No	Yes	WW
hr_maintain_proposal_api	hrpypapi.pkh	update_proposal_component	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_maintain_proposal_api	hrpyapi.pkh	update_salary_proposal	No	Yes	WW
hr_nl_absence_action_api	penaaapi.pkh	create_absence_action, delete_absence_action, update_absence_action	No	Yes	NL
hr_nl_applicant_api	peempnli.pkh	create_nl_employee	No	No	NL
hr_nl_assignment_api	peasgnli.pkh	create_nl_secondary_emp_asg	No	No	NL
hr_nl_assignment_api	peasgnli.pkh	update_nl_emp_asg	No	No	NL
hr_nz_applicant_api	hrnzwrap.pkh	create_nz_applicant	Yes	No	NZ
hr_nz_assignment_api	hrnzwrea.pkh	create_nz_secondary_emp_asg, update_nz_emp_asg	Yes	No	NZ
hr_nz_employee_api	hrnzwree.pkh	create_nz_employee	Yes	No	NZ
hr_nz_person_address_api	hrnzwrpa.pkh	create_nz_person_address, update_nz_person_address	Yes	No	NZ
hr_nz_person_api	hrnzwrap.pkh	update_nz_person	Yes	No	NZ
hr_nz_personal_pay_method_api	hrnzwrpp.pkh	create_nz_personal_pay_method, update_nz_personal_pay_method	Yes	No	NZ

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_nz_tax_api	hrnzwrtx.pkh	maintain_tax_info	Yes	No	NZ
hr_objectives_api	peobjapi.pkh	create_objective, delete_objective, update_objective	No	Yes	WW
hr_organization_api	hrorgapi.pkh	create_bgr_classif	No	No	WW
hr_organization_api	hrorgapi.pkh	create_business_group	Yes	No	WW
hr_organization_api	hrorgapi.pkh	create_hr_organization	No	No	WW
hr_organization_api	hrorgapi.pkh	create_legal_entity	No	No	WW
hr_organization_api	hrorgapi.pkh	create_legal_entity_classif	No	No	WW
hr_organization_api	hrorgapi.pkh	create_oper_unit_classif	No	No	WW
hr_organization_api	hrorgapi.pkh	create_operating_unit	No	No	WW
hr_organization_api	hrorgapi.pkh	create_org_classification	Yes	Yes	WW
hr_organization_api	hrorgapi.pkh	create_org_information	No	Yes	WW
hr_organization_api	hrorgapi.pkh	create_org_manager	No	No	WW
hr_organization_api	hrorgapi.pkh	create_organization	Yes	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_organization_api	hrorgapi.pkh	delete_org_manager	No	Yes	WW
hr_organization_api	hrorgapi.pkh	delete_organization	No	Yes	WW
hr_organization_api	hrorgapi.pkh	disable_org_classification	No	No	WW
hr_organization_api	hrorgapi.pkh	enable_org_classification	No	No	WW
hr_organization_api	hrorgapi.pkh	trans_org_name	No	No	WW
hr_organization_api	hrorgapi.pkh	update_org_information	No	Yes	WW
hr_organization_api	hrorgapi.pkh	update_org_manager	No	No	WW
hr_organization_api	hrorgapi.pkh	update_organization	Yes	Yes	WW
hr_participants_api	peparapi.pkh	create_participant	No	Yes	WW
hr_participants_api	peparapi.pkh	update_participant	No	Yes	WW
hr_participants_api	peparapi.pkh	delete_participant	No	Yes	WW
hr_pay_scale_api	peppsapi.pkh	create_pay_scale delete_pay_scale update_pay_scale	No	Yes	WW
hr_pay_scale_value_api **	pypsrap.pkh	create_pay_scale_value	Yes	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_pay_scale_value_api **	pypsrapi.pkh	update_pay_scale_value	Yes	No	WW
hr_pay_scale_value_api **	pypsrapi.pkh	delete_pay_scale_value	No	No	WW
hr_perf_review_api	peprvapi.pkh	create_perf_review	No	Yes	WW
hr_perf_review_api	peprvapi.pkh	delete_perf_review	No	Yes	WW
hr_perf_review_api	peprvapi.pkh	update_perf_review	No	Yes	WW
hr_performance_ratings_api	peprtapi.pkh	create_performance_rating	No	Yes	WW
hr_performance_ratings_api	peprtapi.pkh	delete_performance_rating	No	Yes	WW
hr_performance_ratings_api	peprtapi.pkh	update_performance_rating	No	Yes	WW
hr_periods_of_placement_api	pepdapi.pkh	update_pdp_details	No	Yes	WW
hr_periods_of_service_api	pepdsapi.pkh	update_pds_details	Yes	Yes	WW
hr_person_absence_api	peabsapi.pkh	create_person_absence	No	Yes	WW
hr_person_absence_api	peabsapi.pkh	delete_absence_element	No	No	WW
hr_person_absence_api	peabsapi.pkh	insert_absence_element	No	No	WW
hr_person_absence_api	peabsapi.pkh	update_absence_element	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_person_absence_api	peabsapi.pkh	delete_person_absence	No	Yes	WW
hr_person_absence_api	peabsapi.pkh	update_person_absence	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_person_address_api	peaddapi.pkh	create_gb_person_address	Yes	No	UK
hr_person_address_api	peaddapi.pkh	create_hk_person_address	Yes	No	WW
hr_person_address_api	peaddapi.pkh	create_person_address	Yes	Yes	WW
hr_person_address_api	peaddapi.pkh	create_us_person_address	Yes	No	US

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_person_address_api	peaddapi.pkh	update_at_person_address, update_au_person_address, update_be_person_address, update_de_person_address, update_dk_person_address, update_es_person_address, update_fi_person_address, update_gr_person_address, update_ie_person_address, update_it_person_address, update_lu_person_address, update_mx_person_address, update_my_person_address, update_nl_person_address, update_pt_person_address, update_sa_person_address, update_se_person_address, update_sg_person_address	No	No	WW
hr_person_address_api	peaddapi.pkh	update_gb_person_address	Yes	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_person_address_api	peaddapi.pkh	update_person_address	Yes	Yes	WW
hr_person_address_api	peaddapi.pkh	update_pers_addr_with_style	No	Yes	WW
hr_person_address_api	peaddapi.pkh	update_us_person_address	Yes	No	WW
hr_person_address_api	peaddapi.pkh	cre_or_upd_person_address	Yes	No	WW
hr_person_api	peperapi.pkh	update_gb_person	Yes	No	UK
hr_person_api	peperapi.pkh	update_person	Yes	Yes	WW
hr_person_api	peperapi.pkh	update_us_person	Yes	No	US
hr_person_extra_info_api	pepeiapi.pkh	create_person_extra_info, delete_person_extra_info, update_person_extra_info	No	Yes	WW
hr_person_type_usage_api	peptuapi.pkh	create_person_type_usage, delete_person_type_usage, update_person_type_usage	No	Yes	WW
hr_personal_pay_method_api	pyppmapi.pkh	create_ca_personal_pay_method, update_ca_personal_pay_method	No	No	CA
hr_personal_pay_method_api	pyppmapi.pkh	create_gb_personal_pay_method	Yes	No	UK

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_personal_pay_method_api	pyppmapi.pkh	create_personal_pay_method	Yes	Yes	WW
hr_personal_pay_method_api	pyppmapi.pkh	create_us_personal_pay_method	Yes	No	US
hr_personal_pay_method_api	pyppmapi.pkh	delete_personal_pay_method	Yes	Yes	WW
hr_personal_pay_method_api	pyppmapi.pkh	update_gb_personal_pay_method	Yes	No	UK
hr_personal_pay_method_api	pyppmapi.pkh	update_personal_pay_method	Yes	Yes	WW
hr_personal_pay_method_api	pyppmapi.pkh	update_us_personal_pay_method	Yes	No	US
hr_phone_api	pephnapi.pkh	create_phone	Yes	Yes	WW
hr_phone_api	pephnapi.pkh	create_or_update_phone	No	No	WW
hr_phone_api	pephnapi.pkh	update_phone	No	Yes	WW
hr_phone_api	pephnapi.pkh	delete_phone	Yes	Yes	WW
hr_pos_hierarchy_ele_api	pepseapi.pkh	create_pos_hierarchy_ele	No	Yes	WW
hr_pos_hierarchy_ele_api	pepseapi.pkh	delete_pos_hierarchy_ele	No	Yes	WW
hr_pos_hierarchy_ele_api	pepseapi.pkh	update_pos_hierarchy_ele	No	Yes	WW
hr_position_api	peposapi.pkh	create_position	Yes	Yes	WW
hr_position_api	peposapi.pkh	delete_position	Yes	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_position_api	peposapi.pkh	update_position	Yes	Yes	WW
hr_position_extra_info_api	pepoiapi.pkh	create_position_extra_info, delete_position_extra_info, update_position_extra_info	No	Yes	WW
hr_position_requirement_api	pepsrapi.pkh	create_position_requirement	Yes	Yes	WW
hr_previous_employment_api	pepemapi.pkh	create_previous_employer, update_previous_employer, delete_previous_employer, create_previous_job, update_previous_job, delete_previous_job, create_prev_job_extra_info, update_prev_job_extra_info, delete_prev_job_extra_info, create_previous_job_usage, update_previous_job_usage, delete_previous_job_usage	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_progression_point_api	pepspapi.pkh	create_progression_point delete_progression_point update_progression_point	No	Yes	WW
hr_qualification_type_api	peeqtapi.pkh	create_qualification_type, update_qualification_type	Yes	Yes	WW
hr_qualification_type_api	peeqtapi.pkh	delete_qualification_type	No	Yes	WW
hr_rate_api	pypyrapi.pkh	create_assignment_rate	No	Yes	WW
hr_rate_api	pypyrapi.pkh	create_rate	No	Yes	WW
hr_rate_api	pypyrapi.pkh	delete_rate	No	Yes	WW
hr_rate_api	pypyrapi.pkh	update_assignment_rate	No	Yes	WW
hr_rate_api	pypyrapi.pkh	update_rate	No	Yes	WW
hr_rate_values_api	pypgrapi.pkh	create_assignment_rate_value	Yes	Yes	WW
hr_rate_values_api	pypgrapi.pkh	create_rate_value, delete_rate_value, update_rate_value	No	Yes	WW
hr_rate_values_api	pypgrapi.pkh	update_assignment_rate_value	Yes	Yes	WW
hr_rate_values_api	pypgrapi.pkh	update_rate_value	Yes	Yes	WW
hr_rating_levels_api	pertlapi.pkh	create_rating_level	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_rating_levels_api	pertlapi.pkh	delete_rating_level	No	Yes	WW
hr_rating_levels_api	pertlapi.pkh	update_rating_level	Yes	Yes	WW
hr_rating_scales_api	perscapi.pkh	create_rating_scale	Yes	Yes	WW
hr_rating_scales_api	perscapi.pkh	delete_rating_scale	No	Yes	WW
hr_rating_scales_api	perscapi.pkh	update_rating_scale	Yes	Yes	WW
hr_retained_rights_api	peretapi.pkh	create_retained_right, delete_retained_right, update_retained_right	No	No	WW
hr_sa_applicant_api	peappsai.pkh	create_sa_applicant	No	No	SA
hr_sa_assignment_api	peasgsai.pkh	create_sa_secondary_emp_asg update_sa_emp_asg	No	No	SA
hr_sa_contact_api	peconsai.pkh	create_sa_person	No	No	SA
hr_sa_contingent_worker_api	pecwksai.pkh	create_sa_cwk	No	No	SA
hr_sa_contract_api	pectcsai.pkh	create_sa_contract update_sa_contract	No	No	SA
hr_sa_employee_api	peempsai.pkh	create_sa_employee	No	No	SA
hr_sa_periods_of_service_api	pepdssai.pkh	update_sa_pds_details	No	No	SA
hr_sa_person_api	pepersai.pkh	update_sa_person	No	No	SA

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_sa_previous_employment_api	pepemsai.pkh	create_sa_previous_employer update_sa_previous_employer	No	No	SA
hr_salary_basis_api	peppbapi.pkh	create_salary_basis	No	Yes	WW
hr_salary_basis_api	peppbapi.pkh	delete_salary_basis	No	Yes	WW
hr_salary_basis_api	peppbapi.pkh	update_salary_basis	No	Yes	WW
hr_salary_survey_api	pepsapi.pkh	create_salary_survey	No	Yes	WW
hr_salary_survey_api	pepsapi.pkh	delete_salary_survey	No	Yes	WW
hr_salary_survey_api	pepsapi.pkh	update_salary_survey	No	Yes	WW
hr_salary_survey_line_api	pesslapi.pkh	create_salary_survey_line	No	No	WW
hr_salary_survey_line_api	pesslapi.pkh	delete_salary_survey_line	No	No	WW
hr_salary_survey_line_api	pesslapi.pkh	update_salary_survey_line	No	Yes	WW
hr_salary_survey_mapping_api	pepsmapi.pkh	create_mapping, delete_mapping, mass_update, update_mapping	No	Yes	WW
hr_security_organization_api	pepsoapi.pkh	create_security_organization	No	Yes	WW
hr_security_organization_api	pepsoapi.pkh	delete_security_organization	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_security_organization_api	pepsoapi.pkh	update_security_organization	No	Yes	WW
hr_security_payrolls_api	hrsprapi.pkh	create_pay_security_payroll	No	Yes	WW
hr_security_payrolls_api	hrsprapi.pkh	delete_pay_security_payroll	No	Yes	WW
hr_security_user_api	hrseuapi.pkh	create_security_user, delete_security_user, update_security_user	No	Yes	WW
hr_sg_applicant_api	hrsgwraa.pkh	create_sg_applicant	Yes	No	SG
hr_sg_assignment_api	hrsgwras.pkh	create_sg_secondary_emp_asg, update_sg_emp_asg	Yes	No	SG
hr_sg_employee_api	hrsgwree.pkh	create_sg_employee	Yes	No	SG
hr_sg_person_api	hrsgwrpe.pkh	update_sg_person	Yes	No	SG
hr_sg_personal_pay_method_api	hrsgwrpm.pkh	create_sg_personal_pay_method, update_sg_personal_pay_method	Yes	No	SG
hr_sit_api	pesitapi.pkh	create_sit	Yes	Yes	WW
hr_sit_api	pesitapi.pkh	delete_sit	No	Yes	WW
hr_sit_api	pesitapi.pkh	update_sit	No	Yes	WW
hr_sp_placement_api	pesppapi.pkh	create_spp	No	Yes	WW
hr_sp_placement_api	pesppapi.pkh	delete_spp	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_sp_placement_api	pesppapi.pkh	update_spp	No	Yes	WW
hr_std_hol_abs_api	peshaapi.pkh	create_std_hol_abs, delete_std_hol_abs, update_std_hol_abs	No	Yes	WW
hr_tcp_api	hrtcpapi.pkh	create_tcp, delete_tcp	No	Yes	WW
hr_upload_proposal_api	hrpyapi.pkh	upload_salary_proposal	Yes	Yes	WW
hr_user_acct_api	hrusrapi.pkh	create_user_acct, update_user_acct	Yes	Yes	WW
hr_valid_grade_api	pevgrapi.pkh	create_valid_grade	Yes	Yes	WW
hxt_gen_aai	hxtgenai.pkh	create_otlr_add_assign_info	No	No	WW
hxt_gen_aai	hxtgenai.pkh	update_otlr_add_assign_info	No	No	WW
pay_action_information_api	pyaifapi.pkh	create_action_information, delete_action_information, update_action_information	No	Yes	WW
pay_balance_adjustment_api	pybadapi.pkh	create_adjustment	No	No	WW
pay_balance_adjustment_api	pybadapi.pkh	delete_adjustment	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_balance_attribute_api	pypbaapi.pkh	create_balance_attribute, delete_balance_attribute	No	Yes	WW
pay_balance_category_api	pypbcapi.pkh	create_balance_category, delete_balance_category, update_balance_category	No	Yes	WW
pay_bal_attribute_default_api	pypbdapi.pkh	create_bal_attribute_default, delete_bal_attribute_default	No	Yes	WW
pay_bal_attr_definition_api	pyatdapi.pkh	create_bal_attr_definition, delete_bal_attr_definition	No	Yes	WW
pay_batch_element_entry_api	pybthapi.pkh	create_batch_header, create_batch_line, create_batch_total, update_batch_header, update_batch_line, update_batch_total, delete_batch_header, delete_batch_line, delete_batch_total	No	Yes	WW
pay_ca_emp_fedtax_inf_api	pycatapi.pkh	create_ca_emp_fedtax_inf update_ca_emp_fedtax_inf delete_ca_emp_fedtax_inf	No	Yes	CA

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_ca_emp_prvtax_inf_api	pycprapi.pkh	create_ca_emp_prvtax_inf update_ca_emp_prvtax_inf delete_ca_emp_prvtax_inf	No	Yes	CA
pay_city_tax_rule_api	pyctyapi.pkh	create_city_tax_rule update_city_tax_rule	Yes	Yes	US
pay_cnu_apl	pycnuapi.pkh	create_contribution_usage	No	Yes	FR
pay_cnu_api	pycnuapi.pkh	delete_contribution_usage	No	Yes	FR
pay_cnu_api	pycnuapi.pkh	update_contribution_usage	No	Yes	FR
pay_contribution_history_api	pyconapi.pkh	create_contribution_history delete_contribution_history update_contribution_history	No	Yes	WW
pay_cost_allocation_api	pycalapi.pkh	create_cost_allocation	No	Yes	WW
pay_cost_allocation_api	pycalapi.pkh	delete_cost_allocation	No	Yes	WW
pay_cost_allocation_api	pycalapi.pkh	update_cost_allocation	No	Yes	WW
pay_county_tax_rule_api	pycntapi.pkh	create_county_tax_rule update_county_tax_rule	Yes	Yes	US

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_datetracked_events_api	pydteapi.pkh	create_datetracked_event, delete_datetracked_event, update_datetracked_event	No	Yes	WW
pay_element_entry_api	pyeleapi.pkh	create_element_entry	Yes	No	WW
pay_element_entry_api	pyeleapi.pkh	delete_element_entry	Yes	No	WW
pay_element_entry_api	pyeleapi.pkh	update_element_entry	Yes	No	WW
pay_element_extra_info_api	pyeeiapi.pkh	create_element_extra_info, delete_element_extra_info, update_element_extra_info	No	Yes	WW
pay_element_link_api	pypelapi.pkh	create_element_link, delete_element_link, update_element_link	Yes	Yes	WW
pay_element_types_api	pyetpapi.pkh	create_element_types, delete_element_types, update_element_types	Yes	Yes	WW
pay_element_type_usage_api	pyetuapi.pkh	create_element_type_usage	No	Yes	WW
pay_element_type_usage_api	pyetuapi.pkh	delete_element_type_usage	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_element_type_usage_api	pyetuapi.pkh	update_element_type_usage	No	Yes	WW
pay_event_groups_api	pyevgapi.pkh	create_event_group, delete_event_group, update_event_group	No	Yes	WW
pay_event_procedures_api	pyevpapi.pkh	create_event_proc, delete_event_proc, update_event_proc	No	Yes	WW
pay_event_qualifiers_api	pyevqapi.pkh	create_event_qualifier, delete_event_qualifier, update_event_qualifier	No	Yes	WW
pay_event_updates_api	pypeuapi.pkh	create_event_update, delete_event_update, update_event_update	No	Yes	WW
pay_federal_tax_rule_api	pyfedapi.pkh	update_fed_tax_rule	Yes	Yes	US
pay_ie_paye_api	pyipdapi.pkh	create_ie_paye_details, delete_ie_paye_details, update_ie_paye_details	No	Yes	IE
pay_ie_prsi_api	pysidapi.pkh	create_ie_prsi_details, delete_ie_prsi_details, update_ie_prsi_details	No	Yes	IE
pay_ie_sb_api	pyiebapi.pkh	create_ie_sb_details, delete_ie_sb_details, update_ie_sb_details	No	Yes	IE

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_in_org_payment_method_api	pyopmini.pkh	create_in_org_payment_method, update_in_org_payment_method	Yes	No	IN
pay_input_value_api	pyivlapi.pkh	create_input_value, delete_input_value, update_input_value	Yes	No	WW
pay_iterative_rules_api	pyitrapi.pkh	create_iterative_rule, delete_iterative_rule, update_iterative_rule,	No	No	WW
pay_link_input_values	pylivapi.pkh	delete_link_input_values, update_link_input_values	Yes	Yes	WW
pay_ncr_api	pyncrapi.pkh	create_pay_net_calc_rule, delete_pay_net_calc_rule, update_pay_net_calc_rule	No	Yes	WW
pay_org_payment_method_api	pyopmapi.pkh	create_org_payment_method, update_org_payment_method, delete_org_payment_method	No	Yes	WW
pay_payroll_api	pyprlapi.pkh	create_payroll, delete_payroll, update_payroll	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_pmed_accounts_api	pypmaapi.pkh	create_pmed_accounts update_pmed_accounts delete_pmed_accounts	No	Yes	CA
pay_run_type_api	pyprtapi.pkh	create_run_type	No	Yes	WW
pay_run_type_api	pyprtapi.pkh	delete_run_type	No	Yes	WW
pay_run_type_api	pyprtapi.pkh	update_run_type	No	Yes	WW
pay_run_type_org_method_api	pyromapi.pkh	create_run_type_org_method	No	Yes	WW
pay_run_type_org_method_api	pyromapi.pkh	delete_run_type_org_method	No	Yes	WW
pay_run_type_org_method_api	pyromapi.pkh	update_run_type_org_method	No	Yes	WW
pay_run_type_usage_api	pyrtuapi.pkh	create_run_type_usage	No	Yes	WW
pay_run_type_usage_api	pyrtuapi.pkh	delete_run_type_usage	No	Yes	WW
pay_run_type_usage_api	pyrtuapi.pkh	update_run_type_usage	No	Yes	WW
pay_state_tax_rule_api	pystaapi.pkh	create_state_tax_rule update_state_tax_rule	Yes	Yes	US
pay_status_processing_rule_api	pypprapi.pkh	create_status_process_rule, delete_status_process_rule, update_status_process_rule	Yes	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_us_tax_api	pytaxapi.pkh	delete_tax_rule	No	No	US
pay_us_tax_bals_adj_api	pytbaapi.pkh	create_tax_balance_adjustment	No	No	US
pay_user_column_api	pypucapi.pkh	create_user_column delete_user_column update_user_column	Yes	Yes	WW
pay_user_column_instance_api	pyuciapi.pkh	create_user_column_instance delete_user_column_instance update_user_column_instance	Yes	Yes	WW
pay_user_row_api	pypurapi.pkh	create_user_row delete_user_row update_user_row	Yes	Yes	WW
pay_user_table_api	pyputapi.pkh	create_user_table delete_user_table update_user_table	Yes	Yes	WW
pay_wci_accounts_api	pypwaapi.pkh	create_wci_accounts, update_wci_accounts, delete_wci_accounts	No	Yes	CA
pay_wci_occupations_api	pypwoapi.pkh	create_wci_occupation update_wci_occupation delete_wci_occupation	No	Yes	CA

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pay_wci_rates_api	pypwraapi.pkh	create_wci_rate, update_wci_rate, delete_wci_rate	No	Yes	CA
per_bf_balance_amounts_api	pebbaapi.pkh	create_balance_amount, delete_balance_amount, update_balance_amount	No	Yes	WW
per_bf_balance_types_api	pebbtapi.pkh	create_balance_type, delete_balance_type, update_balance_type	No	Yes	WW
per_bf_payment_details_api	pebpdapi.pkh	create_payment_detail, delete_payment_detail, update_payment_detail	No	Yes	WW
per_bf_payroll_runs_api	pebprapi.pkh	create_payroll_run	Yes	Yes	WW
per_bf_payroll_runs_api	pebprapi.pkh	delete_payroll_run, update_payroll_run	No	Yes	WW
per_bf_proc_assignment_api	pebpaapi.pkh	create_processed_assignment	No	Yes	WW
per_bf_proc_assignment_api	pebpaapi.pkh	delete_processed_assignment	No	Yes	WW
per_bf_proc_assignment_api	pebpaapi.pkh	update_processed_assignment	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
per_ca_person_address_api	peaddcai.pkh	create_ca_person_address, update_ca_person_address	No	No	CA
per_cancel_application_api	pecapapi.pkh	cancel_application	No	Yes	WW
per_checklist_items_api	pechkapi.pkh	create_checklist_items, update_checklist_items, delete_checklist_items	No	Yes	WW
per_disability_api	pedisapi.pkh	create_disability, update_disability, delete_disability	No	Yes	WW
per_estab_attendances_api	peesapi.pkh	create_attended_estab	No	Yes	WW
per_estab_attendances_api	peesapi.pkh	delete_attended_estab	No	Yes	WW
per_estab_attendances_api	peesapi.pkh	update_attended_estab	No	Yes	WW
per_events_api	peevtapi.pkh	create_event	No	Yes	WW
per_events_api	peevtapi.pkh	delete_event	No	Yes	WW
per_events_api	peevtapi.pkh	update_event	No	Yes	WW
per_hierarchy_api	pepghapi.pkh	create_hierarchy, update_hierarchy, delete_hierarchy	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
per_hierarchy_nodes_api	pepgnapi.pkh	create_hierarchy_nodes, update_hierarchy_nodes, delete_hierarchy_nodes	No	Yes	WW
per_hierarchy_versions_api	pepgvapi.pkh	create_hierarchy_versions, update_hierarchy_versions, delete_hierarchy_versions	No	Yes	WW
per_job_extra_info_api	pejeiapi.pkh	create_job_extra_info, delete_job_extra_info, update_job_extra_info	No	Yes	WW
per_job_group_api	pejgrapi.pkh	create_job_group	Yes	Yes	WW
per_job_group_api	pejgrapi.pkh	delete_job_group	No	Yes	WW
per_job_group_api	pejgrapi.pkh	update_job_group	Yes	Yes	WW
per_medical_assessment_api	pemeaapi.pkh	create_medical_assessment, update_medical_assessment, delete_medical_assessment	No	Yes	WW
per_org_structure_version_api	peosvapi.pkh	create_org_structure_version, update_org_structure_version,	Yes	Yes	WW
per_org_structure_version_api	peosvapi.pkh	delete_org_structure_version	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
per_organization_structure_api	peorsapi.pkh	create_org_struct_and_def_ver	No	No	WW
per_organization_structure_api	peorsapi.pkh	create_organization_structure, update_organization_structure,	Yes	Yes	WW
per_organization_structure_api	peorsapi.pkh	delete_organization_structure	No	Yes	WW
per_pos_structure_version_api	pepsvapi.pkh	create_pos_structure_version, update_pos_structure_version, delete_pos_structure_version	No	Yes	WW
per_position_structure_api	pepstapi.pkh	create_pos_struct_and_def_ver	No	No	WW
per_position_structure_api	pepstapi.pkh	create_position_structure, update_position_structure, delete_positiontion_structure	No	Yes	WW
per_qualifications_api	pequaapi.pkh	create_qualification, update_qualification, delete_qualification	No	Yes	WW
per_rec_activity_for_api	percfapi.pkh	create_rec_activity_for	No	Yes	WW
per_rec_activity_for_api	percfapi.pkh	delete_rec_activity_for	No	Yes	WW
per_rec_activity_for_api	percfapi.pkh	update_rec_activity_for	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
per_recruitment_activity_api	peraaapi.pkh	create_recruitment_activity	No	Yes	WW
per_recruitment_activity_api	peraaapi.pkh	delete_recruitment_activity	No	Yes	WW
per_recruitment_activity_api	peraaapi.pkh	update_recruitment_activity	No	Yes	WW
per_requisitions_api	pereqapi.pkh	create_requisition	No	Yes	WW
per_requisitions_api	pereqapi.pkh	delete_requisition	No	Yes	WW
per_requisitions_api	pereqapi.pkh	update_requisition	No	Yes	WW
per_sa_disability_api	pedissai.pkh	create_sa_disability update_sa_disability	No	No	SA
per_sa_work_incident_api	peincsai.pkh	create_sa_work_incident update_sa_work_incident	No	No	SA
per_shared_types_api	peshtapi.pkh	create_shared_type	No	Yes	WW
per_shared_types_api	peshtapi.pkh	delete_shared_type	No	Yes	WW
per_shared_types_api	peshtapi.pkh	update_shared_type	No	Yes	WW
per_supplementary_role_api	perolapi.pkh	create_supplementary_role	Yes	Yes	WW
per_supplementary_role_api	perolapi.pkh	delete_supplementary_role	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
per_supplementary_role_api	perolapi.pkh	update_supplementary_role	Yes	Yes	WW
per_vacancy_api	pevacapi.pkh	create_vacancy	No	Yes	WW
per_vacancy_api	pevacapi.pkh	delete_vacancy	No	Yes	WW
per_vacancy_api	pevacapi.pkh	update_vacancy	No	Yes	WW
per_work_incident_api	peincapi.pkh	create_work_incident, update_work_incident, delete_work_incident	No	Yes	WW
pqh_accommodations_api	pqaccapi.pkh	create_accommodation	No	Yes	FR
pqh_accommodations_api	pqaccapi.pkh	delete_accommodation	No	Yes	FR
pqh_accommodations_api	pqaccapi.pkh	update_accommodation	No	Yes	FR
pqh_assign_accommodations_api	pqasaapi.pkh	create_assign_accommodation	No	Yes	FR
pqh_assign_accommodations_api	pqasaapi.pkh	delete_assign_accommodation	No	Yes	FR
pqh_assign_accommodations_api	pqasaapi.pkh	update_assign_accommodation	No	Yes	FR
pqh_attribute_ranges_api	pqrngapi.pkh	create_attribute_range, update_attribute_range, delete_attribute_range	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_bdgt_cmmtmnt_elmnts_api	pqbceapi.pkh	create_bdgt_cmmtmnt_elmnt, update_bdgt_cmmtmnt_elmnt, delete_bdgt_cmmtmnt_elmnt	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	create_realloc_txn_dtl	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	create_realloc_txn_period	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	delete_realloc_txn_dtl	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	delete_realloc_txn_period	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	update_realloc_txn_dtl	No	Yes	WW
pqh_bdgt_pool_reallocations_api	pqbreapi.pkh	update_realloc_txn_period	No	Yes	WW
pqh_budget_details_api	pqbdtapi.pkh	create_budget_detail, update_budget_detail, delete_budget_detail	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_budget_elements_api	pqbelapi.pkh	create_budget_element, update_budget_element, delete_budget_element	No	Yes	WW
pqh_budget_fund_srcs_api	pqbfsapi.pkh	create_budget_fund_src, update_budget_fund_src, delete_budget_fund_src	No	Yes	WW
pqh_budget_gl_flex_maps_api	pqbgmapi.pkh	create_budget_gl_flex_map, update_budget_gl_flex_map, delete_budget_gl_flex_map	No	Yes	WW
pqh_budget_periods_api	pqbprapi.pkh	create_budget_period, update_budget_period, delete_budget_period	No	Yes	WW
pqh_budget_pools_api	pqbplapi.pkh	create_reallocation_folder	No	Yes	WW
pqh_budget_pools_api	pqbplapi.pkh	create_reallocation_txn	No	Yes	WW
pqh_budget_pools_api	pqbplapi.pkh	delete_reallocation_folder	No	Yes	WW
pqh_budget_pools_api	pqbplapi.pkh	delete_reallocation_txn	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_budget_pools_api	pqbplapi.pkh	update_reallocation_folder	No	Yes	WW
pqh_budget_pools_api	pqbplapi.pkh	update_reallocation_txn	No	Yes	WW
pqh_budget_sets_api	pqbstapi.pkh	create_budget_set, update_budget_set, delete_budget_set	No	Yes	WW
pqh_budget_versions_api	pqbvrapi.pkh	create_budget_version, update_budget_version, delete_budget_version	No	Yes	WW
pqh_budgets_api	pqbgapi.pkh	create_budget, update_budget, delete_budget	No	Yes	WW
pqh_corps_definition_api	pqcpdapi.pkh	create_corps_definition	No	Yes	FR
pqh_corps_definition_api	pqcpdapi.pkh	delete_corps_definition	No	Yes	FR
pqh_corps_definition_api	pqcpdapi.pkh	update_corps_definition	No	Yes	FR
pqh_corps_extra_info_api	pqceiapi.pkh	create_corps_extra_info	No	Yes	FR
pqh_corps_extra_info_api	pqceiapi.pkh	delete_corps_extra_info	No	Yes	FR
pqh_corps_extra_info_api	pqceiapi.pkh	update_corps_extra_info	No	Yes	FR

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_de_case_groups_api	pqcgnapi.pkh	delete_case_groups	No	Yes	DE
pqh_de_case_groups_api	pqcgnapi.pkh	insert_case_groups	No	No	DE
pqh_de_case_groups_api	pqcgnapi.pkh	update_case_groups	No	Yes	DE
pqh_de_ent_minutes_api	pqetmapi.pkh	delete_ent_minutes	No	Yes	DE
pqh_de_ent_minutes_api	pqetmapi.pkh	insert_ent_minutes	No	No	DE
pqh_de_ent_minutes_api	pqetmapi.pkh	update_ent_minutes	No	Yes	DE
pqh_de_ins_end_reasons_api	pqpreapi.pkh	delete_pension_end_reasons	No	Yes	DE
pqh_de_ins_end_reasons_api	pqpreapi.pkh	insert_pension_end_reasons	No	No	DE
pqh_de_ins_end_reasons_api	pqpreapi.pkh	update_pension_end_reasons	No	Yes	DE
pqh_de_level_codes_api	pqlcdapi.pkh	delete_level_codes	No	Yes	DE
pqh_de_level_codes_api	pqlcdapi.pkh	insert_level_codes	No	No	DE
pqh_de_level_codes_api	pqlcdapi.pkh	update_level_codes	No	Yes	DE
pqh_de_level_numbers_api	pqgvnapi.pkh	delete_level_numbers	No	Yes	DE
pqh_de_level_numbers_api	pqgvnapi.pkh	insert_level_numbers	No	No	DE
pqh_de_level_numbers_api	pqgvnapi.pkh	update_level_numbers	No	Yes	DE

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_de_operation_groups_api	pqopgapi.pkh	delete_operation_groups	No	Yes	DE
pqh_de_operation_groups_api	pqopgapi.pkh	insert_operation_groups	No	No	DE
pqh_de_operation_groups_api	pqopgapi.pkh	update_operation_groups	No	Yes	DE
pqh_de_operations_api	pqoplapi.pkh	delete_operations	No	Yes	DE
pqh_de_operations_api	pqoplapi.pkh	insert_operations	No	No	DE
pqh_de_operations_api	pqoplapi.pkh	update_operations	No	Yes	DE
pqh_de_result_sets_api	pqrssapi.pkh	delete_result_sets	No	Yes	DE
pqh_de_result_sets_api	pqrssapi.pkh	insert_result_sets	No	No	DE
pqh_de_result_sets_api	pqrssapi.pkh	update_result_sets	No	Yes	DE
pqh_de_tktdtls_api	pqtktape.pkh	delete_tkt_dtls	No	No	DE
pqh_de_tktdtls_api	pqtktape.pkh	insert_tkt_dtls	No	No	DE
pqh_de_tktdtls_api	pqtktape.pkh	update_tkt_dtls	No	No	DE
pqh_de_vlddef_api	pqdefapi.pkh	delete_vldtn_defn	No	No	DE
pqh_de_vlddef_api	pqdefapi.pkh	insert_vldtn_defn	No	Yes	DE
pqh_de_vlddef_api	pqdefapi.pkh	update_vldtn_defn	No	Yes	DE

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_de_vldjob_api	pqwvjapi.pkh	delete_vldtn_job	No	Yes	DE
pqh_de_vldjob_api	pqwvjapi.pkh	insert_vldtn_job	No	Yes	DE
pqh_de_vldjob_api	pqwvjapi.pkh	update_vldtn_job	No	Yes	DE
pqh_de_vldjobftr_api	pqftrapi.pkh	delete_vldtn_jobftr	No	Yes	DE
pqh_de_vldjobftr_api	pqftrapi.pkh	insert_vldtn_jobftr	No	Yes	DE
pqh_de_vldjobftr_api	pqftrapi.pkh	update_vldtn_jobftr	No	Yes	DE
pqh_de_vldlvl_api	pqlvlapi.pkh	delete_vldtn_lvl	No	Yes	DE
pqh_de_vldlvl_api	pqlvlapi.pkh	insert_vldtn_lvl	No	Yes	DE
pqh_de_vldlvl_api	pqlvlapi.pkh	update_vldtn_lvl	No	Yes	DE
pqh_de_vldopr_api	pqopsapi.pkh	delete_vldtn_oprn	No	Yes	DE
pqh_de_vldopr_api	pqopsapi.pkh	insert_vldtn_oprn	No	Yes	DE
pqh_de_vldopr_api	pqopsapi.pkh	update_vldtn_oprn	No	Yes	DE
pqh_de_vldver_api	pqverapi.pkh	delete_vldtn_vern	No	Yes	DE
pqh_de_vldver_api	pqverapi.pkh	insert_vldtn_vern	No	Yes	DE
pqh_de_vldver_api	pqverapi.pkh	update_vldtn_vern	No	Yes	DE
pqh_dflt_budget_elements_api	pqdelapi.pkh	create_dflt_budget_element, update_dflt_budget_element, delete_dflt_budget_element	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_dflt_budget_sets_api	pqdstapi.pkh	create_dflt_budget_set, update_dflt_budget_set, delete_dflt_budget_set	No	Yes	WW
pqh_dflt_fund_srcs_api	pqdfsapi.pkh	create_dflt_fund_src, update_dflt_fund_src, delete_dflt_fund_src	No	Yes	WW
pqh_fr_global_payscale_api	pqginapi.pkh	create_global_index, delete_global_index, update_global_index	No	Yes	FR
pqh_fr_global_payscale_api	pqginapi.pkh	create_indemnity_rate, delete_indemnity_rate, update_indemnity_rate	No	Yes	FR
pqh_fr_stat_situations_api	pqstsapi.pkh	create_statutory_situation, delete_statutory_situation, update_statutory_situation	No	Yes	FR
pqh_fr_stat_sit_rules_api	pqstrapi.pkh	create_stat_situation_rule, delete_stat_situation_rule, update_stat_situation_rule	No	Yes	FR
pqh_fr_validations_api	pqvldapi.pkh	delete_validation	No	Yes	FR
pqh_fr_validations_api	pqvldapi.pkh	insert_validation	No	Yes	FR

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_fr_validations_api	pqvldapi.pkh	update_validation	No	Yes	FR
pqh_fr_validation_events_api	pqvleapi.pkh	delete_validation_event	No	Yes	FR
pqh_fr_validation_events_api	pqvleapi.pkh	insert_validation_event	No	Yes	FR
pqh_fr_validation_events_api	pqvleapi.pkh	update_validation_event	No	Yes	FR
pqh_fr_validation_periods_api	pqvlpapi.pkh	delete_validation_period	No	Yes	FR
pqh_fr_validation_periods_api	pqvlpapi.pkh	insert_validation_period	No	Yes	FR
pqh_fr_validation_periods_api	pqvlpapi.pkh	update_validation_period	No	Yes	FR
pqh_ref_templates_api	pqrftapi.pkh	create_ref_template, update_ref_template delete_ref_template	No	Yes	WW
pqh_role_extra_info_api	pqreiapi.pkh	create_role_extra_info	No	Yes	WW
pqh_role_extra_info_api	pqreiapi.pkh	delete_role_extra_info	No	Yes	WW
pqh_role_extra_info_api	pqreiapi.pkh	update_role_extra_info	No	Yes	WW
pqh_role_templates_api	pqrmapapi.pkh	create_role_template, update_role_template, delete_role_template	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_roles_api	pqrلسapi.pkh	create_role, update_role, delete_role	No	Yes	WW
pqh_routing_categories_api	pqrctapi.pkh	create_routing_category, update_routing_category, delete_routing_category	No	Yes	WW
pqh_routing_list_members_api	pqrلmapi.pkh	create_routing_list_member, update_routing_list_member, delete_routing_list_member	No	Yes	WW
pqh_routing_lists_api	pqrلtapi.pkh	create_routing_list, update_routing_list, delete_routing_list	No	Yes	WW
pqh_rule_attributes_api	pqrلاapi.pkh	delete_rule_attribute	No	Yes	WW
pqh_rule_attributes_api	pqrلاapi.pkh	insert_rule_attribute	No	Yes	WW
pqh_rule_attributes_api	pqrلاapi.pkh	update_rule_attribute	No	Yes	WW
pqh_rule_sets_api	pqrstapi.pkh	create_rule_set, update_rule_set, delete_rule_set	No	Yes	WW
pqh_situations_api	pqlosapi.pkh	create_situation	No	Yes	FR
pqh_situations_api	pqlosapi.pkh	delete_situation	No	Yes	FR
pqh_situations_api	pqlosapi.pkh	update_situation	No	Yes	FR

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqh_ template_ attributes_api	pqtatapi.pkh	create_ template_ attribute, update_ template_ attribute, delete_ template_ attribute	No	Yes	WW
pqh_ templates_api	pqtemapi.pkh	create_ generic_ template, update_ generic_ template, delete_ generic_ template	No	Yes	WW
pqh_tran_ category_api	pqtctapi.pkh	update_tran_ category	No	Yes	WW
pqh_txn_cat_ attributes_api	pqtcaapi.pkh	update_txn_ cat_attribute	No	Yes	WW
pqh_txn_job_ requirements_ api	pqtjrapi.pkh	create_ txn_job_ requirement	No	Yes	WW
pqh_txn_job_ requirements_ api	pqtjrapi.pkh	delete_ txn_job_ requirement	No	Yes	WW
pqh_txn_job_ requirements_ api	pqtjrapi.pkh	update_ txn_job_ requirement	No	Yes	WW
pqp_aat_api	pqaatapi.pkh	create_ assignment_ attribute, delete_ assignment_ attribute, update_ assignment_ attribute	No	Yes	WW
pqp_ pension_ types_api	pqptyapi.pkh	create_ pension_type	No	Yes	WW
pqp_ pension_ types_api	pqptyapi.pkh	delete_ pension_type	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
pqp_pension_types_api	pqptyapi.pkh	update_pension_type	No	Yes	WW
pqp_shp_api	pqshpapi.pkh	create_service_history_period, delete_service_history_period, update_service_history_period	No	Yes	WW
pqp_vehicle_allocations_api	pqvalapi.pkh	create_vehicle_allocation	No	Yes	WW
pqp_vehicle_allocations_api	pqvalapi.pkh	delete_vehicle_allocation	No	Yes	WW
pqp_vehicle_allocations_api	pqvalapi.pkh	update_vehicle_allocation	No	Yes	WW
pqp_vehicle_details_api	pqpvdapi.pkh	create_vehicle_details, delete_vehicle_details, update_vehicle_details	Yes	No	WW
pqp_vehicle_repository_api	pqvreapi.pkh	create_vehicle	Yes	Yes	WW
pqp_vehicle_repository_api	pqvreapi.pkh	delete_vehicle	Yes	Yes	WW
pqp_vehicle_repository_api	pqvreapi.pkh	update_vehicle	Yes	Yes	WW

* CREATE_COMPETENCE_ELEMENT is supported by Data Pump only when the type = COMPETENCE_USAGE; that is, when categorizing competences under the relevant competence categories.

** Please note the following API names were changed in the March Family Pack 2003 (FP.E):

- The old hr_grade_api, pygrrapi.pkh, has been renamed to hr_grade_rate_value_api.
- A new hr_grade_api, pergrdapi.pkh, has been added.
- The old hr_pay_scale_api, pypsrapi.pkh, has been renamed to hr_pay_scale_value_api.
- The pay_pap_api api has been withdrawn and replaced by hr_accrual_plan_api (hrpapapi.pkh)

Key to Localization Codes

- AT - Austria
- AU - Australia
- BE - Belgium
- CA - Canada
- CN - China
- DE - Germany
- DK - Denmark
- ES - Spain
- FD - US Federal
- FI - Finland
- FR - France
- GR - Greece
- HK - Hong Kong
- IE - Ireland
- IN - India
- IT - Italy
- JP - Japan
- LU - Luxembourg
- MX - Mexico
- MY - Malaysia
- NL - Netherlands
- NZ - New Zealand
- PT - Portugal
- SA - Saudi Arabia
- SE - Sweden
- SG - Singapore
- UK - United Kingdom

- US - United States
- WW - All Legislations

APIs Available for HR Foundation Users

Application Programmatic Interfaces (APIs) are a logical grouping of all external process routines. The Oracle HRMS API strategy delivers a set of PL/SQL packages procedures and functions that provide an open interface to the database.

Further information on the purpose of each API is available in the API package header. For information on how to call APIs, see the technical essay APIs in Oracle HRMS, *Oracle HRMS Implementation Guide*. See also the *Oracle Applications System Administrator's Guide*.

See also:

- Publicly Callable Business Process APIs in iRecruitment, *Oracle iRecruitment Implementation Guide*
- Publicly Callable Business Process APIs in Oracle Training Administration, *Implementing Oracle Learning Management*
- Publicly Callable Business Process APIs in Oracle Time & Labor, *Oracle Time & Labor Implementation and User Guide*

The following table shows the APIs delivered with Oracle Foundation.

Important: This list includes all the supported APIs in Oracle HRMS, including HR, Payroll, and Standard and Advanced Benefits. Any APIs not included in this list are for internal use only and are *not* supported.

Note: Note: Legislation WW = All Legislations

These APIs are supported for HR Foundation users:

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_competence_element_api	pecelapi.pkh	create_competence_element	Yes	Yes	WW
hr_competence_element_api	pecelapi.pkh	delete_competence_element, update_competence_element	No	Yes	WW
hr_competence_element_api	pecelapi.pkh	update_personal_comp_element	No	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_competences_api	pecpnapi.pkh	create_competence, update_competence	Yes	Yes	WW
hr_employee_api	peempapi.pkh	create_employee	Yes	Yes	WW
hr_employee_api	peempapi.pkh	re_hire_ex_employee	Yes	Yes	WW
hr_hierarchy_element_api	peoseapi.pkh	create_hierarchy_element	Yes	Yes	WW
hr_hierarchy_element_api	peoseapi.pkh	delete_hierarchy_element, update_hierarchy_element	No	Yes	WW
hr_job_api	pejgobapi.pkh	create_job	Yes	Yes	WW
hr_location_api	hrlocapi.pkh	create_location, update_location	Yes	Yes	WW
hr_location_api	hrlocapi.pkh	delete_location	No	Yes	WW
hr_organization_api	hrorgapi.pkh	create_bgr_classif,	No	No	WW
hr_organization_api	hrorgapi.pkh	create_business_group	Yes	No	WW
hr_organization_api	hrorgapi.pkh	create_legal_entity,	No	No	WW
hr_organization_api	hrorgapi.pkh	create_legal_entity_classif	No	No	WW
hr_organization_api	hrorgapi.pkh	create_oper_unit_classif	No	No	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_organization_api	hrorgapi.pkh	create_operating_unit	No	No	WW
hr_organization_api	hrorgapi.pkh	create_org_classification	Yes	Yes	WW
hr_organization_api	hrorgapi.pkh	create_org_information	No	Yes	WW
hr_organization_api	hrorgapi.pkh	create_org_manager	No	No	WW
hr_organization_api	hrorgapi.pkh	create_organization, update_organization	Yes	Yes	WW
hr_organization_api	hrorgapi.pkh	delete_org_manager	No	Yes	WW
hr_organization_api	hrorgapi.pkh	delete_organization	No	Yes	WW
hr_organization_api	hrorgapi.pkh	disable_org_classification, enable_org_classification	No	No	WW
hr_organization_api	hrorgapi.pkh	trans_org_name	No	No	WW
hr_organization_api	hrorgapi.pkh	update_org_information	No	Yes	WW
hr_organization_api	hrorgapi.pkh	update_org_manager	No	No	WW
hr_person_address_api	peaddapi.pkh	create_person_address, update_person_address	Yes	Yes	WW

Package Name	File Name	Business Process	Supported by Data Pump	User Hooks	Legislation
hr_phone_api	pephnapi.pkh	create_phone, update_phone	Yes	Yes	WW
hr_phone_api	pephnapi.pkh	delete_phone	No	Yes	WW
hr_pos_hierarchy_ele_api	pepseapi.pkh	create_pos_hierarchy_ele, update_pos_hierarchy_ele, delete_pos_hierarchy_ele	No	Yes	WW
hr_position_api	peposapi.pkh	create_position, update_position, delete_position	Yes	Yes	WW
hr_rating_levels_api	pertlapi.pkh	create_rating_level, delete_rating_level	No	Yes	WW
hr_rating_levels_api	pertlapi.pkh	update_rating_level	Yes	Yes	WW
hr_rating_scales_api	perscapi.pkh	create_rating_scale, update_rating_scale	Yes	Yes	WW
hr_rating_scales_api	perscapi.pkh	delete_rating_scale	No	Yes	WW
hr_valid_grade_api	pevgrapi.pkh	create_valid_grade	Yes	Yes	WW
per_job_group_api	pejgrapi.pkh	create_job_group, update_job_group	Yes	Yes	WW
per_job_group_api	pejgrapi.pkh	delete_job_group	No	Yes	WW

For more information about APIs, see: *APIs in Oracle HRMS, Oracle HRMS Configuring, Reporting, and System Administration Guide*

APIs to Which Restrictions Apply for HR Foundation

You can perform the following tasks using the APIs listed, however you must only use the restricted list of parameters as shown in the following tables:

hr_employee_api

To create an employee call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peempapi.pkh	hr_employee_api	create_employee	None	p_validate p_hire_date p_business_group_id p_last_name p_previous_last_name p_mailstop p_office_number p_internal_location p_correspondence_language p_known_as p_sex p_date_of_birth p_email_address p_employee_number p_expense_check_send_to_address p_first_name p_middle_names p_national_identifier p_title p_work_telephone p_attribute_category p_attribute1-30

To re-hire an ex-employee call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peempapi.pkh	hr_employee_api	re_hire_ex_employee	None	p_validate p_hire_date p_person_id p_object_version_number

hr_contingent_worker_api

To create a contingent worker call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
pecwkapi.pkh	hr_contingent_worker_api	create_cwk	None	p_validate p_business_group_id p_last_name p_email_address p_npw_number p_first_name p_middle_names p_previous_last_name p_mailstop p_title p_known_as p_work_telephone p_start_date p_sex p_date_of_birth p_national_identifier p_office_number p_internal_location p_correspondence_language p_attribute_category p_attribute1-30

To terminate a contingent worker's placement call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
pecwkapi.pkh	hr_contingent_worker_api	terminate_placement	p_effective_date must be set to the system date. p_final_process_date and p_last_standard_process_date should be set to the same date as p_actual_termination_date	p_effective_date p_final_process_date p_last_standard_date p_validate p_person_id p_date_start p_object_version_number p_actual_termination_date p_projected_termination_date

To reverse a placement termination call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
pecwkapi.pkh	hr_contingent_worker_api	reverse_terminate_placement	p_effective_date must be set to the system date.	p_effective_date p_validate p_person_id p_actual_termination_date p_clear_details

hr_person_api

To update an employee or contingent worker's personal information call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peperapi.pkh	hr_person_api	update_person	p_effective_date must be set to the system date. p_datetrack_update_mode must be set to CORRECTION.	p_effective_date p_datetrack_update_mode p_validate p_hire_date p_business_group_id p_last_name p_sex p_date_of_birth p_email_address p_employee_number p_npw_number p_expense_check_send_to_address p_title p_first_name p_middle_names p_national_identifier p_previous_last_name p_known_as p_mailstop p_office_number p_internal_location p_correspondence_language p_work_telephone p_attribute_category p_attribute1-30 p_object_version_number p_party_id

hr_ex_employee_api

To terminate an employee call the following API:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peexeapi.pkh	hr_ex_employee_api	actual_termination_emp	None	p_validate p_period_of_service_ id p_object_ version_number p_actual_termination_date

followed by

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peexeapi.pkh	hr_ex_employee_api	final_process_emp	p_final_process_date must be the same date as was set for the p_actual_termination_date in the actual_termination_emp API.	p_final_process_date p_actual_termination_date p_validate p_period_of_service_id p_object_version_number

hr_assignment_api

To update an employee's assignment or a contingent worker's assignment, call one of the following APIs:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peasgapi.pkh	hr_assignment_api	update_emp_asg	p_effective_date must be set to the system date. p_datetrack_update_mode must be set to CORRECTION. When trying to perform a correction to an employee's supervisor, the new supervisor must exist for the entire duration of the employee's assignment. If you want to assign a supervisor who does not exist for the entire duration of the assignment, then you can do this using the Enter Employee window.	p_effective_date p_datetrack_update_mode p_validate p_assignment_id p_supervisor_id p_object_version_number p_assignment_number p_default_code_comb_id p_set_of_books_id p_title p_ass_attribute_category p_ass_attribute1-30
peasgapi.pkh	hr_assignment_api	update_emp_asg_criteria	p_effective_date must be set to the system date. p_datetrack_update_mode must be set to CORRECTION.	p_effective_date p_datetrack_update_mode p_validate p_assignment_id p_object_version_number p_position_id p_job_id p_organization_id p_location_id

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peasgapi.pkh	hr_assignment_api	update_cwk_asg	p_effective_date must be set to the system date. p_datetrack_update_mode must be set to CORRECTION.	p_effective_date p_datetrack_update_mode p_validate p_assignment_id p_object_version_number p_assignment_number p_supervisor_id p_title p_set_of_books_id p_vendor_id p_vendor_employee_number p_manager_flag p_employment_category p_ass_attribute_category p_ass_attribute1-30
peasgapi.pkh	hr_assignment_api	update_cwk_asg_criteria	p_effective_date must be set to the system date. p_datetrack_update_mode must be set to CORRECTION.	p_effective_date p_datetrack_update_mode p_validate p_assignment_id p_object_version_number p_position_id p_job_id p_organization_id p_location_id

hr_position_api

To update a position call the following API. Note that there are two position APIs, one for full HRMS users and one for HR Foundation users. Refer to the comments in peposapi.pkh for details about these APIs.

File Name	Package Name	Business Process	Special Instructions	Available Parameters
peposapi.pkh	hr_position_api	create_position update_position delete_position	None	You can use all of the parameters in the version of this API that is specifically for HR Foundation users.

hr_competence_element_api

To create, update and delete personal competencies call one of the following APIs:

File Name	Package Name	Business Process	Special Instructions	Available Parameters
pecelapi.pkh	hr_competence_element_api	create_competence_element	p_effective_date must be set to the system date. p_type must be set to PERSONAL.	p_effective_date p_type p_validate p_business_group p_competence_id p_proficiency_level p_rating_level p_person_id p_effective_date_from p_effective_date_to p_source_of_proficiency_level p_certification_date p_certification_method p_next_certification_date p_comments p_attribute_category p_attribute1 - 20 p_party_id
pecelapi.pkh	hr_competence_element_api	update_competence_element	p_effective_date must be set to the system date.	p_effective_date p_competence_element_id p_object_version_number p_validate p_proficiency_level p_rating_level p_effective_date_from p_effective_date_to p_source_of_proficiency_level p_certification_date p_certification_method p_next_certification_date p_comments p_attribute_category p_attribute1 - 20 p_party_id

File Name	Package Name	Business Process	Special Instructions	Available Parameters
pecelapi.pkh	hr_competence_element_api	update_personal_comp_element	p_effective_date must be set to the system date. This API automatically maintains an historical record of the old competence profile entry if the effective date and proficiency level have changed. The old competence profile entry is end dated and a new competence profile record is created.	p_effective_date p_competence_element_id p_object_version_number p_validate p_proficiency_level p_effective_date_from p_effective_date_to p_source_of_proficiency_level p_certification_date p_certification_method p_next_certification_date p_comments p_attribute_category p_attribute1 - 20
pecelapi.pkh	hr_competence_element_api	delete_competence_element	None	p_competence_element_id p_object_version_number p_validate

Info Online Links to Information Provider Websites

Info Online Links to Information Provider Websites

Oracle HRMS provides the capability to enable context-sensitive links between Oracle HRMS windows and web pages, and information provider websites. Once the links have been enabled, users can access an information provider website directly from a button or link on an Oracle HRMS window or self-service web page. Depending on the level of configuration available, the link can lead directly to a page relevant to the window or even the record on which the user is working.

For example, someone entering tax information might access a website providing up-to-date information on tax regulations, or an administrator looking at benefit details for an employee could open a web page providing documentation for that employee's benefit plan.

Note: Info Online was previously known as the Knowledge Integrator.

Accessing Information Provider Websites

There are two supported versions of Info Online. The system administrator sets the version to use in the HR: KI Framework Version profile. The default value for this profile is Version 1.

If the system administrator sets the profile to Version 1, users can access:

- RIA (Research Institute of America) through the user interface for some payroll forms
- Authoria, a provider of health insurance and compensation information, through links on some Benefits self-service web pages
- Metalink, Oracle's support website, through the Info Online button from the user interface

If the system administrator sets the profile to Version 2, users can access:

- Metalink on self-service web pages in which the content container has been included
- Transcentive through the Tools menu from the user interface
- iLearning through the content container on Rapid Implementation Workbench self-service web pages

In both versions, login to the information provider website is usually handled automatically when the user logs into Oracle HRMS.

Once the system administrator has enabled the links between Oracle HRMS and the information provider pages, users access information provider websites from the user interface by clicking the Info Online button on the Oracle HRMS toolbar, or by selecting Tools > Info Online from the menu (Shift+Control+F7). This button is enabled in windows for which information provider links have been configured and enabled.

Note: Shift+Control+F7 is the key sequence currently mapped to Function 7. Choose Help -> Keyboard on the menu to determine the actual key combination. The *Oracle Forms Deployment Guide* explains how to change this key assignment in the Oracle Terminal resource file `fmrweb.res`.

Choosing the Info Online button first opens a list of values, displaying a list of links to any information provider websites that are enabled for the current window. When the user selects a value from the list, a browser window opens at the appropriate page.

If the user chooses the Info Online button from a window for which no links to information provider websites are enabled, no list of values appears.

Users can control the behavior of the Info Online button using the Open in New Window option on the Tools menu. When this option is checked, each new search opens in a new browser window. This option allows users to compare results from different queries side by side, but the windows remain open until the user specifically closes them. When this option is unchecked, the page appears in the last browser window opened.

Users access information provider websites from the self-service web pages either through links on Benefits pages or through the content container. The list of applicable topics and providers appear alphabetically in the content container. See: Info Online Content Container, page 3-163

Profile Options

You must set the following profile options to set up links between Oracle HRMS and any information provider websites:

- HR: KI Framework Version
- HR: Extension Agent Enabled
- HR: Extension Agent Client Timeout

Setting the following additional profile options is optional if you are setting up links between Oracle HRMS and any information provider websites:

- HR: Extension Agent
- HR: Info Online: Open in New Window
- HR: Info Online: Toolbar Icon
- HR: KI Maximum Topics and Integrations
- HR: Servlet Timeout

Additional required and optional profile options exist for individual information providers. See: User Profiles, page 1-46

Information Providers

Integration is available between Oracle HRMS and the following information providers:

Oracle MetaLink

Oracle's MetaLink website provides access to the latest product information, discussion forums, bug fixes, and patch information for Oracle HRMS, as well as enabling users to contact Oracle Support. Integration is available for all Oracle HRMS windows in the user interface in KI Framework Version 1 and for self-service web pages which include the content container in KI Framework Version 2. This integration is available for all legislations.

See MetaLink Note 229585.1 for details of how to set up links from Oracle HRMS to MetaLink pages.

Authoria HR

Integration is available between a number of Oracle Advanced Benefits windows and self-service pages and the third-party product Authoria HR in KI Framework Version 1. This integration is available for UK and US legislations. See: [Links to Authoria HR](#), page 3-164

Also see MetaLink Note 215637.1 for details of how to set up links from Oracle HRMS to Authoria HR pages.

RIA PCP on Checkpoint

Integration is available between Oracle HRMS US tax windows and third-party information provider RIA's Payroll Compliance Pro on Checkpoint in KI Framework Version 1. This integration is available for US legislations.

See MetaLink Note 148468.1 for further details of how to set up links from Oracle HRMS to RIA PCP on Checkpoint.

Transcensive

Integration is available between Oracle HRMS windows and Transcensive, a third-party compensation management solutions provider, in KI Framework Version 2. This integration is available for all legislations.

See MetaLink Note 276574.1 for further details of how to set up links from Oracle HRMS to Transcensive.

iLearning

Oracle iLearning is an enterprise learning management system that prescribes, delivers and tracks learning, and monitors and manages the learning process. Integration is available between the Rapid Implementation Workbench web pages and Oracle iLearning in KI Framework Version 2.

See MetaLink Note 276807.1 for further details of how to set up links from the Rapid Implementation Workbench web pages to Oracle iLearning.

Info Online Content Container

The Info Online content container is an ancillary region that appears on self-service web pages. Topics and providers appear as an alphabetical list of links in the content container.

On clicking a topic, the list of providers who provide content for the topic appears in a new window. If only one provider exists for the selected topic, the single provider's page opens immediately.

Users can also select a provider from the list in the content container, and view a list of topics offered by that provider.

The More link appears when the number of topics or providers exceeds a predefined limit. The limit of topics or providers is set in the HR: KI Maximum Topics and Integrations profile. If no limit is set, the More link appears when the number of topics or providers exceeds 3. On clicking the More link from the topics or providers region, the complete set of topics or providers appears in a new page.

Info Online Links to Authoria HR

Authoria HR uses a common knowledge repository to manage and communicate HR and benefits information. You can configure context-sensitive access between Oracle HRMS and Authoria HR. End users can follow links from the user interface windows and self-service pages to display Authoria HR documentation directly related to the record they are working with.

This feature is available for US and UK legislations.

Note: Info Online was previously known as the Knowledge Integrator.

Links from Oracle Windows and Self-Service Pages

Integration with Authoria HR is enabled for the following Oracle Standard and Advanced Benefits windows:

- View Enrollment Results window (BENDSPER)
- View Participation Information window (BENDISPL)
- Flex Program window (BENEFXEB)
- Non-Flex Program window (BENENFEB)
- Savings Plan window (BENESPEB)
- Miscellaneous Plan window (BENEMSEB)
- Person Life Events window (BENDSPLE)

Integration is also enabled for the following self-service pages:

- Benefits Enrollment Overview page (BEN_ENRL_OVERVIEW_PAGE)
- Current Benefits page (BEN_CURR_OVW_PAGE)
- Confirmation page (BEN_ENRL_CONF_PAGE)
- Benefits Selection page (BEN_ENRT_SELECTION_PAGE)

Accessing Authoria HR

Access to Authoria HR is available in user interface windows from the Info Online button on the toolbar or the Info Online option on the Tools menu (Shift+Control+F7).

When a user chooses the Info Online button in one of the windows in which the feature is enabled, a list of values appears, listing the pages in the Authoria HR system applicable to the current context. If other Information Provider links have been enabled, these are also displayed. When the user selects an Authoria link from the list of values, a browser window opens at the appropriate Authoria HR page.

Users can control the behavior of the Info Online button using the Open in New Window option on the Tools menu. When this option is checked, each new search opens in a new browser window. This allows users to compare results from different queries side by side, but they must close each window when finished. When this option is unchecked, the the last browser window that was opened is used to display the Authoria HR page.

From the self-service interface, access to Authoria HR is via hypertext links in the Oracle Standard and Advanced Benefits pages. The links appear only when there is a mapping between the page and a page in the Authoria HR system. When a user clicks

on a link, a new browser window opens and displays the page from the Authoria HR system applicable to the current context.

See: Configuring Links Between Oracle HRMS and Authoria HR, page 3-167

Example SQL Script to Populate Mapping Table

This example script configures links between Oracle benefit plans and programs and Authoria HR pages. See Configuring Mappings Between Oracle and Authoria HR, page 3-168 for information on how to configure this script for your own use.

The script assumes that there are no mappings stored in the table to begin with. The mappings are business group-specific. Each plan/program combination results in two mappings, one for open enrollment and the other for non-open enrollment. The open enrollment mapping is typically to a common open enrollment page.

The script shows the following four mappings:

- A plan named 'ACME Dental NonFlex' exists in the program 'ACME Program NonFlex'. This is mapped to the Authoria page 'AnnEnroll' during open enrollment, and at other times to the page 'Dental'. This results in the procedure call for non-open enrollment:

```
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'N','Dental',l_business_group_id);
```

- and for open enrollment:

```
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'Y','AnnEnroll',l_business_group_id);
```

- A plan 'Saving Plan', that is not in a program, is mapped to the Authoria page 'AnnEnroll' during open enrollment, and at other times to the page 'Sav'. This results in the procedure call for non-open enrollment:

```
create_page_map('Saving Plan',NULL,
               'N','Sav',l_business_group_id);
```

- and for open enrollment:

```
create_page_map('Saving Plan',NULL,
               'Y','AnnEnroll',l_business_group_id);
```

Example Script

```
REM +=====+
REM SQL Script File Name : create_page_map.sql
REM Description: Seed Authoria page mappings via APIs
REM +=====+
declare
l_business_group_id number;
procedure create_page_map
(p_plan_name          in      varchar2
,p_program_name       in      varchar2
,p_open_enrollment_flag in    varchar2
,p_target_page        in      varchar2
,p_business_group_id  in      number
```

```

) is
--
l_authoria_mapping_id number;
l_object_version_number number;
l_plip_id number := null;
l_pl_id number;
l_pgm_id number := null;
-- value -924926578 represents a number unlikely to
-- exist in the database
cursor csr_exists is
    select authoria_mapping_id,
           object_version_number
    from   hr_authoria_mappings
    where  pl_id = l_pl_id
           and nvl(plip_id, -924926578) = nvl(l_plip_id, -924926578)
           and open_enrollment_flag = p_open_enrollment_flag;
begin
-- get pl_id
select pl_id
into l_pl_id
from ben_pl_f
where sysdate between effective_start_date
               and effective_end_date
and name = p_plan_name
and business_group_id = p_business_group_id;
if (p_program_name is not null) then
    -- get pgm_id
    select pgm_id
    into l_pgm_id
    from ben_pgm_f
    where sysdate between effective_start_date
                   and effective_end_date
          and name = p_program_name
          and business_group_id = p_business_group_id;
    select plip_id
    -- get plip_id
    into l_plip_id
    from ben_plip_f
    where sysdate between effective_start_date
                   and effective_end_date
          and pl_id = l_pl_id
          and pgm_id = l_pgm_id
          and business_group_id = p_business_group_id;
end if;
-- see if there is an existing record
open csr_exists;
fetch csr_exists into l_authoria_mapping_id
                    , l_object_version_number;
if csr_exists%found then
    -- do update
    HR_AUTHORIA_MAPPING_API.update_authoria_mapping
    (
        p_authoria_mapping_id      => l_authoria_mapping_id
        , p_pl_id                  => l_pl_id
        , p_plip_id                => l_plip_id
        , p_open_enrollment_flag   => p_open_enrollment_flag
        , p_target_page            => p_target_page
        , p_object_version_number  => l_object_version_number
    )

```

```

    );
else
  -- do insert
  HR_AUTHORIA_MAPPING_API.create_authoria_mapping
  (
    p_pl_id                => l_pl_id
  , p_plip_id              => l_plip_id
  , p_open_enrollment_flag => p_open_enrollment_flag
  , p_target_page          => p_target_page
  , p_authoria_mapping_id  => l_authoria_mapping_id
  , p_object_version_number => l_object_version_number
  end if;
  );
close csr_exists;
end;
--
BEGIN
--
select business_group_id
into l_business_group_id
from per_business_groups
where name = 'SC Benefits';
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'N','Dental',l_business_group_id);
create_page_map('ACME Dental NonFlex','ACME Program NonFlex',
               'Y','AnnEnroll',l_business_group_id);
create_page_map('Saving Plan',NULL,
               'N','Sav',l_business_group_id);
create_page_map('Saving Plan',NULL,
               'Y','AnnEnroll',l_business_group_id);
--
END;
/
COMMIT;
EXIT;

```

Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR

You can configure links between Oracle Standard and Advanced Benefits windows and self-service pages and Authoria HR. See: Info Online Links to Authoria HR, page 3-164

To Configure Links Between Oracle Standard and Advanced Benefits and Authoria HR:

1. You must first install the required versions of Oracle HRMS and Authoria HR. For further details on installation and implementation, see Metalink Note 215637.1.
2. Ensure that the following profile options are set:
 - HR: Extension Agent Enabled
 - HR: Authoria Integration Enabled
 - HR: Authoria US URL *and/or* HR: Authoria UK URL

3. Check the following optional profile options to see whether you should set them for your system:
 - HR: Extension Agent
 - HR: Info Online: Open in New Window
 - HR: Info Online: Toolbar IconFor further details of profile options, see: User Profiles, page 1-46
4. Set up your Oracle benefit plans and programs.
5. Set up your Authoria HR benefit plans. For further details, see your Authoria HR documentation.
6. Configure mappings between Oracle and Authoria HR, page 3-168

Configuring Mappings between Oracle and Authoria HR

Before users can access Authoria HR pages from Oracle HRMS windows or self-service web pages, you must configure the mappings between your Oracle HRMS benefits and the pages you have set up in Authoria HR.

To Configure Mappings:

1. Identify the pages in Authoria HR that you want to link to each of your Oracle benefit plans and programs.
2. Edit the following select statement in the example SQL script, page 3-165 to include the appropriate business group by replacing "SC Benefits" with the required business group name:

```
select business_group_id
into l_business_group_id
from per_business_groups
where name = 'SC Benefits';
```

3. For each mapping, add a create_page_map procedure, replacing the example create_page_map procedure lines. Add a separate line for each mapping.

The create_page_map procedure takes the following arguments:

Mapping Arguments

Procedure	Description
p_plan_name	the name of the benefits plan
p_program_name	the name of the benefits program (null if the plan is not in a program)
p_open_enrollment_flag	indicates whether the page mapped to is for open enrollment. Allowed values are Y or N.
p_target_page	the name of the target page in the Authoria application
p_business_group_id	the business group id, as determined using the select statement

4. Run the SQL script.

The script calls the HR_AUTHORIA_MAPPING API, which saves the mappings in the Oracle database table HR_AUTHORIA_MAPPINGS.

Link Windows (Task Flow)

Task Flow

You can link windows used to complete tasks in a *task flow*. Then, you can choose a button to bring up each window in turn without returning to the menu.

The first window in the task flow defines the *context* of the subsequent windows. For example, if the task flow begins with the People window, all subsequent information is entered for the person you enter or query in the People window.

You can include configured windows in task flows. For example, you might create a version of the People window that handles applicants only. You could then use this window in a recruitment task flow. Or you might configure a People Management template and add task flow buttons to provide access to other windows.

Using Forms or Workflow

There are two methods you can use to create and maintain your task flows:

- Using Forms, page 3-176
- Using Oracle Workflow, page 3-175

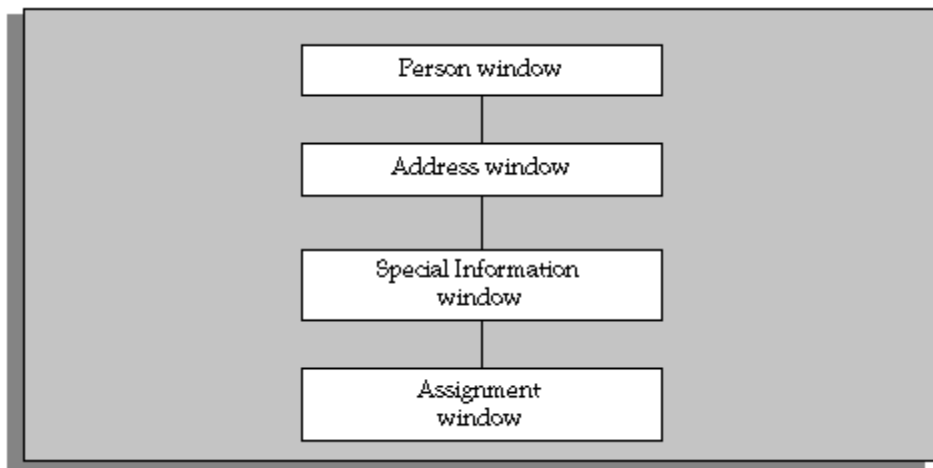
You can model your task flows using Oracle Workflow (version 2.0.3.8.1 or higher) then generate a task flow. This method of creating task flows has the advantage of using a diagrammer to help you design the sequence of windows.

Caution: Do not use apostrophes or "%" symbols in task flow names or task flow node names.

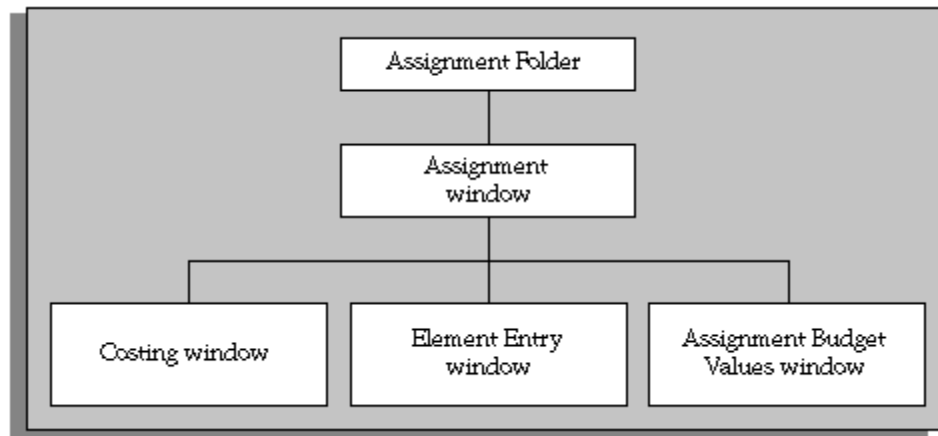
Sequential or Branched Structure

Task flows can follow a sequential or a branched structure, as shown in the following two figures. You can choose how many navigation options users have from each window in the task flow. You can also choose the labels that appear on the navigation buttons, and you can define access keys.

Sequential Task Flow



Branched Task Flow



Predefined Task Flows

Oracle HRMS supplies several predefined task flows that include all the windows that you can use in task flows. They are designed as a simple structure to use during implementation, not as a recommended structure for users.

Predefined task flows are translated into your base language when you install Oracle HRMS. However, if you install an additional language, you need to create new versions of your task flows in that language. You can then link these to the correct menu for the language.

When you install a new version of Oracle HRMS, any changes you have made to the standard task flows supplied by Oracle are removed.

Important: If you have made any changes to standard task flows, you will need to recreate them in each new version of the software. It is therefore recommended that if you wish to make changes to task flows, you do so by copying a standard task flow and making changes to the copy.

Transferring Task Flows Between Databases

You can transfer a task flow you have created using Forms or Workflow from one database to another; for example, to add new task flows you have created in a test database into your production database. You do this by saving the task flow from the first database to a file, then importing the file to the second database. See *Transferring Task Flows*, page 3-184.

Legislation-specific Task Flows

When installing Oracle HRMS, you can install only global task flows and task flows specific to the legislation you have installed.

Note: This does not include US- and UK-specific task flows, which are installed with all legislations.

When defining a new task flow, you must specify that the task flow is global or that it is specific to a legislation you have installed.

See Defining Task Flows, page 3-177

Note: Task flows created by converting from Oracle Workflow are always global.

When downloading task flows, you can download only global task flows and task flows specific to the legislation(s) you have installed.

See Transferring Task Flows Between Databases, page 3-184

Task Flow Windows

You can create your own task flows by referencing the windows listed in the table below, or configured versions of them. Some of these windows require the context of an assignment. This means that one of the following windows must appear above them in the task flow:

- Assignment window
- Assignments Folder window
- Application window (for applicant assignments)
- a People Management template window that identifies assignments

All task flows must begin with one of the following windows:

- A Maintenance window created from a People Management template
- People and Assignment (PERWSHRG)
- People (PERWSEPI)
- People Folder (PERWSFPE)
- Assignments Folder (PERWSFAS)
- Assignment (PERWSEMA)
- Job (PERWSDJT)
- Position (HRWSPSF)
- Position (non HRMS users) (PERWSDPO)
- Location (PERWSLOC)
- Collective Agreements (PERWSDCA)
- Tax Balance (PAYUSTBA)

Note: If you are not using People Management templates, use the combined People and Assignment form (PERWSHRG), rather than the separate forms (PERWSEPI and PERWSEMA), to allow the Assignment window to open more quickly from the People window. We recommend that you use the combined form in any task flow that requires both windows. The predefined task flows use the combined form.

Windows You Can Use in Task Flows

Window	Context Required
Absence Detail	Person (employee)
Address	Person
Adjust Balances (Oracle Payroll)	Assignment (employee)
Agreement and Grade Results	Assignment (employee)
Applicant Interview	Assignment (applicant)
Application	Person (applicant)
Assignment	Person (employee)
Assignment Budget Values	Assignment
Assignments Folder	None
Assignment Rates	Assignment (contingent worker)
Belgian Tax Information (Belgian legislation only)	Assignment (employee)
Beneficiaries (US legislation only)	Element entry
Book Events	Person (employee or applicant)
COBRA (US legislation only)	Assignment (employee)
Competence Profile	Person
Contact	Person
Contract	Person
Costing	Assignment (employee)
Covered Dependents (US legislation only)	Element entry
Disability (global and selected legislations)	Person
Element Entries	Assignment (employee)
Employee Review	Assignment (employee)
Employee Tax Rules (US Oracle Payroll)	Assignment (employee)
Employment Declaration (Australian legislation only)	Assignment (employee)
End Placement	Person (contingent worker)

Window	Context Required
External/Manual Payments (Oracle Payroll)	Assignment (employee)
Extra Assignment Information	Assignment (employee or applicant)
Extra Job Information	Job
Extra Location Information	Location
Extra Person Information	Person (employee or applicant)
Extra Position Information	Position
Grade Step Placement	Assignment (employee)
Medical Assessment (global and selected legislations)	Person
P45 (UK Oracle Payroll)	Assignment (employee)
People Folder	None
People	None
People Management template Maintenance window	None
Performance	Assignment (employee)
Personal Payment Method	Assignment (employee)
Phone Numbers	Person
Picture	Person
Position	None
Position Occupancy	Position
Qualifications	Person
QuickPay (Oracle Payroll)	Assignment (employee)
Reverse Payroll Run (Oracle Payroll)	Assignment (employee)
Salary Administration	Assignment (employee)
Salary History	Assignment (employee)
Schools and Colleges (Establishment Attendances)	Person
Secondary Statuses	Assignment
SOE Report (UK Oracle Payroll)	Assignment (employee)

Window	Context Required
Special Information	Person
Statement of Earnings (Australian and New Zealand legislations)	Assignment (employee)
Statutory Details (UK Oracle Payroll)	Assignment (employee)
Terminate	Person (employee)
Terminate Applicant	Person (applicant)
View Element Entry History	Assignment (employee)
View Employee Accruals (US legislation only)	Assignment (employee)
View Employee Benefits (US legislation only)	Assignment (employee)
View Employee Earnings & Deduction Balances (US Oracle Payroll)	Assignment (employee)
View Employee Tax Balances (US Oracle Payroll)	Assignment (employee)
View SOE (US Oracle Payroll)	Assignment (employee)
Work Choices (Job or Position)	Job or Position
Work Choices (Person)	Person
Work Incident (global and selected legislations)	Person

Including the Assignment Window

When users move down a task flow from the combined People and Assignment form, the Assignment window remains visible in the background. They can return to the Assignment window by closing their current window. Therefore you should not define a button to call the Assignment window.

However, if you are defining a task flow to the Assignment window from any window except the People window, you should use the Assignment form (PERWSEMA). In this case you can add an Assignment button to any forms below the Assignment window in the task flow. This enables users to return to the Assignment window without going back to the top window.

Task Flow (Oracle Workflow)

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

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

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

Key Rules

There are two key rules in defining task flows:

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

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

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

For example, the Position Occupancy window requires the context of a position, while the Qualifications window requires the context of a person. Each workflow activity supplied for a window has its Result Type set to a lookup type that defines the context that must be passed to it. For example, the F4 Enter Address window has the Result Type set to Person Context Windows. This means it must be given the context of a person.

Task flows are associated with one of the following contexts:

- Assignment
- Element Entry
- Job
- Location
- Request for Personnel Action (US Federal HR)
- People
- Position Description (US Federal HR)
- Position
- Top node HRMS windows

Creating Task Flows Using Forms

Complete the following steps to create task flows using forms:

1. Define Task Flow Nodes, page 3-177
2. Define Task Flows, page 3-177

You can also complete these optional steps, if required:

3. Copy an Existing Task Flow, page 3-179
4. Add a New Window to an Existing Task Flow, page 3-179
5. Amend the Navigation of a Task Flow, page 3-179

Defining Task Flow Nodes

Each form in a task flow is a *node*. There are predefined nodes for every form that you can include in a task flow. However, if you create a configured version of one of these forms, you must create a node for the configured version before you can include it in a task flow.

Tip: If you want to use a configured form as the first node in a task flow you should define this as a new node.

You could add both the task flow and the configured form as arguments to a single menu function but this may be more difficult to maintain.

You create nodes in the Define Task Flow Nodes window.

To create a task flow node:

1. Enter a name for the node. You select this name when you create a task flow containing the node. It is not visible to users.

Caution: Do not use apostrophes or "%" symbols in the node name.

2. Select the name of the form that you configured. Leave the Block field blank.
3. Select the name of the configured version of the form that you created.
4. Save the new node.

Defining Task Flows

You define task flows in the Define Task Flow window. If there is a similar existing task flow, you can copy it to form the basis of your new flow.

Tip: When defining the navigation buttons in your task flows:

- Do not define long sequences where you cannot go back to the previous step
- Use the same button names for the same nodes
- Use different button names for configured nodes

Before you can include the task flow in a menu, you must define a new menu function for the first form in the task flow with the following argument in the Parameters field:

`WORKFLOW_NAME = "task flow name"`

To define a new task flow:

1. Enter a name for the task flow and save it.

Caution: Do not use apostrophes or "%" symbols in task flow names.

Note: Do not choose the Convert button. This is provided only for converting task flows you created in Oracle Workflow. See: Creating Task Flows Using Workflow, page 3-180

2. Select a legislation for the task flow from the list of values, or leave the legislation field blank to create a global task flow.
3. In the Node block, select the name of the node that you want to be the first form in the task flow.
4. For this node, select the Top Node check box.
5. Create a new record in the Node block and select another node. You must create all the nodes for the task flow before you can begin entering the navigation paths between them.
6. In the Navigation Options region, for each node, select the other nodes to which you can navigate.
7. Enter a sequence number to determine the order in which the navigation options appear as buttons (from left to right) along the base of the window or as options in a navigation list.
8. Select the Button check box for the navigation options that should appear as buttons. There is a limit on the number of buttons that can appear on each form. This number varies from form to form.

The other options are displayed in a navigation list when the user chooses a button labelled Others. Or, if there is only one other option, this form displays when the user chooses a button labelled Next.

9. There is a default label that appears on buttons or in the navigation list for every form. You can override this with your own label.

If the label in the Define Task Flow window appears blue, this is the default value. It is a dynamic default: if the seeded value changes (for example, as the result of an upgrade), the label will be updated automatically in all task flows where it has not been overridden.

If the label appears black, the default value has been overridden. To re-inherit the default label, clear the field.

10. To define an access key (or keyboard shortcut) for a navigation option, precede the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, enter the label &Picture.

Note: Do not use the following letters, as they are used on the Oracle Applications menu: A, E, F, G, H, Q, S, W.

There is no validation to prevent the same letter being used more than once for a group of buttons.

11. Save the task flow.

Copying an Existing Task Flow

To copy an existing task flow:

1. Query the existing flow and choose the Copy To button.
2. Enter the name of the new task flow and choose OK.
3. Query your new task flow and edit it as required.

Adding a New Window to an Existing Task Flow

You can use the Define Task Flow window to add a new window, using its node name, to an existing task flow. If you have already used the window in the task flow you only have to amend the navigation, see: Amending the Navigation of a Task Flow, page 3-179

Note: If you have created a task flow using Oracle Workflow, you must continue to maintain it using Oracle Workflow. You cannot edit a generated task flow using the Define Task Flow window.

To add a new window to an existing task flow:

1. Query the task flow you want to amend in the Name field.
2. In the Node block, enter the window's node name.
3. Save your changes.

You must now include the node in the navigation path for the task flow.

4. Select the existing node you want the new node to be accessed from in the Node block.
5. Enter the new node's details in the Navigation Options region and edit the existing navigation path as required. For information about how to set up the Navigation Options region refer to steps 5 to 9 in "To define a new task flow", page 3-177.

Amending the Navigation of a Task Flow

Use the Define Task Flow window to amend the navigation of a task flow.

To amend the navigation of a task flow:

1. Query the task flow for which you want to amend the navigation in the Name field.
2. Select the node name in the Node block.
3. Edit the existing navigation path in the Navigation Options region, as required. For information on the Navigation Options refer to steps 5 to 9 in To define a new task flow, page 3-177.

Generating a Task Flow From Oracle Workflow

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

Use the Define Task Flow window from the HRMS application.

To generate a task flow from Oracle Workflow:

1. Query the task flow(s) you have created and choose the Convert button.
2. Choose OK to convert the task flows from Oracle Workflow.

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

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

Creating Task Flows Using Workflow

Complete the following steps to create task flows using Oracle Workflow:

1. Create a Top Level Process, page 3-180
2. Create Sub Processes, page 3-181
3. Create Button Labels, page 3-182
4. Position Button Display, page 3-183

Combined People and Assignment Form Only

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

5. Identify Windows or Blocks to Display, page 3-183

Configured Versions of Forms Only

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

6. Identify Configured Forms to Include in the Task Flow, page 3-184

All Forms

7. Verify and Save the Workflow, page 3-184
8. Generate a Task Flow From Oracle Workflow, page 3-179

Creating a Top Level Process

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

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

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

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

To create a top level process:

1. Enter a unique internal and display name for the new process for the HR Task flow item type.
Tip: Use a naming convention for Internal and Display names. For example, a good internal name might be POSITION_DETAILS_TL with a Display name of Position Details (Top Level).
2. Define the process as runnable.
3. Open the Process Diagrammer window and add one Start activity and at least one End activity.
4. Add a Top Node Selector activity. The Start activity must connect to the Top Node Selector activity.
5. Connect the Top Node Selector to the End activity with a <Default> transition result value.
6. Add the Top Node window.
7. Connect the Top Node Selector to the Top Node window, specifying the name of this window activity as the transition result value.
8. Connect the Top Node window to the End Activity with a <Default> transition result value.
9. Add other windows to the process, noting the following rules:
 - A window can only connect to another window where the result type is the same (such as, both Person Context windows).
 - The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).
 - Each window can only connect once to any other window.
 - Each window must be connected to the Top Node window with a <Default> transition result value.
 - You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Creating Sub Processes

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

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

To create sub processes:

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

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

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

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

5. Connect the Start activity to another window.

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

6. Add other windows to the process, noting the following rules:
 - A window can only connect to another window where the result type is the same (such as, both Person Context windows).
 - The transition result value must be the name of the window activity you are connecting to (for example, F4 Enter Assignment).
 - Each window can only connect once to any other window.
 - Each window must connect to an End Activity with a <Default> transition result value.
 - You can connect a window back to its parent using the <Parent> transition result value, rather than the name of the parent window.

Creating Button Labels

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

To create button labels:

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

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

Positioning Button Display

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

The number of task flow navigation buttons that can be displayed on a window varies from window to window. If there are too many navigation options for them all to appear as buttons, the last button on the window is called Other and it displays a list of values containing the other navigation options.

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

To position buttons:

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

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

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

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

Identifying Windows or Blocks to Display

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

To identify windows or blocks to display:

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

Identifying Configured Forms to Include in the Task Flow

If you have created a configured version of a window, you can use it in a task flow.

To identify configured forms to include in the task flow:

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

Verifying and Saving the Workflow

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

When you have successfully verified the Workflow, save it to the HRMS database.

To verify and save the Workflow:

1. Choose File - Verify.

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

2. Choose File - Save.

Transferring Task Flows Between Databases

You can transfer a task flow you have created in one database (using either Forms or Workflow) into another database; for example, to add a task flow created in a test database to a live database. You do this by exporting the task flow information from the first database to a flat file which you can then import to the second database.

You do this using the Submit Request window.

Important: Before transferring task flows into a database, you must ensure that all windows used by the task flow are present in the database. This includes any versions of windows that you have configured using CustomForm or the People Management Configurator.

To export a task flow to a file:

1. Log in to the source database.
2. In the Submit Request window, choose Download HRMS Taskflows from the list of values in the Name field.
3. Enter a name for the file in which to save the task flow in the Data File parameter field. The recommended file extension is .ldt.

Tip: To avoid having to move the file before importing it to the target database, include the full file path of a location that is accessible to both the source and target databases.

4. To download a single task flow, select the task flow name from the list of values (you can download all task flows for a legislation, or all global task flows, by leaving the task flow field blank).
5. To download task flows for a particular legislation, select the legislation from the list of values. To download global task flows, leave the legislation field blank.
6. Choose OK, then choose Submit, to save the task flow to a flat file.

To import a task flow from a file:

1. Log in to the target database.
2. In the Submit Request window, choose Upload HRMS Taskflows from the list of values in the Name field.
3. Enter the name of the file containing the task flow in the Data File parameter field.
4. Choose OK, then choose Submit, to import the task flow to the database.
5. You can now use the task flow in the same way as in your original database.

Configure Windows Using the People Management Configurator

People Management Configurator

You can use the People Management Configurator tool (formerly called Forms Configurator) to design windows that closely meet the business processes of your enterprise. For example, you can design windows to contain the essential information you need to hire a new person. This saves time, reduces errors, and makes data entry and maintenance easier.

Predefined templates are provided with Oracle HRMS. These are examples of windows that have been designed with specific processes in mind. The predefined People Management templates have been created using the People Management window. The example templates use selected items from this window. However, you can select any item from the People Management window when you create your own windows.

See People Management Templates, page 3-188.

Why Use a Predefined Template?

You can create new windows without using a predefined template but we recommend that you use one as a guide for the following reasons:

- The templates have been carefully designed to represent typical business processes and show a good implementation of window design.
- It makes it easier to upgrade to new predefined templates when they become available. When you upgrade a predefined template the system makes the necessary core updates but leaves any changes you have made to the template in place.

What Can I Change On a Template?

When you design a new window using a template, you can:

- Choose which component windows (Summary, Find, Maintenance) of the main window to display, and where they are positioned.
- Choose which window displays first when a user chooses the main window from the navigator.
- Select which tabs, fields, and buttons you want displayed on each window.
- Choose where fields are positioned, on which tabs they appear, and the field tabbing order.
- Choose to default values in fields.
- Use formulas to supply additional details about a field or button to be displayed when a user right-clicks on the item.
- Set up context-sensitive fields such as address styles so that the appropriate fields are displayed depending on a value chosen.
- Enable display of DateTrack History on datetracked fields.
- Define data restrictions such as Employees only, Applicants only or Contingent Workers only.

- Set up checklists for users to record the progress of actions. You can add values to the predefined lookups: CHECKLIST_ITEM and CHECKLIST_STATUS.
- Create notification messages for users to send workflow notifications to other people. Some messages are predefined.

Note: The online help reflects the predefined templates. If you configure the forms, you might need to edit the help to reflect the changes you make.

Additional Configuration Options For People Management Templates

A number of user extensible 'custom' fields have been added to the People Management templates which enable you to maintain any data that you cannot currently maintain using the templates (either Oracle E-Business Suite data items or 3rd party/custom data items that are stored within the database). These fields only apply to the People Management window (PERWSQHM form) and are only available on the 'MAINTAIN' block/window (not the summary or Find window).

You can add these custom fields to the People Management Configurator template via the Forms Configurator option. There are a number of different types of fields to accommodate different functional requirements. These fields are :

- Character
- Number
- Date
- Check Box
- List of Values
- List Item

These additional fields are referred to as items and they can be placed on to the template using the People Management Configurator (see Fields on the People Management Window, page 3-205 for further information).

When you have added the required custom items to the template, it is necessary to use the Custom Library to write the required business rule code and logic for the retrieval, update and validation of each custom item.

For further information please see the white paper *Further Configuration Options For People Management Templates* on MetaLink.

Setting Up Task Flows To Other Windows

You can add task flow buttons to access other windows from the Maintenance window of your configured window. Create the task flow using Oracle Workflow or the Task Flow windows, then view the window with the buttons in the People Management Configurator.

If you want to reposition or resize the buttons on the window, you need to add the button items to your template using the People Management Configurator, place them in the appropriate positions, set their size, and enter labels for them.

People Management Configurator User Interface

The People Management Configurator tool contains a graphical navigation tree and a set of properties. The navigation tree has been set up in a logical order so that if you follow the tree down from the top, that is the order in which you should complete your tasks. Expand the template name to see the information associated with the template.

You can see what your windows look like on the screen as you make edits to them. You can also preview the windows in your template to test out the fields and tabbing and see how they will appear to the user.

People Management Templates

The predefined People Management templates have been designed to help you create windows that match your business processes. These templates were created from the People Management window using the People Management Configurator. The predefined template windows are available on the Navigator; you can use these without making changes. Alternatively, you can make copies of the predefined templates and modify them to create your own windows, or you can create entirely new templates.

For details of the predefined templates, see *Predefined People Management Templates*, page 3-191

What Information Is Included In the Templates?

The predefined templates have been designed for generic business processes, such as hiring a person or creating a new applicant. For example, when you go through the hiring process, you typically have to open lots of windows to complete the task. With a template window, all the data can be put together and grouped into logical sections using the tabbed regions.

When an applicant is hired, assignment information from the application is automatically entered on the employee assignment.

Designing Your Own Templates

The People Management window contains all the personal and assignment information, such as `LAST_NAME` and `VACANCY`. You use the templates to control what the user can see by only including what you need.

See *Fields on the People Management Window*, page 3-205 for a complete list of all the fields available for you to use when creating People Management templates.

How Many Windows and Tabs Can I Design?

A template can consist of a Find window, Summary window, and Maintenance window. You can modify each of these windows to suit your requirements. You can design as many templates as you require, targeted at different tasks or user groups. For example, for users who only need to review information, you design a template that provides a Summary window. For users who need to update information, you can provide a Maintenance window too.

When you have created a new template, you add it to the Navigator so that your users can access the new windows. For each template, you can set up which window is displayed first. For example, you can specify that choosing People Maintenance from the

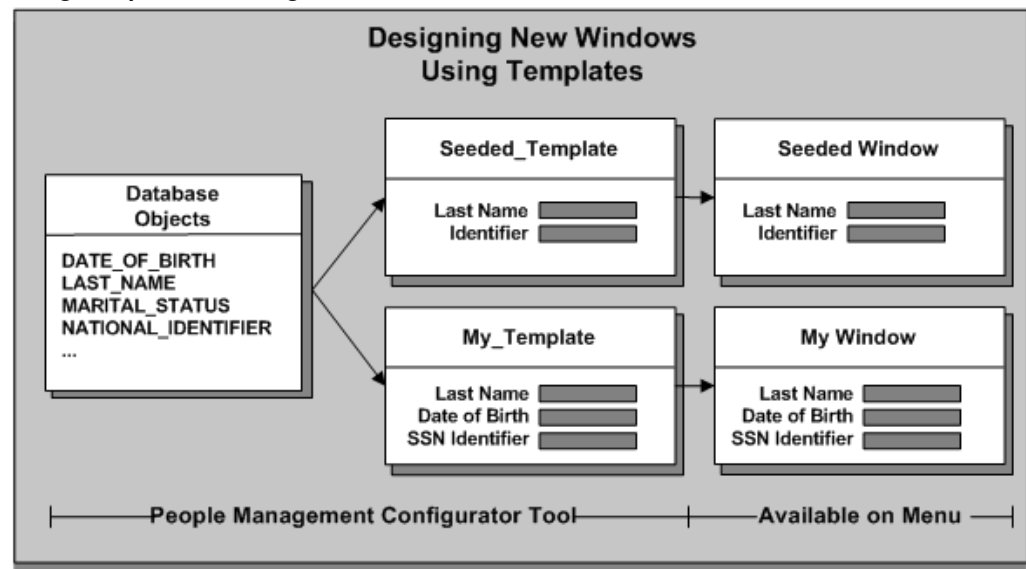
Navigator displays the Find window first to enable users to find a person. Then they can navigate to the Maintenance window by choosing the Show Details button.

The Find window can contain up to six tabs. One tab has been defined as the Advanced tab but you can use this for another purpose if you want.

The Summary window can contain up to ten tabs. One tab has been defined as the Checklist tab but you can use this for another purpose if you want.

The Maintenance window can contain up to ten tabs, including the Extra Information Types, and Special Information Types tabs. One tab has been defined as the Checklist tab but you can use this for another purpose if you want.

Using Templates to Design Process Based Windows



How Do I Control What Users Can Do With a Template?

Some restrictions are made using the People Management Configurator tool, and others using CustomForm. For example, you use the People Management Configurator to determine the fields, buttons, tabs, and windows available. You can also restrict a template to the Employee, Applicant or Contingent Worker system person types using the People Management Configurator.

You can use CustomForm to:

- Specify the user person types, special information types, and extra information types that users can view or enter
- Specify the actions that users can perform, and the notifications they can send
- Remove fields from the list available for searching on the Advanced Find tab
- Restrict the types of person record users can create using the template: new applicants, employees, contingent workers, applications, employee assignments, or contingent worker assignments.

Important: You must be careful to create consistent restrictions. For example, it would not be consistent to restrict a template to Applicants Only using the People Management Configurator, then add a

CustomForm restriction that only allows users to enter new employees or employee assignments.

Benefits of Using Template Windows

Templates provide the following advantages for your users:

- They can find information using the basic and advanced queries on the configurable Find window. You specify which fields appear in this window and in what order.
- They can save result sets to folders for repeated use in future work sessions.
- They can work more quickly if you use the templates to:
 - Hide information they do not need
 - Provide defaults where possible
 - Position fields in logical groups and on tabbed regions
- They can use the checklists to track the status of actions that you have defined as relevant to the template.

Using templates is only one part of making Oracle HRMS specific to your enterprise. You can also sequence windows together in task flows. You can define a Maintenance window to be the top window and provide buttons for navigating directly to other windows while the Maintenance window remains in the background.

People and Assignments in the Data Organizer

The Summary window of the people management templates includes the Data Organizer, which helps you find and organize information about people and assignments.

The Data Organizer can display people organized alphabetically by name, organization, or job. When you expand a person's node in the Data Organizer, you see a list of their employee, applicant, and contingent worker assignments. Assignments do not have names, so you can choose what information appears in this list to help users identify the assignment 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 in the Data Organizer. The same information appears in the Assignment field that you can display on the Maintenance window.

If you want to override the default, write a formula to return the text to be displayed. See: *Writing Formulas for Templates, Oracle HRMS FastFormula User Guide*

Defaulting Values in Template Fields

The templates enable you to default values in as many fields as you want. You can make data entry easier for users by defaulting items that frequently take the same value. Where the value is constant, you might set a default and then hide the field from users.

When an applicant is hired, assignment information from the application is automatically entered on the employee assignment.

Defaults from Other Windows

When you set up information for your implementation in Oracle HRMS windows, you can specify that values in some fields are automatically defaulted by the system when the user selects a value in another field. For example, you can set up default information for business groups in the Organization window, so that selecting a business group populates the fields for Location, Working Hours, Frequency, Start Time, and End Time. You can also specify default information in many fields for a position or vacancy in the Positions window and the Requisition and Vacancy window.

If you set defaults for these fields using People Management Configurator, they will be overridden by the automatic defaults set up in these windows.

Defaults in Dependent Fields

Some fields are dependent on other fields, so that when the user enters a value in the main field, they must always enter a value in the dependent field. For example, if the user enters a value for Notice Period, they must enter or select a value for Notice Period Units.

You cannot set default values in the dependent fields.

Information on the fields that are dependent on other fields is included in the list of Fields on the People Management Window, page 3-205

Predefined People Management Templates

Oracle supplies a number of predefined People Management templates. We recommend that you base any new window design on one of these templates.

Note: You can create an entirely new template but there are many issues to be aware of such as upgrading and setting up context-sensitive address styles. Instead, we recommend that you copy a predefined template for your localization and make any changes to that.

Templates are provided for specific localizations. There are also generic templates for you to use if none of the predefined localization-specific templates meet your requirements.

Hiring Applicants Template

This template enables you to create windows for entering an applicant, tracking the applicant up to the point of hire, and hiring the applicant. You can use the Hiring Applicants window for the complete hiring process. You can access both employees and applicants in this template. This enables you to hire applicants and to process internal applicants.

Enter Employees Template

This template enables you to create a Maintenance window for quickly entering details of employees, and their primary assignment. It is restricted to employees only. This window is designed for users who have lots of employees to enter who do not need any applicant history, for example, a one day casual hire.

You can enter basic personal details such as name, date of birth and address as well as assignment details such as job, grade, and salary. The Notify button enables you to send notifications about actions to other people.

Maintain Employees Template

Use this template to create windows for entering or maintaining full employee details. It is restricted to employees only. This is very similar to the tasks you would perform using the People window and associated windows.

Enter Contingent Workers Template

This template enables you to create a Maintenance window for quickly entering contingent worker details and their primary assignment. It is restricted to contingent workers only. This window is designed for users who have lots of contingent workers to enter.

You can enter basic personal details such as name, date of birth and address as well as assignment details such as job, supplier, and worker number. The Notify button enables you to send notifications about actions to other people.

Maintain Contingent Workers Template

Use this template to create windows for entering or maintaining contingent worker details. It is restricted to contingent workers only. This is very similar to the tasks you would perform using the People window and associated windows.

Visa Administration Template

This template enables you to create windows for entering information about foreign workers. You can record details about an employee's addresses, contacts and visa details.

HR Foundation Template

The HR Foundation template enables you enter and maintain contingent workers using the HR Foundation responsibility. The HR Foundation template is restricted to contingent workers only and is used for tasks very similar those tasks you would perform using the entering and maintaining contingent workers templates.

Find Window Configuration

There are two parts to a Find window, and you can choose the fields that appear on each:

- Find tabs where users enter their search criteria
- Find Folder where the results of the search are summarized in a one-row-per-record format

Find Folder

In the Find Folder, include fields that will enable users to uniquely identify the records they need. Typically these fields are Full Name, Employee or Applicant Number, National Identifier (such as Social Security Number) and Date of Birth.

Find Tab

Put the fields in which you expect users to search most frequently on the Details Find tab (the tab to display first). To provide fast search results, we recommend that some of the following fields are available for searching:

- Last Name
- Employee Number
- Applicant Number
- National Identifier
- Full Name

Fields that have lists of values also provide good search performance.

The predefined templates include the Effective Date field on the Details tab. You can use this field to change your effective date without using the calendar icon from the toolbar. The effective date determines the lists of values available on fields in the Find window and which records will be returned. If you are going to include this field on the Find window, it is best to place it at the top of the window. This encourages users to set their effective date first, and then select from the appropriate lists of values in the other Find fields. You can include up to six Find tabs.

Advanced Find Tab

You can provide an Advanced Find tab (as one of the six Find tabs) for more complex searches, such as matching ranges of values. To construct an advanced tab you need to include the following fields, where $n = 1$ to 5:

- Field n Name

This field enables you to select a field on which to perform an advanced search.

- Field n Condition Code

This field defines the operator for the search, for example, not equal to, less than, greater than.

- Field n Value

This field is the value you want to search on.

For example, you could set up the following query, find me all people whose hire date (field name) is less than (condition code) 1-Jan-1999 (value).

You can restrict the fields that users can select in the Field n Name fields using CustomForm. You can therefore remove the ability to search on sensitive or confidential fields.

Security Check Box on Find Window

There is a Security check box on the Find window that defines which people are included in a user's search. To find people from outside your Security profile, you must ensure that the Security check box is enabled and is unchecked. However, they will not be able to view full information for people outside their security profile, and they will not be able to update these records.

If you leave this box unchecked, you must be careful that no confidential information is included in the Results of the Find. We recommend that you always check this check box.

If you do not want users to be able to change the security profile set for the template then you should set the Security check box to the required setting and then hide it, thus preventing users from updating it.

Although the Security check box defines which people are included in a search, it does not define what can be saved from the Find window into the Data Organizer, as this is controlled by the user's security profile. This means that if you have the check box unchecked, your user may find that they cannot save some data that is returned in a query into a folder as it is outside their security access. The Data Organizer is also limited depending on the person type restrictions set up at template level.

If you delete the check box from the search criteria, the results will only display those people from within your Security profile.

SITs, EITs and Other Flexfields in Templates

Maintenance windows in your people management templates can include tabs for entering Special Information Types (SITs) and person and assignment Extra Information Types (EITs).

These tabs must contain a drop down list to enable the user to select the appropriate SIT or EIT to enter. This poplist controls the segments of the flexfield that display. In the People Management Configurator, you select the item Special Information Type List (Special Information), or Extra Information Type List (Extra Info), to enable this poplist.

You select which segments of the flexfield are displayed. Each segment is displayed as a folder form column. At run time, the window displays the appropriate columns with no gaps where segments are not displayed.

Note: You can control which SITs or EITs a user can select in the template by creating a CustomForm restriction that you associate with the template when you add it to a menu.

Segments Using Value Sets

Each segment item for a flexfield has two entries, one called *meaning* and one called *value*. The value item is always required as this is where the user would enter or select the information. The meaning item is only used where the user selects a value from a value set. If the value set uses a short meaning and a longer description, you can include the meaning item to display this longer description when the user selects a value.

For example, you may have a segment in a flexfield that records a country of residence. In the value field the user may select a country short code, USA, and in the meaning field the longer description, United States of America, would be displayed.

How Segment Properties Are Derived From Template and Flexfield Definitions

When a user selects an SIT or an EIT type from the list, the item properties for each segment depend on the settings defined for the template *and* the flexfield:

- Case Restriction, Default Value, Prompt Text, Width
If these properties are set in the template, these values are used. If not, the values set for the flexfield are used.
- Enabled, Insert Allowed, Update Allowed, Visible
If the value for these properties is set to Yes on the flexfield, and is set to Yes or blank on the template, then these properties are set to Yes. Otherwise these properties are set to No.
- Required

This property is set to Yes if it is set to Yes on *either* the template or the flexfield. Otherwise it is set to No.

Some of the properties rely on other properties being set to appropriate values for them to take effect. For example, if the Required, Insert Allowed, or Update Allowed value are set to Yes, this will only take effect if the item is enabled and visible.

Note: These rules apply to all flexfields, not just SITs and EITs.

Positioning Columns in the SIT Folder

We recommend that you place the items Date from (Special info) and Date to (Special info) first in the folder. Then place all of the Special Information Segment *n* Value items (where *n* is 1 to 30) onto the tab in consecutive order.

As it is a folder form, you must also include the record indicator for the multi row block. This item is called Current Record Indicator (special info). Make its width 0.1", and make it appear just before the first Date field.

Positioning Columns in the EIT Folder

We recommend that you place all Extra Information segments onto the tab in consecutive order. Assignment EITs are called Assignment Extra Information *n* Value items (where *n* is 1 to 30), and person EITs are called Person Extra Information *n* Value items (where *n* is 1 to 30).

The actual positioning of the EIT segments on the tab is not important as when the window is accessed by a user the first populated EIT segment is displayed flush against the current record indicator and all others are lined up against it.

As with the SIT folder, you must include the record indicator for the multi row block. This item is called Current record indicator (Extra info). Make its width 0.1", and make it appear just before the first EIT segment field.

Other Flexfields

You can include user-defined descriptive flexfields (DFs) and developer descriptive flexfields (DDFs) in both the Summary and Maintenance template windows. You can include individual flexfield segments directly in the template window in the same way that you would add normal fields (segment properties are the same as those described for EITs and SITs); alternatively you can include the whole flexfield in a flexfield popup window, by selecting the *Flexfield Name* Popup item. If you want to include multiple flexfields in your templates, you can include segments from some directly within the template, and add flexfield popup windows for others; however, you cannot include flexfield segments and a popup window for the same flexfield structure.

We recommend that you do not add too many flexfield segments directly to the template as this will impact performance. It is better to include whole flexfields as popup flexfield windows.

Context-Sensitive Fields In Templates

You can set up fields that are context-sensitive in your templates using the People Management Configurator tool. For example, you might want to display the Employee Number field when the selected person is an employee, and the Applicant Number field for an applicant.

You can also use this feature to display the appropriate segments of a flexfield. For example, you set the context to display the appropriate structure of the Personal Analysis Key Flexfield for the selected Special Information Type. You do not have to display the full structure defined in the flexfield. You can hide segments to save space on the template, or for security reasons.

You set up each context as a 'child' item under the main item in the People Management Configurator navigator. For example, if you want Post Code to display in three address style contexts, you define three context items under the Post Code item. If you hide the 'parent' items, there will be a blank area of the window when it opens. This area is populated by the context sensitive fields (such as address lines) when the user selects the appropriate context (such as an address style). The fields that are displayed, their position, size, defaults, and all other properties can vary with the context.

If one context is more common than the others, you can set that context as the default in the field where the context is chosen. Then there is no blank area when the window opens, because it contains the fields appropriate to this default context. For example, you might set your local address style as the default so that the appropriate address lines for local addresses are displayed by default.

Online Help Targets for Templates

When you are defining your template you can add your own help target to display a particular help topic in the online help. This will override the default context-sensitive help call of the *form.window* name.

If you enter a help target for the template this will override the *form* section of the default help target. The *window name* will still be appended to this target depending on from which window the user accesses help.

Note: If you define a new help target for your template **none** of the supplied online help for the template will work. You will have to update your help files to include your new help target.

The window names that can make up the People Management templates are:

- SUMMARY_WINDOW
- FIND_WINDOW
- MAINTAIN_WINDOW
- ACTION_WINDOW
- CREATE_WINDOW
- NOTIFY_WINDOW

For example, the default target that is generated when a user calls help from the Summary window of the Hiring Applicants template is PERWSQHM.SUMMARY_WINDOW. If you have defined a help target of "HIREAPP" for the Hire Applicants template, then when a user calls help from the Summary window the target that is generated is HIREAPP.SUMMARY_WINDOW.

Notification Messages Issued From Template Window

When users choose the Notify button on a template window, they can select a message and a person or role to send it to.

Predefined Messages

The following table shows predefined notification messages. You can create additional messages using Oracle Workflow or delete any that are not relevant to your enterprise.

Display Name	Internal Name
Change of employment for supervisor	SUPERVISOR_JOB_CHANGE
Change of Supervisor	CHANGE_SUPERVISOR
Employee Transfer	EMPLOYEE_TRANSFER
Employee Transfer - Notify Payroll	PAYROLL_INT_HIRE
New Contingent Worker Notification	NEW_CWK
New Hire Notification	NEW_STARTER
New Hire Notification (US)	US_NEW_STARTER
Notify Payroll with New Hire Details	PAYROLL_NEW_STARTER
Probation Period is close to expiry	PROBATION_PERIOD_EXP
Relocation Notification	RELOCATION_NOTIFICATION
Request Security Card	SECURITY
Employee Transfer (US)	US_EMPLOYEE_TRANSFER
Notify Payroll with New Hire Details (US)	US_PAYROLL_NEW_STARTER
Employee Transfer - Notify Payroll (US)	US_PAYROLL_INT_HIRE
Relocation Notification (US)	US_RELOCATION_NOTIFICATION
Visa Expiry Notification to Supervisor	GLB_SUP_VISA_EXP_WARN
Visa Expiry Notification to Employee	GLB_EMP_VISA_EXP_WARN
Visa Expiry Notification to Employee (US)	US_EMP_VISA_EXP_WARN
Visa Expiry Notification to Supervisor (US)	US_SUP_VISA_EXP_WARN

Message Tokens

Notification messages can include the following tokens:

- HIRE_DATE
- FULL_NAME

- PER_EFFECTIVE_START_DATE (Person Effective Start Date)
- TITLE
- FIRST_NAME
- LAST_NAME
- EMPLOYEE_NUMBER
- APPLICANT_NUMBER
- NATIONAL_IDENTIFIER
- ORGANIZATION
- GRADE
- JOB
- POSITION
- PAYROLL
- VACANCY
- SUPERVISOR
- ASG_EFFECTIVE_START_DATE (Assignment Effective Start Date)
- LOCATION
- SALARY
- SALARY_CURRENCY
- PAY_BASIS
- DATE_PROBATION_END
- NPW_NUMBER (Contingent Worker Number)
- START_DATE (Contingent Worker's Start Date)
- SUPPLIER_NAME
- SUPPLIER_REFERENCE
- FF1 - FF5

Creating Additional Tokens

If your messages require additional tokens, you can create a formula that returns up to five outputs that you can use as tokens (FF1 - FF5) in your message text. You create the formula using Oracle FastFormula.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*.

People Management Configurator Options

This section describes the configuration options you can use when designing your template. The options are shown in the order that they appear on the People Management Configurator tool.

Template Properties

Template Code

Displays the internal name for the template. This code in combination with the Legislation uniquely identifies the template. You use this name when adding the window to the user's menu.

Template Name

Specifies the descriptive name of the template.

Enabled

A template can be enabled or disabled. You can only choose the Run Template option from the Tools menu for a template that is enabled and linked to a menu. Disable a template when it is no longer in use.

Legislation

Specifies the legislation of the template. Leave the legislation option blank to create a generic template. The system automatically displays the appropriate legislative version of a template for a user, or the generic version if there is no legislative version that matches the legislation of the user's Business Group.

Description

You can provide a longer description of the template.

Help Target

You can add your own help target to display a particular help topic. This overrides the default context-sensitive help call of the *form.window* name.

Note: The target you enter here has the name of the window from which you have called help appended to it to form the complete target. For example, if you have defined a help target called HIREPER for your template and you call help from the Summary window, then the help target generated is HIREPER.SUMMARY_WINDOW.

Online Help Targets for Templates, page 3-196

Further Information

Use this Further Template Properties flexfield to enter additional configuration information for the template. For example, for the People Management templates this flexfield enables you to specify which window is displayed first and which person types are allowed.

[]

Additional Template Details descriptive flexfield. You can configure this to include additional information.

Window Properties

Window Name

Specifies the name of the selected window. There are three windows available: Summary, Find, and Maintenance

Title

Specifies the title of the window. This name is displayed at the top left of the window.

Height

Sets the height of the window in inches.

Width

Sets the width of the window in inches.

X Position and Y Position

Sets the position of the window using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the window around.

Further Information

Further Window Properties Developer Descriptive flexfield.

Canvas Properties

Canvas Name

Specifies the name of the selected canvas. This is the region of the window where fields and other items appear. The canvases available depend on the window you are creating:

- **Background Canvases**
The Maintain, Summary, and Find canvases fill in the background of the window. You cannot amend the properties of these canvases.
- **Tab Canvases**
The Maintain Tabs, Summary Tabs, and Find Tabs canvases define the area of the window in which you can define tabs.
- **Find Results Canvas**
The Find Results canvas defines the area of the window in which you can define the Find Results region.

Visible

Set this to Yes if you want the canvas to be displayed to the user.

Height

Sets the height of the canvas in inches.

Width

Sets the width of the canvas in inches.

X Position and Y Position

Sets the position of the canvas using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the canvas around.

Further Information

Developer Descriptive flexfield.

Tab Page Properties**Tab Page Name**

Displays the name of the tab. The tabs available to you depend on the window you are editing:

- Find - The find window has six tabs you can set up for any use.
- Maintain - The Maintain window has ten tabs available. Three tabs have been set up to be used specifically for Extra Information Types (EIT), Special Information Types (SIT), and the checklist.
- Summary - The Summary window has ten tabs available. One tab has been set up to be used specifically for the checklist.

Visible

Set this to Yes if you want the tab to be displayed to the user.

Label

The label appears on the tab and describes the content of the tab.

You can define an access key (or keyboard shortcut) by preceding the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Personal Details tab, enter the label &Personal Details.

Do not use the letters A, E, F, G, H, Q, S, or W, as they are used on the Oracle Applications menu. There is no validation to prevent the same letter being used more than once in the same window.

Navigation Direction

Sets the tabbing order for the items in the tab. This can be left to right, or top to bottom.

Further Information

Developer Descriptive flexfield.

Item Properties

Item Name

The item name is the name of the data item or field, such as LAST_NAME, you have currently selected in the People Management Configurator Items branch. Items also include buttons, such as the Actions or Notify button, and flexfield popup windows. If you are working with a predefined template, only the fields used in that template are displayed on the People Management Configurator Items branch. You can add other fields to your template from the window.

See: Adding and Removing Fields on a Template, page 3-235.

Window Name

Displays the window name on which the field is used. You cannot change this property. Each field has an associated window. There are three windows available: Summary, Find, and Maintenance

Tab Page Name

Displays the name of the tab or tabs in the window on which the field is positioned. You can choose a tab by clicking the button next to this field to see the available tab pages you can use.

Visible

Set this to Yes if you want the field to be displayed to the user. If it is set to No, the user cannot see the field but the field and its value are still in use. For example, the Secure check box on the Find window is not visible but the box has been checked. The user cannot see the check box on the window but the security restriction still applies.

Height

Sets the height of the field in inches.

Width

Sets the width of the field in inches.

X Position and Y Position

Sets the position of the field using co-ordinates. X sets the horizontal position and y sets the vertical position. Alternatively, you can use the arrow keys to move the field around.

Enabled

Specifies whether the user can put their cursor into this field. If it is set to No, the user can see the field but cannot do anything to it.

Required

Set this to Yes if you want to make the field mandatory.

Query Allowed

Specifies whether the user can run a query in this field.

Note: This property is ignored in the People Management templates. You can only run queries using the Find window.

Insert Allowed

Specifies whether the user can insert new data in this field. If this is set to No for a field or button then it appears greyed out in the window.

Note: If you set this option to No for a check box then the check box still appears in white on the window. To grey out a check box you must set the Enabled option to No.

Update Allowed

Specifies whether the user can enter information in the field and save it to the database. If this is set to No, the user can enter information but cannot save it.

Note: All fields included on a Summary window are greyed out, irrespective of the settings in the Insert Allowed and Update Allowed fields.

Prompt Text

Defines what text is displayed with the field. It also defines the text displayed for a group of check boxes. You enter text labels for individual check boxes using the Label property (see below).

Prompt Display Style

Specifies where a prompt is displayed for multi-row columns. "First Record" displays a prompt next to the first row. "All Records" displays a prompt next to each row. "Hidden" hides all prompts.

Prompt Text Alignment

Specifies the alignment of the prompt text as Center, Left, Right, End, or Start within the prompt box. Generally has no visible effect.

Prompt Edge

Specifies which edge of the field the prompt is attached to, either Start, End, Top, or Bottom.

Prompt Edge Alignment

Specifies how the prompt is aligned along the selected field edge, either Start, End or Center.

Prompt Edge Offset

Specifies the distance between the field and its prompt, measured in inches.

Prompt Alignment Offset

Use this property to adjust the prompt edge alignment. For example, if the Prompt Edge is Top, the Prompt Edge Alignment is Center and the Prompt Alignment Offset is 0.1, the prompt is centered 0.1 inches from the center of the top edge of the field.

Label

This only applies to buttons or check box items. The label describes the button or individual check box.

You can define an access key (or keyboard shortcut) by preceding the appropriate letter in the label with an ampersand (&). For example, to use ALT+P (in the Microsoft Windows environment) as the access key for the Picture window, enter the label &Picture.

Do not use the letters A, E, F, G, H, Q, S, or W, as they are used on the Oracle Applications menu. There is no validation to prevent the same letter being used more than once in the same window.

Tooltip Text

You can enter text here that displays when the user has the mouse pointer over the field. Use this to provide additional quick help.

Previous Item

Specifies which field is tabbed to next if you tab backwards. This overrides the default tabbing order.

Next Item

Specifies which field is tabbed to next. This overrides the default tabbing order.

Default Value

You can set the default value for the field here. Setting defaults can help save time, provide better control, and reduce errors for the user.

Format Mask

You can apply a format style to number and date type fields so that the format is correct for your users.

Validation Formula

You can set up additional validation using formulas. For example, if you need to validate that an entry has been entered correctly, you can create a validation formula to check the format. Up to five inputs can be passed to the formula but only one message can be returned.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*

Validation Formula Parameters 1-5

Enter the parameters you want to pass to the formula specified in the Validation Formula field.

Information Formula

You can set up additional information for fields using a formula. For example, on the Job field, the user can right click and choose More Information to see related information such as supervisor. Up to five inputs can be passed to the formula but only three outputs can be returned.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*

Information Prompt

Specifies the prompt displayed on the right mouse menu which the user selects to view the information you have defined in the Information Formula.

Information Formula Parameters (1-5)

Enter the parameters you want to pass to the formula specified in the Information Formula field.

Alignment

Defines the alignment of text within the item (left, center, or right).

Case Restriction

Defines what case the text is defaulted to. For example, you can set it to upper case so that all the text entered in the field is upper case.

Bevel

Specifies the appearance of the field border, either RAISED, LOWERED, INSET, OUTSET, or NONE.

Further Information

Opens the Further Item Properties developer descriptive flexfield, where you can enter additional configuration options. For example, for the People Management templates, you can select whether DateTrack History is enabled for datetracked fields.

Fields on the People Management Window

The following table lists all the available fields on the People Management window. Not all of these fields are available on the predefined People Management templates. You can choose which of these fields are displayed on your users' windows by making your own copies of the People Management templates and adding or removing fields.

See Adding and Removing Fields on a Template, page 3-235

Item Title	Windows	Additional Information
Accounting KeyFlex Popup	Maintain	Popup window containing all segments for the Default Expense Account key flexfield
Action	Maintain Summary	Button
Address Attribute 1-20	Maintain Summary	Segments from the Additional Address Details descriptive flexfield
Address Attribute Category	Maintain Summary	Context for the Additional Address Details descriptive flexfield

Item Title	Windows	Additional Information
Address Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Address Details descriptive flexfield
Address Date From	Maintain Summary	Field
Address Date To	Maintain Summary	Field
Address Information 13-20	Maintain Summary	Segments from the Address developer flexfields that may have been defined by localization teams
Address Information Popup	Maintain Summary	Popup window containing all segments for the Address developer flexfields
Address Line 1-3	Maintain Summary	Field
Address Type	Maintain Summary	Field
Adjusted Service Date	Maintain Summary	Field
Age	Maintain Summary	Field
Alternate First Name	Maintain	Filed aviable in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Alternate Family Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Annuities	Maintain	Field Available in the GOSI Details tabbed region. This field is available to Saudi users only

Item Title	Windows	Additional Information
Annuities Join Date	Maintain	Field Available in the GOSI Details tabbed region. This field is available to Saudi users only
Applicant Number	Find Results Find Maintain Summary	Field
Application Attribute 1-20	Maintain Summary	Segments from the Additional Application Details descriptive flexfield
Application Attribute Category	Maintain Summary	Context for the Additional Application Details descriptive flexfield
Application Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Application Details descriptive flexfield
Application Date End	Summary	Field
Application Date Received	Maintain Summary	Field
Approved	Maintain Summary	Field
Assignment Attribute 1-30	Maintain Summary	Segments from the Additional Assignment Details descriptive flexfield
Assignment Attribute Category	Maintain Summary	Context for the Additional Assignment Details descriptive flexfield
Assignment Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Assignment Details descriptive flexfield
Assignment Category	Find Results Find Maintain Summary	Employment or Assignment Category

Item Title	Windows	Additional Information
Assignment Effective End Date	Find Results Maintain Summary	Field
Assignment Effective Start Date	Find Results Maintain Summary	Field
Assignment Extra Information 1-30	Maintain	Assignment extra information types
Assignment Extra Information Category	Maintain	Context for the Assignment extra information types
Assignment List	Maintain	Drop-down list displaying person's assignments
Assignment Number	Find Results Maintain Summary	Field
Assignment Rate	Maintain	Assignment rate for contingent workers
Assignment Rate Basis	Maintain	Assignment rate basis for contingent workers
Assignment Rate Currency	Maintain	Assignment rate currency for contingent workers
Assignment Rate Value	Maintain	Assignment rate monetary value for contingent workers
Assignment Sequence	Find Results Maintain Summary	Field
Assignment Status Type	Find Results Find Maintain Summary	Field
Assignment Title	Summary	Field
Assignment Type	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Available For Transfer	Maintain Summary	Field
Background Check Date	Maintain	Field
Background Check Status	Find Results Maintain Summary	Field
Background Date Check	Find Results Summary	Field
Bargaining Unit Code	Find Results Find Maintain Summary	Field
Benefit Group	Find Results Find Maintain Summary	Field
Benefit Medical Plan Number	Maintain	Field
Birth Name	Maintain	Field. Hungarian users only
Billing Title	Maintain	Field
Blood Type	Find Results Maintain Summary	Field
Button 1-5	Maintain	Task flow buttons
Cancel	Find	Button
Change Date	Maintain Summary	Assignment change date
Change Reason	Find Results Maintain Summary	Assignment change reason
Checklist 1-10 Date Done	Maintain Summary	Field
Checklist 1-10 Date Due	Maintain Summary	Field

Item Title	Windows	Additional Information
Checklist 1-10 Item Code	Maintain Summary	Field
Checklist 1-10 Notes	Maintain Summary	Field
Checklist 1-10 Status	Maintain Summary	Field
Civil Identity Number	Maintain	Field This field is available to Saudi users only
Civil Identifier	Maintain	Field Available in the Employee Details tabbed region. This field is available to Kuwaiti users only.
Clear	Find	Button
Collective Agreement	Maintain Summary	Field
Collectively Agreed Grades Id Flex Num	Maintain Summary	Field
Collectively Agreed Grades Name	Maintain Summary	Field
Command Color	Maintain	Field. This is available on the Military tab. Hungarian users only
Command Type	Maintain	Field. This is available on the Military tab. Hungarian users only
Command Number	Maintain	Field. This is available on the Military tab. Hungarian users only
Contingent Worker Number	Find Results Find Maintain Summary	Field
Contribution Group	Maintain	Field. Spanish users only.

Item Title	Windows	Additional Information
Contract	Find Results Maintain Summary	Field
Coordinated Benefits Medical Plan Number	Find Results Summary	Field
Coordinated Benefits No Coverage	Find Results Summary	Field
Correspondence Language	Find Results Maintain Summary	Field
Country	Maintain Summary	Field
Country 1-3	Maintain Summary	Field
Country of Birth	Maintain Summary	Field
Currency Code	Maintain Summary	Field
Current Employer	Maintain Summary	Field
Current Record Indicator	Find Results Maintain	This indicator must be included in any multi-block records. It shows the currently selected record. There are separate versions of this item on the Maintain window for special information types and extra information types.
Custom Date Text Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details.

Item Title	Windows	Additional Information
Custom Number Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Character Text Item 1-10	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Checkbox Item 1-3	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom List Item 1-3	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Custom Item with List of Values 1-5	Maintain	These fields do not correspond to the database column. They are used in a custom library solution. Please refer to the "Additional Configuration Options For People Management" for more details
Date Employee Data Verified	Find Results Maintain Summary	Field
Date From	Maintain	Special information
Date Of Birth	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Date Of Death	Find Results Maintain Summary	Field
Date Of Receipt Of Death Certificate	Maintain	Field
Date Probation End	Find Results Maintain Summary	Field
Date To	Maintain	Special information
Datetrack Correction	Maintain	Datetrack radio button
Datetrack Update	Maintain	Datetrack radio button
Default Code Combination Identifier	Find Results	Internal identifier for the assignment's default expense account
Dependant Adoption Date	Find Results Maintain Summary	Field
Dependant Voluntary Service	Find Results Maintain Summary	Field
Deployment Factor Attribute 1-20	MaintainSummary	Segments from the Additional Deployment Factor Details descriptive flexfield (Work Choices)
Deployment Factor Attribute Category	Maintain Summary	Context for the Additional Deployment Factor Details descriptive flexfield (Work Choices)
Deployment Factors Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Deployment Factor Details descriptive flexfield (Work Choices)
Description of Expense Account	Maintain	Description associated with Accounting KeyFlex popup window
Dpf Fte Capacity	Maintain Summary	Deployment factor FTE capacity

Item Title	Windows	Additional Information
Dpf Work Duration	Maintain Summary	Deployment factor work duration
Dpf Work Hours	Maintain Summary	Deployment factor work hours
Dpf Work Schedule	Maintain Summary	Deployment factor work schedule
Duplicate Check	Maintain Maintain Tabs	Button. This can be placed on the main window or the tabs in the Maintain window. If you include this button you must ensure that you have set up a Find window in your template.
Earliest Available Date	Maintain Summary	Field
Education Establishment 1-4 Attended End Date	Summary	Schools information
Education Establishment 1-4 Attended Start Date	Summary	Schools information
Education Establishment 1-4 Full Time	Summary	Schools information
Education Establishment 1-4 Name	Summary	Schools information
Effective Date	Find Maintain	There are separate versions of this element for the Find window and the timeline on the Maintain window
Email Address	Find Results Find Maintain Summary	Field
Employee Category	Maintain Summary	Field
Employer	Maintain	Field Available in the GOSI tabbed region This field is available to Saudi users only

Item Title	Windows	Additional Information
Employee Number	Find Results Find Maintain Summary	Field
Establishment	Find Maintain Summary	Field
Expense Check Send Address	Find Results Maintain Summary	Field
Extra Information Type List	Maintain	Displays a drop-down list of extra information types.
Family Name	Maintain	Field Available in the Alternate Names and in the Employee Details tabbed region This field is available to Saudi and Kuwaiti users only
Father Name	Maintain	Field Available in the Alternate Names and in the Employee Details tabbed region This field is available to Saudi and Kuwaiti users only
Father's Alternate Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Field 1-5 Condition Code	Find	Advanced search items
Field 1-5 Name	Find	Advanced search items
Field 1-5 Value	Find	Advanced search items
Find	Find	Button
First Name	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Frequency	Find Results Maintain Summary	Dependent field. Used with Normal Hours.
Full Name	Find Results Find Maintain Summary	Field
Full Name Title	Summary	Field
Full Time Equivalent Capacity	Find Results Maintain Summary	Field
Gender	Find Results Find Maintain Summary	Field
Go	Maintain	Button used on timeline to show details as of the effective date entered
GOSI Number	Maintain	Field Available in the GOSI Details region tabbed region This field is available to Saudi users only
Grade Ladder	Find Results Find Maintain Summary	Field
Grade	Find Results Find Maintain Summary	Field
Grandfather Name	Maintain	Field Available in the Alternate Names and Employee Details tabbed region This field is available to Saudi and Kuwaiti users only

Item Title	Windows	Additional Information
Grandfather's Alternate Name	Maintain	Field Available in the Additional Name Details tabbed region. This field is available to Kuwaiti users only.
Governorate	Maintain	Field Available in the Employee Details tabbed region. This field is available to Kuwaiti users only.
Group	Maintain	Field. This is available on the Civil tab. Hungarian users only.
Hazards	Maintain	Field Available in the GOSI Details tabbed region. Available in the GOSI Details tabbed region This field is available to Saudi users only
Hazards Join Date	Maintain	Field Available in the GOSI Details tabbed region This field is available to Saudi users only
Hire Date	Maintain Summary	Start Date for Employee
Hold Applicant Date Until	Find Results Maintain Summary	Field
Honors	Find Results Maintain Summary	Field
Hourly Salaried	Find Results Maintain Summary	Field
Identifier Type	Maintain	Field. Spanish users only.
Identifier Value	Maintain	Field. Spanish users only.

Item Title	Windows	Additional Information
Internal Address Line	Find Results Maintain Summary	Field
Internal Location	Find Results Maintain Summary	Field
Job	Find Results Find Maintain Summary	Field
Known As	Find Results Maintain Summary	Field
Labour Union Member	Find Results Maintain Summary	Field
Last Medical Test By	Find Results Maintain Summary	Field
Last Medical Test Date	Find Results Maintain Summary	Field
Last Name	Find Results Find Maintain Summary	Field
1st Last Name	Maintain	Field. Spanish users only.
2nd Last Name	Maintain	Field. Spanish users only.
Load Picture	Maintain	Button that enables you to load a digitized picture of the person
Local Department	Maintain	Field. This is available on the Civil tab. Hungarian users only.

Item Title	Windows	Additional Information
Local Sub Department	Maintain	Field. This is available on the Civil tab. Hungarian users only.
Location	Find Results Find Maintain Summary	Field
Legal Employer	Maintain	Fields Available in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Mailstop	Find Results Maintain Summary	Field
Manager	Find Results Maintain Summary	Field
Mandate Code	Maintain	Field. This is available on the Military tab. Hungarian users only.
Mandate Date	Maintain	Field. This is available on the Military tab. Hungarian users only.
Marital Status	Find Results Maintain Summary	Field
Middle Names	Find Results Find Maintain Summary	Field
Mother's Maiden Name	Maintain	Field. Hungarian users only
Multiple Components	Maintain	Field
National Identifier	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
NIF Number	Maintain	Field. Spanish users only
Nationality	Find Results Find Maintain Summary	Field
No Benefit Coverage	Maintain	Field
Normal Hours	Find Results Maintain Summary	Field
Notice Period Length	Maintain Summary	Field
Notice Period Units	Maintain Summary	Dependent field. Used with Notice Period Length.
Notify	Maintain Summary	Field
Office Number	Find Results Maintain Summary	Field
On Military Service	Find Results Maintain Summary	Field
Only Current Location	Maintain Summary	Field
Organization	Find Results Find Maintain Summary	Field
Organization	Maintain	Field. This is available on the Civil tab. Hungarian users only
Original Date Of Hire	Maintain Summary	Field

Item Title	Windows	Additional Information
Pay Basis	Find Results Maintain Summary	Salary frequency
Pay Proposal Attribute 1-20	Maintain Summary	Segments from the Additional Salary Administration Details descriptive flexfield
Pay Proposal Attribute Category	Maintain Summary	Context for the Additional Salary Administration Details descriptive flexfield
Pay Proposal Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Salary Administration Details descriptive flexfield
Payroll	Find Results Find Maintain Summary	Field
People Group	Find	Field
People Group KeyFlex Popup	Find Results Maintain Summary	Popup window containing all segments for the People Group key flexfield
People Group Segment 1-30	Find Results Maintain Summary	Segments from the People Group key flexfield
Performance Review Period	Find Results Maintain Summary	Field
Performance Review Period Frequency	Find Results Maintain Summary	Dependent field. Used with Performance Review Period.
Person Attribute 1-30	Maintain Summary	Segments from the Additional Person Details descriptive flexfield
Person Attribute Category	Maintain Summary	Context for the Additional Person Details descriptive flexfield

Item Title	Windows	Additional Information
Person Attributes Popup	Maintain Summary	Popup window containing all segments for the Additional Person Details descriptive flexfield
Person Effective End Date	Find Results Maintain Summary	Field
Person Effective Start Date	Find Results Maintain Summary	Field
Person Extra Information 1-30	Maintain	Person extra information type
Person Extra Information Category	Maintain	Context for the Person extra information type
Person Information 1-30	Find Results Maintain Summary	Person developer descriptive flexfield. This will only contain records if they have been set up for your legislation.
Person Information Category	Find Results Maintain Summary	Context for the Person developer descriptive flexfield.
Person Information Popup	Find Results Maintain Summary	Popup window containing all segments for the Person developer descriptive flexfield.
Person Referred By	Find Results Maintain Summary	Field
Person Type	Find Results Find Maintain Summary	Field
Personal Identity Number	Maintain	Field. This is available on the Employment tab. Hungarian users only
Pensioner Registration Number	Maintain	Field. This is available on the Employment tab. Hungarian users only

Item Title	Windows	Additional Information
Phone Home Date From	Maintain Summary	Field
Phone Home Date To	Maintain Summary	Field
Phone Home Fax Date From	Maintain Summary	Field
Phone Home Fax Date To	Maintain Summary	Field
Phone Home Fax Number	Maintain Summary	Field
Phone Home Number	Maintain Summary	Field
Phone Mobile Date From	Maintain Summary	Field
Phone Mobile Date To	Maintain Summary	Field
Phone Mobile Number	Maintain Summary	Field
Phone Work Date From	Maintain Summary	Field
Phone Work Date To	Maintain Summary	Field
Phone Work Fax Date From	Maintain Summary	Field
Phone Work Fax Date To	Maintain Summary	Field
Phone Work Fax Number	Maintain Summary	Field
Phone Work Number	Maintain Summary	Field
Picture	Maintain Summary	Field

Item Title	Windows	Additional Information
Placement Start Date	Maintain Summary	Start date for a contingent worker period of placement
Place of Birth	Maintain	Field. Hungarian users only.
Position	Find Results Find Maintain Summary	Field
Position	Maintain	Field. This is available on the Civil tab. Hungarian users only
Postal Code	Maintain Summary	Field
Pre Name Adjunct	Find Results Maintain Summary	Field
Previous Last Name	Find Results Maintain Summary	Field
Primary Address	Maintain	Field
Primary Assignment	Find Results Maintain Summary	This check box should always be set to display only when included in a template. When a user wants to change a secondary assignment to a primary they must use the Make Primary Assignment action.
Probation Period	Find Results Maintain Summary	Field
Probation Unit	Find Results Maintain Summary	Dependent field. Used with Probation Period.
Professional Category	Maintain	Field. Spanish users only.

Item Title	Windows	Additional Information
Projected Hire Date	Find Results Find Maintain Summary	Field
Projected Placement End Date	Maintain Summary	Projected end date for a contingent worker period of placement
Project Title	Find Results Find Maintain Summary	Field
Proposed Salary	Maintain Summary	Field
Rank	Maintain	Field. This is available on the Military tab. Hungarian users only
Reason Not Completed	Maintain	Field. This is available on the Military tab. Hungarian users only
Receipt Of Death Certificate Date	Find Results Summary	Field
Recruiter	Find Results Maintain Summary	Field
Recruitment Activity	Find Results Find Maintain Summary	Field
Region 1-3	Maintain Summary	Address regions
Region of Birth	Maintain Summary	Field
Registered Disabled	Find Results Find Maintain Summary	Field

Item Title	Windows	Additional Information
Rehire Reason	Maintain Summary	Field
Rehire Recommendation	Find Results Maintain Summary	Field
Religion	Maintain	Field This field is available to Saudi users only
Relocate Domestically	Maintain Summary	Field
Relocate Internationally	Maintain Summary	Field
Relocation Preference	Maintain Summary	Field
Requisition	Find Results Find Maintain Summary	Field
Resume Exists	Find Results Maintain Summary	Field
Resume Last Updated	Find Results Maintain Summary	Field
Salary Basis	Find Results Find Maintain Summary	Field
Salary Change Reason	Maintain Summary	Field
Salary Review Period	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Salary Review Period Frequency	Find Results Maintain Summary	Dependent field. Used with Salary Review Period.
Save As	Find	Button
Second Passport Exists	Find Results Maintain Summary	Field
Secure	Find	Check box
Set of Books	Maintain	Field
Section	Maintain	Field. This is available on the Employment tab. Spanish users only.
Show Details	Find Summary	Button
Soft Coded KeyFlex Popup	Find Results Maintain Summary	Popup window containing all segments for the soft coded legislation key flexfield.
Soft Coded Segment 1-30	Find Results Maintain Summary	The soft coded legislation key flexfield holds legislation specific information at the assignment level. The legislation of your Business Group determines which flexfield structure you see.
Social Security Code	Maintain	Field
Source Organization	Find Results Maintain Summary	Field
Social Security Start Date	Maintain	Field. Hungarian users only
Social Security End Date	Maintain	Field. Hungarian users only
Service Completed	Maintain	Field. This is available on the Military tab. Hungarian users only
Service Start Date	Maintain	Field. This is available on the Military tab. Hungarian users only

Item Title	Windows	Additional Information
Service End Date	Maintain	Field. This is available on the Military tab. Hungarian users only
Source Type	Find Results Maintain Summary	Field
Social Security Number	Maintain	Fields available in the Employment Details tabbed region. This field is available to Kuwaiti users only.
Special Ceiling Point	Find Results Maintain Summary	Dependent field. Used with Special Ceiling Step.
Special Ceiling Step	Find Results Maintain Summary	Field
Special Information Segment 1-30	Maintain	Field
Special Information Type List	Maintain	Displays a drop-down list of special information types.
Special Title	Maintain	Field
Start Date	Find Results Find Maintain Summary	Field
Student Status	Find Results Maintain Summary	Field
Style	Maintain Summary	Address style
Sub Group		
Successful	Maintain Summary	Flag indicating whether an application was successful

Item Title	Windows	Additional Information
Suffix	Find Results Maintain Summary	Field
Supervisor	Find Results Find Maintain Summary	Field
Supplier ID For Assignment	Find Results Find Maintain Summary	Supplier ID information for a contingent worker
Supplier ID For Worker	Find Results Find Maintain Summary	Supplier ID information for a contingent worker
Supplier Name	Find Results Find Maintain Summary	Supplier name for contingent worker
System Person Type	Find Results Maintain	Field
System Status	Find Results Summary	Field
Tax Effective End Date	Maintain Summary	Field
Tax Effective Start Date	Maintain Summary	Field
Tax Field 1-150	Maintain Summary	Empty items to enable localization teams to configure legislation specific information, such as tax information.
Tax Identification Number	Maintain	Field. This is available on the Employment tab. Hungarian users only
Telephone Number 1-3	Maintain Summary	Field

Item Title	Windows	Additional Information
Termination Reason	Maintain Summary	Field
Time Normal Finish	Find Results Maintain Summary	Field
Time Normal Start	Find Results Maintain Summary	Field
Timeline Field	Maintain	Drop-down list that enables you to select what data is shown in the timeline
Timeline First	Maintain	Button
Timeline Last	Maintain	Button
Timeline Next	Maintain	Button
Timeline Previous	Maintain	Button
Title	Find Results Find Maintain Summary	Field
Town of Birth	Maintain Summary	Field
Town Or City	Maintain Summary	Field
Travel Required	Maintain Summary	Field
Unacceptable Country 1-3	Maintain Summary	Countries in which the person does not want to work
Under 18 Approved	Maintain	Field. Spanish users only
Uses Tobacco	Find Results Maintain Summary	Field

Item Title	Windows	Additional Information
Vacancy	Find Results	Field
	Find	
	Maintain	
	Summary	
Visit Internationally	Maintain	Field
	Summary	
Work Center	Maintain	Field. Spanish users only
Work Any Country	Maintain	Field
	Summary	
Work Any Location	Maintain	Field
	Summary	
Work Schedule	Find Results	Field
	Maintain	
	Summary	

Using the People Management Configurator

Use the People Management Configurator to create your own versions of the predefined People Management templates and design windows that match your business processes.

Note: You can also use CustomForm to configure certain windows, including the People Management template windows, by setting access restrictions.

See: Using CustomForm, page 3-246

To configure a template using the People Management Configurator:

1. Write any formulas you require for the template. You can write formulas to:
 - Change the name used to identify assignments.
 - Validate user entries in a field.
 - Provide more information on a field, which the user can access from the right mouse menu when they right-click on the field.
 - Create additional tokens for notification messages.

See: Writing Formulas for Templates, *Oracle HRMS FastFormula User Guide*.

2. Open and make a copy of a predefined template using the People Management Configurator, or import an existing template.

See: Opening and Copying a Template, page 3-232

See: Importing a Template, page 3-233

3. Modify the template to your requirements. You can perform as many of the following tasks as you require to complete your template.
 - See: Editing a Template, page 3-233
 - See: Adding and Removing Fields on a Template, page 3-235
 - See Adding Flexfields to a Template, page 3-236
 - See: Defining Checklists, page 3-237
 - See: Setting Defaults for Fields in Templates, page 3-238
 - See: Setting Up Context-Sensitive Fields in Templates, page 3-238
 - See: Setting Up DateTrack History on Fields in Templates, page 3-239
 - See: Setting Up More Information on Fields in Templates, page 3-240
4. Review the predefined notifications and create any required new ones using Oracle Workflow.
 - See: Notification Messages Issued from Template Forms, page 3-197
5. If appropriate, use CustomForm to restrict the information that appears in the template window, and the actions that users can perform.
 - See: Configure a Window With CustomForm, page 3-247
6. Create a form function for the new window, and add the window to a menu or task flow.
 - See: Adding a People Management Window to a Menu or Task Flow, page 3-240
7. Preview the form in the People Management Configurator to check properties such as field tabbing sequence and defaults. You can also check whether you are happy with the default position of task flow buttons. If not, you can reposition them in the People Management Configurator.

Opening and Copying a Template

You can use the predefined People Management templates as a basis for designing your own windows. You cannot edit the predefined templates directly, but you can make your own copy of any template and edit the copy. You can then always return to the original template if necessary.

Note: We also recommend that you set up templates in a test area. This avoids any security infringements when you run a template to view the windows you are designing. If the Security check box on the Find window is not selected, you can view summary information in the search results about all the people who meet your search criteria. This may include people outside your security profile.

To open and copy a template:

1. In the Navigator, open the People Management Configurator.
2. In the Find Templates window, select the template you want to copy.
3. Choose the Copy button.

4. In the Copy Template window, enter the details for your new template in the Copy To section:
 - Enter a template code and, optionally, a legislation. These must form a unique combination, but you can create several legislative variations using one template code.

You use the template code when you add the template window to a menu.

- Enter a descriptive name for the template
 - Choose Yes or No to enable or disable the template. While designing a window, you can choose No so that users cannot display the window.
5. Choose OK. In the Decision window that appears next, choose Yes.

The Designer (People Management) window is displayed along with a representation of how the template window will appear to the user.

To make changes to the template, see *Editing a Template*, page 3-233.

Importing a Template

You can import a template from another database provided that it is for the same legislation as your Business Group. For example, you should not import a UK template for a US Business Group.

You might want to import a template from a test database to your production environment. You can also use this procedure to make backups of templates.

This procedure involves downloading the template to a data file then uploading to your target database.

To import a template:

1. Run the Forms Configurator - Download Template process. You do this in the Submit Requests window for a Super HRMS Manager responsibility.
2. In the Parameters window, enter a filename and full directory path for the data file. The template will be saved to this data file. You will use this data file to import the template later.
3. Select the name of the template you want to download and choose OK.
4. Go to the database where you want to upload and use the template.
5. Run the Forms Configurator - Upload Template process.
6. In the Parameters window, enter the name and path of the data file you created when you downloaded the template.

The template is now available for you to add to a menu or modify using the People Management Configurator.

Editing a Template

You can edit a copy of a predefined template to design the layout and content of a People Management window. Use the People Management Configurator tool.

Note: You cannot edit the predefined templates directly. To make a copy of a predefined template to edit, see *Opening and Copying a Template*, page 3-232

To see a full list of the properties you can set for templates, windows, canvases, tab pages, and items, see: *People Management Configurator Options*, page 3-198.

To edit a template:

1. In the Find Template window, select the template you want to edit and choose Edit.

The Designer window of the People Management Configurator tool is displayed, showing a navigation tree for the items on the template. When you select something in the navigator, its properties are shown in the bottom half of the window. A representation of each window in the template form as it will appear to the user is also displayed behind the Designer.

2. Review the template properties and edit as required. Click in the Further Information field (a predefined descriptive flexfield) if you want to:
 - Restrict the template to handling applicants, employees or contingent workers only.
 - Specify which windows (Summary, Maintenance and Find) are included in the template, and which one displays first.
3. Click the + symbol next to the template name (top node in the navigator) to expand the node and display Windows and Items.
4. Expand **Windows** to display details of the windows in the template.
5. Expand each window to display the canvases and tab pages it contains, then expand the canvases and tab pages to specify the properties of each.

For example, you can specify the title, size, and position of the Summary window. You can choose which tab pages appear on the Maintenance window and specify the label and navigational direction (top to bottom or left to right) in the tabs.

Note: If you make any changes to the properties of a window, canvas, tab, or item and do not want to save them, you can select Clear Record from the toolbar to reset the changes.

6. To set up a checklist tab, see *Defining Checklists*, page 3-237.
7. Expand **Items** to display all the fields and buttons that are used in the template. The window on which each item is displayed is shown in brackets.
8. Select an item to view and update its properties. For example, you can move a field or change its prompt.
9. To add fields that do not currently appear on the template, or remove fields from the template, see: *Adding and Removing Fields on a Template*, page 3-235.
10. Save your work.

Previewing Your New Window

11. Choose Run Template from the Tools menu to see how the window will appear to your users, and to test task flow and right mouse menus.

Important: Before you can preview your window, you must first enable the template and add the new window to a menu. We recommend that you preview your windows on a test database only, to avoid security infringements.

Adding and Removing Fields on a Template

For windows that have been designed using the People Management templates, you can choose to remove fields from the window if your users do not need them and you can add new fields if required.

For a full list of the fields, buttons and other items you can add to a template, see: Fields on the People Management Window, page 3-205.

Note: There is a distinction between removing a field from the template and removing a field from a window. If the field is on the template but hidden in the window, the field data is still active. Hidden fields, however, slow your performance so you should remove fields wherever possible. This procedure describes removing a field from the template so that its data is not used.

To add or remove a field from a template:

1. Open the template using the People Management Configurator tool.

See: Editing a Template, page 3-233.

The template windows are displayed along with the People Management Configurator tool.

Adding a Field

2. To add a field or other item that is not already in the template, expand the Items node, then right-click on Items and choose New from the right mouse menu.

Tip: Add all your new fields in a consistent location, such as the top of the branch, to help you keep track of them. Choose Refresh from the right mouse menu when you want the system to place your new fields in their correct alphabetical position.

3. Click on the list of values icon in the Item Name field to open the Item Names Find window. Search for the field you want to add or enter % to see the complete list.
4. Select the field you want to add and choose OK.

Your new field appears under Items in the navigator.

5. Set the following properties:
 - Tab Page Name
 - Visible
 - Height and width of the field
 - Position - Either use the arrow buttons to move the field around or enter a new position in the X and Y Position fields. As you move a field, you can view how it will appear on the window by looking at the template window.

Note: If you make any changes to the properties of an item and do not want to save them, you can select Clear Record from the toolbar to reset the changes.

You can choose to set other properties for the field. Refer to People Management Configurator Options, page 3-198 for a complete description of all the properties.

See also Adding Flexfields to a Template, page 3-236

Removing a Field

6. To remove a field or button from a template, right-click on the item in the navigator and choose Delete from the right mouse menu.
7. Save your work.

Adding Flexfields to a Template

You can add individual segments of a flexfield to a template you create using the People Management Configurator, or you can add a popup window containing all the segments in a flexfield. For reasons of performance, it is recommended that you use a popup window if you have a large number of segments that you want to add to the window.

Note: You cannot add both individual flexfield segments and a popup window for the same flexfield structure on the same window.

To add individual flexfield segments to a template:

1. Open your template using the People Management Configurator.
See: Editing a Template, page 3-233.
2. Expand Items and locate the flexfield segment.
3. Add the *value* item for the flexfield segment.
See Adding and Removing Items on a Template, page 3-235
4. If the user will be selecting the value for the segment from a value set, enter the *meaning* item so that the longer description is also displayed.

Note: It is your responsibility to ensure that you enter all flexfield segments required by your configuration. If you omit flexfields that you have defined as mandatory, the user will be unable to save records.

To add a popup flexfield window to a template:

1. Open your template using the People Management Configurator.
See: Editing a Template, page 3-233.
2. Expand Items and locate the flexfield items.
3. If you have previously added individual segments of the flexfield to the template, you must first remove all of them. Right-click on each segment of the flexfield and choose Delete from the right mouse menu.

See Adding and Removing Items on a Template, page 3-235

4. Add the *Flexfield Name* Popup item to the window. This adds a popup window containing all of the flexfield segments.
5. Save your work

Defining Checklists

A checklist is a list of user actions related to people management and recruitment, such as "Check References" and "Reimburse Expenses". Against each check item, users can record a status, date due, date achieved, and any notes. The checklists are for user reference only; they do not perform any actions.

Checklists can appear on tabs of template forms: on the Summary window, Maintenance window, or both. These tabs are configurable. You specify which check items are displayed, and which fields are available for entry. There is a limit of ten check items on a tab.

There is also a Checklist window, which you can include in task flows from other windows, such as the People window. The Checklist window is not configurable. On this window, users can select any checklist item that you have defined.

To define checklist items and statuses:

1. Open the Application Utilities Lookups window.
2. Query the lookup CHECKLIST_ITEM.
3. Enter the code, meaning, and optionally a description for each checklist item you want to define.
4. Save your work.
5. Query the lookup CHECKLIST_STATUS.
6. Enter the code, meaning, and optionally a description for each checklist status you want to define.
7. Save your work.

To define a checklist:

1. Open your template using the People Management Configurator.
See: *Editing a Template*, page 3-233.
2. Expand Windows, expand the window on which you want to place the checklist, expand the Tab Pages node, and select the Checklist tab.
3. Enter properties for the Checklist tab, including the tab label.
For a list of the properties you can change for a tab page, see *People Management Configurator Options*, page 3-198.
4. Expand Items and find Checklist 1 Item Code (Maintain) or Checklist 1 Item Code (Summary), depending which window is to include the checklist. If this item does not appear in the items list, you need to add it.
See: *Adding and Removing Fields on a Template*, page 3-235.
5. Enter properties for this item.

To provide a default check item in this field, enter the appropriate lookup meaning in the Default Value property. You must enter the meaning exactly as you typed it in the Application Utilities Lookups window. If you want to prevent users from selecting other check items in this field, set the Insert Allowed property to No.

6. Save your work.
7. To specify the fields that accompany this check item in the checklist, find the following items. If they do not appear under Items, you can add them. If they appear and you do not want them on your checklist, you can remove them.
 - Checklist 1 Status
 - Checklist 1 Date Due
 - Checklist 1 Date Done
 - Checklist 1 Notes
8. Repeat steps 4 to 7 to add up to ten checklist items to your template, using the items Checklist 2 Item Code through Checklist 10 Item Code.

Setting Defaults for Fields in Templates

The templates enable you to default values in many fields.

See Default Values in Template Fields, page 3-190

To set a default for a field:

1. Open the template using the People Management Configurator tool.
See: Editing a Template, page 3-233.
2. In the People Management Configurator navigator, expand Items and select the field for which you want to set a default.
See: Fields on the People Management Window, page 3-205 for a full list of all the available fields.
3. In the Properties section, enter a default value for the field in the Default Value field. There is no list of values available, so you must be careful to type the value exactly as it should appear.
You can also choose not to display the field on the window even though you have set a default value.
4. If you want to hide the field set the Visible Field to No.
5. Save your work.

Setting Up Context-Sensitive Fields In Templates

You can set up fields that are context-sensitive in your templates using the People Management Configurator tool. You can use the following contexts:

- Person type - for example, to hide the Employee Number field when an applicant is selected.
- Descriptive flexfield context - for example, to display address lines in the appropriate sequence for each address style

- Key flexfield structure - for example, to display the appropriate structure of the Personal Analysis Key Flexfield for each Special Information Type.

Note: If a segment is not defined for a particular structure or context in the flexfield definition, it does not appear on the form even if you set it up for that context in the People Management Configurator.

To set up a context-sensitive field:

1. Open your template using the People Management Configurator.
See: Editing a Template, page 3-233.
2. In the navigator, expand Items and find the field that you want to make context-sensitive.
3. Set the properties for the default field. You may want to hide the default field so that it only appears in the contexts that you define.
4. Expand the field, right click on Contexts, and choose New from the right mouse menu. You set up a 'child' context field for each context in which you want the field displayed.
5. In the Properties section, select a value in the Context Type field: Descriptive Flexfield, Key Flexfield, or QuickHire Person Type.
6. In the window that displays, enter the context in which this field should display and choose OK.

For a descriptive flexfield, select the Application, Title, and Context. For example, this could be Oracle Human Resources, Personal Address Details, and United Kingdom respectively. For a key flexfield, select the Application, Title, and Structure. For a QuickHire Person Type, select the person type.
7. Choose the tab you want the field displayed on for this context and set any other properties, such as position or tool tip text.
8. Repeat steps 4 to 7 for each context in which this field should display.
9. Save your work.

Setting Up DateTrack History on Fields in Templates

You can set up DateTrack History for datetracked and dated fields on a template. This has two effects:

- Users can then right-click in the field and choose DateTrack History to see a history of changes that have been made to that field.
- The field appears in the drop down list by the timeline bar. If you select the field in the drop down list, the timeline shows the dates of changes to this field.

To set up DateTrack History on a field:

1. Open your template using the People Management Configurator.
See: Editing a Template, page 3-233.
2. Expand Items and find the field.
3. Select the flexfield [] at the bottom of the Properties section.

4. Enter Yes in the DateTrack History field.
5. Save your work.

Setting Up More Information on Fields in Templates

You can set up more information to be available to users on each of the fields you include in a template using Oracle FastFormula. The user can right-click in a field and choose a prompt that you specify. For example, you might want to enable the display of a supervisor's email address from the Supervisor field. From the Job field, you might show the normal working conditions for the job.

For examples of how you can set up more information see the Supervisor and Position fields in the predefined Hiring Applicants and Maintaining Employees templates.

To set up more information on a field:

1. Open your template using the People Management Configurator.
See: *Editing a Template*, page 3-233.
2. Expand Items and select the field for which you want to set up more information.
3. Enter a formula name in the Information Formula field.
You create the formula using Oracle FastFormula.
See: *Writing Formulas for Templates, Oracle HRMS FastFormula User Guide*.
4. Enter a label explaining the information available in the Information Prompt field. This prompt is displayed in the right mouse menu when a user right-clicks on the field.
5. Enter up to five inputs for the formula in the Information Formula Parameter Fields.
6. Save your work.

Adding a People Management Template Window to a Menu or Task Flow

When you create your own version of a window using the People Management Configurator, you need to add your new window to a menu or task flow so that users can access it.

To create a function for a window:

1. You must define a function to call the window. When you define the form function, use parameters to specify the template name, and, if necessary, the customization name and task flow name (separate the parameters by spaces). For example:

Function: PERWSQHM_CUSTOM_MAINTAIN_EMPS

Parameters: TEMPLATE_NAME="PER_MAINTAIN_EMPS" HR_CUSTOMIZATION="MedicalSIT" WORKFLOW_NAME="EMP_DEVELOPMENT"

If your enterprise uses assignment-level security, you can add a function parameter to enable this functionality.

Parameter: SECURE_ON_INDIVIDUAL_ASG="YES"

For more information, see: *Assignment-Level Security*, page 1-27

For a description of the HRMS parameters you can use when you define functions, see: *Using Parameters for HRMS Form Functions*, page 1-98.

Note: Assignment-level security is currently available for the following windows:

- People Management templates (PERWSQHM)
- Assignments (PERWSEMA)
- Combined Person and Assignments (PERWSHRG)

Adding a window to a menu:

2. You can add the function to any menu.

For more information about adding your configured window to a menu see: *Menus Window, Oracle Applications System Administrator's Guide*

Adding a window to a task flow:

3. You can create a new task flow for the window. People Management windows must always be the first window in the task flow.

See: *Define Task Flows*, page 3-177

Note: If you want to use a version of the People Management window that you have restricted using CustomForm in a task flow, you must first define a new task flow node and then define a menu function to call the task flow.

See: *Adding a Custom Window to a Menu or Task Flow*, page 3-248

Restrict Windows Using CustomForm

CustomForm

Many of the standard Oracle HRMS windows are multipurpose. For example, in the People window, you can enter or view details of employees, applicants, contingent workers, contacts, or other person types that you have defined. In the Element Entries window, you can make entries for all the elements you have defined.

You might prefer to have multiple versions of these windows, each version being used for just one purpose. This approach restricts the list of values on certain fields and therefore provides for faster data entry. It also enables you to limit access to certain types of information.

For example, you might create a version of the View Element Entry History for Employee window that does not display the earnings elements representing salary, bonus, and commission. Most users' menus would only give them access to this version of the window. For the small group of people authorized to view salary, bonus, and commission figures, your system administrator can define a menu function to allow access to the standard window.

You can do this using *CustomForm*.

Restricting Access to People Management Templates

When you create a people management template using the People Management Configurator (see People Management Configurator, page 3-186), you can specify whether the template handles employees, applicants, contingent workers or a combination of all three. This is a quick way to restrict your template windows by system person type. If you need to restrict the template windows by user person type, you can use CustomForm to create a restricted version of your template.

Important: Make sure that the criteria you enter in the Form Customization window do not conflict with any restrictions you put on the template using the People Management Configurator. For example, if you restrict the template to Applicants Only in the People Management Configurator then create a version that only handles the user person type Graduate Intake (a type of employee), users will not be able to find any people using the template.

You can also use CustomForm to restrict People Management templates in other ways. You can restrict the special information types, extra information types, actions, and notifications that are available from your templates. You can also control the fields available for searching and the new records (applicant, employee, contingent worker, assignment or application) that users can create using the templates.

Windows you can Restrict using CustomForm

You can use CustomForm to restrict the information available in the windows listed in the table below. We also identify the criteria you can use to restrict access to information.

Window	Restrict By	Values
Adjust Balance: (Oracle Payroll form)	Element Set	User defined
Adjust Balance: (Oracle Payroll form)	Element Processing Type	Recurring, Nonrecurring
Assignment Folder	Person Type	User defined
Element Entries	Element Set	User defined
Element Entries	Element Processing Type	Recurring, Nonrecurring
Element Entries	Entry Type	Override
Event Bookings	Employee or Applicant	Employee, Applicant
Extra Assignment Information	Extra Information Type	User defined
Extra Element Information	Extra Information Type	User defined
Extra Job Information	Extra Information Type	User defined
Extra Location Information	Extra Information Type	User defined
Extra People Information	Extra Information Type	User defined
Extra Position Information	Extra Information Type	User defined
List Employees by Element	Element Set	User defined
List Employees by Element	Element Processing Type	Recurring, Nonrecurring
List People by Special Information	Employee or Applicant	Employee, Applicant
List People by Special Information	Special Information Type	User defined
List People by Special Information	Person Type	User defined
Organization	Organization Classification	List of Organization Classifications
Payroll and Assignment Processes: (Oracle Payroll form)	Action Type	List of Action Types (e.g. Run, Pre-payments, Reversal)
People Folder	Person Type	User defined
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Action	User defined

Window	Restrict By	Values
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Function	User defined
People (PERWSEPI), People and Assignment (PERWSHRG): (Enter Personal Information)	Person Type	User defined
People Management	Person Type	User defined
People Management	Special Information Type	User defined, and some may be predefined
People Management	People Extra Information Type	User defined, and some may be predefined
People Management	Assignment Extra Information Type	User defined, and some may be predefined
People Management	Actions	List of available actions such as Hire Applicant
People Management	Workflow Notifications	Notifications defined in workflow; some predefined, you can add others
People Management	New Objects	New Applicant, New Employee, New Application, New Assignment
Position Occupancy Folder	Employee or Applicant	Employee, Applicant
Run QuickPaint Report	QuickPaint Inquiry	User defined
Run QuickPaint Report	Person Type	User defined
Run QuickPaint Report	Assignments	Assignment Sets, Assignments
Special Information	Special Information Type	User defined
Table Values: (Define User Values)	Table Name	User defined
View Element Entry History for Employee	Element Set	User defined
View Element Entry History for Employee	Element Processing Type	Recurring, Nonrecurring

Types of Data Restrictions

You can restrict the information that appears in a window by the following sorts of criteria:

- Element processing type (recurring or nonrecurring)
- Element set (user defined)
- Person type (user defined)
- Special information type (user defined)
- Organization classification
- Employee, applicant, or contingent worker

Note: If you choose to restrict access to your form by person type, you select the person type and then choose whether to include or exclude this person type.

- QuickPaint report (user defined)
- Extra Information Type (user defined)
- Action for People Management
- Workflow notification (user defined)
- New objects that you can create using the People Management window
- Fields you can search on using Advanced Find in the People Management window. The fields you select are *excluded* from the Advanced Find.

Important: When you use a standard window, all types of information are available. When you use a configured version, you can only see the types of information that were selected on the Form Customization window. However, there is one exception. When you restrict the People Management window by Advanced Find Item, you can search in the configured version of the window on all Find items *except* the ones you selected on the Form Customization window.

If you want to restrict the data by a user defined information type, you must create it first:

- To restrict by element set, create the set in the Element and Distribution Set window.
See: Defining an Element or Distribution Set, *Oracle HRMS Compensation and Benefits Management Guide*
- To restrict by QuickPaint Report, create the report in the Define QuickPaint Report window.
See: Defining QuickPaint Reports, page 4-27
- To restrict by Special Information Type, define your information type as an instance of the Personal Analysis key flexfield.
See: Setting Up Special Information, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*
- To restrict by person types, define your user person types in the Person Types window.
See: Defining Person Types, *Oracle HRMS Enterprise and Workforce Management Guide*
- To restrict by Extra Information Type, define your information type as an instance of the appropriate extra information flexfield.

See: Setting Up Extra Information Types (Excluding Organization EITs), page 3-26

- To restrict by workflow notification, create your notifications using Oracle Workflow.

Using the Include and Exclude Restrictions

With selected restriction types, you can choose to include or exclude specific types. This is currently only possible with the Person Type restriction. In this case, the system checks whether any of the person types assigned to a person match any of the person types included or excluded using the Person Type restriction.

The different scenarios are best illustrated using examples. In each case, the employee has the person types of Employee and Applicant.

Scenario 1

Included Person Type	Excluded Person Type
Employee	

Result: The employee is visible in the form. In this case, all persons with the person type of Employee are visible.

Scenario 2

Included Person Type	Excluded Person Type
	Employee

Result: The employee is not visible in the form. In this case, all persons with the person type of Employee are excluded and all other persons are visible.

Scenario 3

Included Person Type	Excluded Person Type
Employee	Applicant

Result: The employee is not visible in the form. Even though the employee has the Person Type of Employee, which is included according to the restriction, the Excluded Person Type of Applicant takes priority over the Included Person Type and the employee is not visible in the form.

Note: It is not possible to include and exclude the same person type.

Using CustomForm

Use CustomForm to configure a certain set of windows by setting restrictions in them. For example, you can use CustomForm to restrict the elements that users can enter using the Element Entries window.

You can also use the People Management Configurator to modify predefined templates and create windows that match your business processes.

See: Using the People Management Configurator, page 3-231

To configure a window using CustomForm:

1. If you are restricting the information that appears in the configured window by a user defined entity (such as an element set, person type, special information type, or QuickPaint report), ensure that this entity is already defined.

See: Types of Data Restriction, page 3-244

2. Define a configured version of the window using the Form Customization window.

See: Configuring a Window With CustomForm, page 3-247

3. Add the new window to a menu or task flow.

See: Adding a Configured Window to a Menu or Task Flow, page 3-248

Configuring a Window With CustomForm

You can define your own versions of templates and some standard windows in the Form Customization window.

See: List of Configurable Windows, page 3-242

Note: If you want to restrict access to query-only for a window, you do not need to create a separate version. Instead you create a new form function, setting the QUERY_ONLY parameter to YES.

See: Restricting Access to Query-only Mode, page 1-98

To define restrictions for a window:

1. Select the name of the window in the Form to be customized field.
2. Enter the name of your new version in the Name field. This name is used when defining menus but it is not seen by users.
3. Select Enabled if you want the restrictions to come into effect. If you do not select this option, the configured version of the window behaves the same way as the standard version.
4. Enter the titles to appear in the new version of the window:
 - In the Standard Title field, enter the window title to be seen by users who can use the window for data entry and editing.
 - In the Query Title field, enter the window title to be seen by users who have view-only access to the window.

Note: If you are configuring a template, the titles entered for the template in the People Management Configurator window override those entered here.

5. Save your new version.
6. In the Restrictions block, select the Type and Value of the restrictions you want to define. The types and values available depend on the window you are configuring.

Note: If you are using the Person Type restriction, you can choose whether to include or exclude the selected person type using the available radio buttons. If you select any other type of restriction, the radio button is automatically set to Include.

Adding a Custom Window to a Menu or Task Flow

When you create a restricted version of a window using CustomForm, you need to add your new window to a menu or task flow so that users can access it.

Adding custom windows:

1. If you want to add the custom window to a task flow, you must create a Task Flow Node for it.

See: Define Task Flow Nodes, page 3-177

2. If the window is called directly from the Navigator window, you must define a menu function to call the custom version of the window. You can add the function to any menu.

For a description of the HRMS parameters you can use when you define functions, see: Using Parameters for HRMS Form Functions, page 1-98.

Note: If you want to use a custom version of the People window, People Folder, or Assignment Folder to start a task flow, you should define a new task flow node and then define a menu function to call the task flow.

For more information about adding your custom window to a menu see: Menus Window, *Oracle Applications System Administrator's Guide*

Additional Configuration Options

Additional Configuration Options

There are some additional configuration options that your organization may need to set up, depending on the requirements of your system. These include:

- Enabling Currencies, page 3-252
- Setting up Printers, page 3-249
- Setting up International HRMS. See: What is International HRMS?, page 3-250

Setting Up Your Printers

To run reports in Oracle HRMS, you need to associate the following predefined print styles with your printer driver:

- XX PS Portrait
- XX PS Landscape
- XX_Cheque

Note: XX represents your country code, such as ZA.

You do this using the Printer Types window.

See: Setting Up Your Printers, *Oracle Applications Systems Administrator's Guide*.

Examples of Printer Driver and Printer Types

Example postscript printer driver (HP LaserJet 4000)

Driver Name:	A4PS
User Driver:	A4 POSTSCRIPT
SRW Driver:	A
Driver Method:	Command
Arguments:	lp -d\$PROFILES\$.PRINTER -n\$PROFILES\$. CONC_COPIES -t"\$PROFILES\$.TITLE" \$PROFILES\$.FILENAME

Table 1-6 Example of the South African cheque printer driver (HP LaserJet 4000)

Driver Name:	A4CHEQUE
User Driver:	A4 CHEQUE
SRW Driver:	HPA
Driver Method:	Select Command
Arguments:	lp -d\$PROFILES\$.PRINTER -n\$PROFILES\$. CONC_COPIES -t"\$PROFILES\$.TITLE" \$PROFILES\$.FILENAME
Initialization:	/eE/e(s0P/e&l0O/e&l8D/e&l26A/e&k2S/ e(8U/e(s0p12h0s0b4099T/e&l25E
Reset:	/eE/000

Example Printer Type (HP LaserJet 4000)

Style	Driver Name
PS Landscape	A4PS
PS Portrait	A4PS
Cheque	A4CHEQUE

What is International HRMS?

International HRMS is a set of standard data categories that provide the foundation for a localized version of HRMS. You can use International HRMS to set up a localized version of HRMS provided that your localization is not already supported.

You are not obliged to use International HRMS to set up localized data. If you prefer, you can set your own localization by following a series of manual steps. However, the advantages of using International HRMS to set up a localization are:

- It is quicker to install
- It is easier to install
- It is easier to support once you have installed it.

How Do You Use International HRMS to Create a Localization?

You apply hrglobal and then run the concurrent program International HRMS Setup. For further details of the exact sequence, see Overview: Using International HRMS to Define a Localization, page 3-251.

What is Included in International HRMS Phase 1

International HRMS Phase 1 includes all of the following data definitions:

- Business rules

- Element Classifications
- Bank Key Flexfield and legislative rule for bank key flexfield
- Total payments balance and supported dimension, route, defined balance.

Legislation Rules

This legislation rule is supplied with International HRMS Phase 1:

```
legislation_rule
(p_legislation_code => p_legislation code
,p rule_type => 'E'
,p rule_mode => 'ZZ Bank Details'
```

Element Classifications

These element classifications are supplied with International HRMS Phase 1:

- Information
- Earnings
- Absence
- Supplemental Earnings
- Taxable Benefits
- Pre-tax Deductions
- Tax Deductions
- Direct Payment
- Employer Charges
- Involuntary Deductions
- Voluntary Deductions

Routes

The only route available with International HRMS Phase 1 is Global Payments.

Balance Dimensions

The only balance dimension available with International HRMS Phase 1 is Payments.

Balances

The only balance available with International HRMS Phase 1 is Total Payments.

Overview: Using International HRMS to Define a Localization

You apply International HRMS standard data by following this sequence:

1. Install HRMS
2. Apply patch 2574811 to provide the standard set of data categories needed in every legislation
3. Run hrglobal

4. Apply patch 2574861 to provide a translated set of data for the particular legislation that you are installing
5. Run the concurrent program International HRMS Setup.

See: Running the International HRMS Setup Process, page 3-252

Enabling Currencies

Oracle HRMS enables you to use multiple currencies for entering information about employee compensation and benefits. You can also record your payment methods to employees in different currencies.

For example, if you have employees living and working temporarily in other countries, you might want to record specific earnings or deductions for these employees in local currencies. You might also want to pay these employees a fixed amount into a bank account in their home currency. The remainder you would pay in a local currency.

Your startup data includes the definitions of all world currencies. These definitions are shared by all Oracle Applications and are controlled by the system administrator responsibility. You enable those currencies you want to use in the Currencies window.

Note: You must enable at least one currency as the default currency for all information related to money in your system. This default is known as the *Base Currency* for your Business Group.

To enable a currency:

1. Query the currency you want to enable and check the Enabled check box. Save your choice to enable the currency.

You can never delete a currency, but you can disable it.

To disable a currency:

1. Uncheck Enabled, or enter an End Date for the currency.

Running the International HRMS Setup Process

Use the International HRMS Setup process to apply a standard set of data when you are installing a legislation that is not currently supported. You do this after you have:

1. Installed HRMS
2. Applied patch 2574811
3. Run hrglobal
4. Applied patch 2574861

You run the International HRMS Setup process from the Submit Requests window.

To run the International HRMS setup process:

1. Enter your legislation. You can only do this for a legislation that is not currently supported.
2. Enter the currency for your legislation.
3. Enter the Tax Year Start Date.

4. Decide whether you want to use tax units.
5. Choose OK, and then submit your process.

This creates a legislation with the name, default currency, and tax year details that you specify. When you have completed these setup steps you can then add specific data for your legislation.

Using the Person Name Format Function

The person name format function enables you to specify how a person's name is returned in custom applications or reports etc. You use tokens to specify the format in which you want to see the name. You can call the function in various ways, including PL/SQL, SQL etc.

Note: This function cannot be used to format how names are displayed in windows in the application.

The tokens that you can use are as follows:

- \$FI - First Name
- \$MI - Middle Name
- \$LA - Last Name
- \$PR - Prefix
- \$SU - Suffix
- \$TI - Title
- \$FU - Full Name
- \$KN - Known As
- \$IF - Initial First
- \$IM - Initial Middle

A series of tokens are passed into the routine and the formatted name is returned.

If the date being passed to the routine is null then the system date is used. Likewise if the format being passed is null then the full_name is returned. If the person_id used is not valid, then an error is raised.

SQL Example 1

You can use a profile to define the name format you required. This ensures that all your reports or customizations to retrieve the name uniformly. If you then decide to change the profile value, the change is reflected everywhere you use the profile value as one of the parameters.

If you create a new profile called XX_NAME and assign the value \$FI.\$LA to it, you can use the following SQL to retrieve the name of person with the ID 972:

```
SQL> select hr_person_name.get_person_name(972,null,fnd_profile.v  
       value('XX_NAME')) from dual;
```

This returns the name in the format: Antonio.Bortoliero

SQL Example 2

The following example shows how to use the new function to retrieve the same person's name as of two days before the current system date:

```
SQL> select hr_person_name.get_person_name(972,sysdate-2,'$FI.$MI  
.$TI') name from dual;
```

This returns the name in the format: Antonio.D.Doctor

PL/SQL Example

The following shows a simple PLSQL use of the function:

```
declare  
    l_name varchar2(2000);  
begin  
    l_name := hr_person_name.get_person_name  
                (p_person_id      => 972,  
                 p_date           => trunc(sysdate),  
                 p_format         => '$FI.$LA');  
end;
```

In this example l_name would contain the name in the format 'Antonio.Bortoliero'.

Workforce Intelligence

Information Access Overview

Oracle HRMS provides a range of inquiry and reporting mechanisms to meet the needs of different users:

- Predefined Discoverer Workbooks that you can use directly, or edit to meet your own reporting requirements.
- Discoverer End User Layer folders that you can use to create your own Discoverer Workbooks.
- Inquiry windows (including folders)
- Predefined reports that can be scheduled and grouped for periodic processing
- QuickPaint, to create your own online inquiries and reports about people and assignments
- Multilingual reporting for some reports
- Use of desktop tools for reporting or editing HRMS data. For example, you can use Application Data Exchange (ADE) to download information to a spreadsheet, and then upload the modified data to HRMS.

Discoverer Workbooks

Oracle Discoverer is a data query and analytical tool that enables you to perform detailed analysis of the human resources issues that interest you. Discoverer uses an End User Layer (EUL), which is based on a series of business views, to build worksheets and workbooks that report on the data from the underlying HRMS application. There are a number of predefined workbooks, which you can refine by specifying worksheet parameters; you can also build your own workbooks.

Discoverer End User Layer

HRMS contains a predefined End User Layer where the data in the underlying database tables is organized in Discoverer as folders. The folders are organized into Business Areas. You can use this End User Layer to create your own Discoverer Workbooks.

See: Discoverer End User Layer Business Area Descriptions, page 4-6

Inquiry Windows

Oracle HRMS includes some inquiry windows to meet the most common online reporting requirements. In these windows, you typically enter selection criteria in the first block then choose the Find button to view a list of people, assignments, or other entities that match your criteria. Some of these windows use *folders* to display the information retrieved by your criteria.

Folders are online views that you can configure. By default, the folder block in an inquiry window displays all records matching your inquiry and all fields available within the folder. However, you can create your own folders to display a subset of these records and fields. You can also choose the field labels, their size and order, and the sort sequence of the retrieved records.

For example, in the Assignment Folder window, you could create a folder called Sales Employees by Grade. This folder has the query criteria Organization = "Sales", and it is sorted by grade.

Predefined Reports

There are a number of predefined reports that you can use immediately without any further set up. They have a predefined format but you can choose which records to view by entering a set of parameters when you submit the report.

You can also create your own reports using Oracle Reports or SQL*Plus or another tool of your choice. You can register them with Application Object Library. This means you can run them from the standard Submit Requests window, and you can schedule them in report sets with other reports and processes.

Multilingual Reporting

Oracle HRMS enables you to print reports in the language of your choice.

HR Reports

You can select in which language the following reports are printed:

- Full Person Details
- Full Applicant Details
- Full Assignment Details
- Full Work Details

See: Submitting a Request, *Oracle Applications User's Guide*

Payroll Reports

Payroll reports are usually submitted in the language of your Business Group, for example the US Check writer can only be printed in American English and the GB Deposit Advice can only be printed in English. However, you may be able to print payroll reports in multiple languages if your localization team has created legislation specific reports for you to use.

Note: The default HRMS payrolls for the US and UK can only be run in English.

Using Oracle HRMS with Spreadsheets

You can use Oracle Application Data Exchange (ADE) to download information from the HRMS database to a spreadsheet for analysis and manipulation. For example, you can download data on current and proposed salaries for a group of employees. You can adjust the salary proposals in the spreadsheet, or enter new ones, and upload the revised data to the database. The ADE upload process reports any errors and ensures that only valid data is saved in the database.

To download information from a form to a spreadsheet using ADE, your system administrator needs to create a style in ADE. The style defines the form it is used for, the responsibilities that can use it, and the columns (or fields) to be downloaded. You determine which records are downloaded by running a query in the form before launching ADE.

A style for downloading salary proposals is predefined.

See *Using Application Data Exchange*.

QuickPaint

QuickPaint is a powerful and flexible tool to design reports about assignments in the format you require. You can include the following sorts of information in a QuickPaint report:

- Personal information
- Contact information
- Assignment information
- Application information
- Compensation and benefit information
- Descriptive flexfield information

Once you have designed a QuickPaint report, you and other users can run the report online for any assignment or set of assignments. You can view the results online or print them.

Configuring the Run QuickPaint Report Window

Using the standard QuickPaint Report window, you can run the report for an assignment or an assignment set. The assignments can be held by current employees or applicants.

Your system administrator can create configured versions of this window to restrict the reports you can run and the people you can report on. A configured version might be subject to one or more of the following restrictions:

- Report on one person type only (employees OR applicants).
- Run one report only.
- Report on single assignments only, or report on assignment sets only.

If the window is subject to the third type of restriction, it will look different to the standard version since it will contain either the assignment region or the assignment set region, but not both.

Attachments

You can add attachments to a large number of HRMS records. Examples of attachments are word processed documents, Web pages or video images.

Information Access

Does Oracle HRMS provide flexible access to information?

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

- Performing a full range of HR functions on a day-to-day basis
- Reporting on HR activities
- Performing what-if exercises to determine the viability of alternatives scenarios
- Performing strategic planning with the Business Intelligence System

How can you use Oracle HRMS to support typical HR activities?

You can extract details about a single employee or a group of employees. Particular examples are:

- Selecting an employee or a set of employees for HR processing
- Extracting HRMS information to produce standard letters
- Viewing organization hierarchies and position hierarchies
- Viewing a historical record of previous changes

What range of reporting options are available in Oracle HRMS?

When you are reporting on activities using HRMS you may want to use each of the following reporting options depending on your business purpose:

- Define a report using parameters that you supply
- Run a predefined report
- Specify the intervals at which a report should run
- Combine several reports into a set so that they can be run at the same time
- Run a predefined Discoverer workbook.
- Create a Discoverer workbook based on the predefined End User Layer.

Can you pose "what-if" scenarios?

There will be occasions when you want to see the effect of a proposed change before deciding whether to implement it. For example, you may want to calculate the effect of a salary change for a range of employees. In these circumstances it would not be appropriate to change the data in HRMS until you have assessed the implications. Oracle HRMS allows you to transfer a copy of current data to your desktop so that you can test a succession of modifications before uploading the data to HRMS.

Can you use Oracle HRMS information for strategic planning?

Using the Business Intelligence System you can:

- Establish a set of Key Performance Indicators to provide measures of compliance for each of your business activities
- Produce reports to illustrate trends and identify future business strategy
- Make integrated use of individual reporting tools to solve complex enquiries

Can you run multilingual reports?

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

Administering Workforce Intelligence

Discoverer Workbooks and End User Layer

HRMSi uses Oracle Discoverer to create ad hoc workbooks containing worksheet reports and graphs. HRMSi supplies a set of workbooks that you can amend to meet your enterprise's specific requirements. You can also use Discoverer User to create your own workbooks, based on the supplied Discoverer End User Layer (EUL).

You can find full instructions on developing the Discoverer EUL and creating and maintaining Discoverer workbooks in the *Oracle Discoverer Plus User's Guide* and the *Oracle Discoverer Plus Administrator's Guide*.

Discoverer Workbooks

Each workbook holds a set of related worksheets. A worksheet is simply a report that returns data from a SQL query. The workbook may contain calculations and conditions that can restrict the report in various ways.

You can access Discoverer workbooks from the Self-Service menu. You can use parameters to specify the data range you want in your report. The worksheets are displayed in Discoverer Viewer.

Discoverer End User Layer

The end user layer (EUL) comprises a set of business areas, containing folders. The folders contain items that map to table columns. The folders can map to one or more database table. The folders present that data in a structure that is suitable for reporting.

There are two types of business areas: administrative and functional. The administrative business areas contain all folders. The purpose of the administrative areas is to give report developers access to all the folders to enable them to create ad hoc reports.

The functional business areas contain folders that support reporting for a specific business function, such as iRecruitment. Folders can exist in one or more functional business area. Workbooks are typically based on folders from one functional business area. You can grant users access to one or more functional business area, depending on which reports they require.

Discoverer End User Layer Business Area Descriptions

The HRMS Discoverer End User Layer provides folders that access the data from the HRMS transactional tables. You can use these folders to create your own Discoverer reports. The End User Layer organizes the folders into two types of business areas: Administrative, and Functional.

Administration Business Areas

Use the Administration business area to produce detailed ad-hoc reports specific to the needs of your enterprise.

HRMS - Administration - Oracle Human Resources

The HRMS – Administration – Oracle Human Resources business area is a composite set of Discoverer folders focusing on different entities of the Oracle Human Resources

system, such as salaries, benefits, jobs, grades and assignments. The related Lists of Values folders are in a separate business area.

Use the HRMS – Administration – Oracle Human Resources business area to produce detailed ad-hoc reports specific to your human resources needs.

HRMS - Administration - Oracle Human Resources (Lists of Values)

The HRMS – Administration – Oracle Human Resources (Lists of Values) business area contains all the Lists of Values folders relating to the Oracle Human Resources system. The folders in this business area do not appear anywhere else.

This business area is for internal use only.

HRMS - Administration - Oracle Training Administration

The HRMS – Administration – Oracle Training Administration business area is a composite set of Discoverer folders focusing on different entities of the Oracle Training Administration system, such as training events, training activities, student enrollments and event resources.

Use the HRMS – Administration – Oracle Training Administration business area to produce detailed ad-hoc reports specific to your training administration needs.

HRMS - Administration - Oracle iRecruitment

The HRMS – Administration - Oracle iRecruitment business area focuses on the vacancy and job posting details, recruitment activities, candidate details and applicant information within your enterprise.

Functional Business Areas

These business areas are grouped by function. They enable you to restrict users to a functional area in which they can develop or access workbooks specific to their functional role.

HRMS - Compensation and Benefits

The HRMS – Compensation and Benefits folders focus on entities specific to employee remuneration. From these folders you can produce ad-hoc reports summarizing and detailing such information as salary against grades and jobs.

HRMS - General Employment Practices

The HRMS – General Employment Practices folders focus on entities specific to employment practices. Using this functional business area you can produce ad-hoc reports covering such issues as equal opportunities, minority employment, disability accommodations, work related injuries, health and safety, disciplinary actions, grievances and interpersonal conflicts.

HRMS - Implementation and Data Set-Up

The HRMS – Implementation and Data Set-up folders provide information on system setup and data.

HRMS - Training Management

The HRMS Training Management folders relate to the management of training, where the enterprise is a training provider.

HRMS - Workforce Budgeting

The HRMS – Workforce Budgeting functional business area covers all aspects relating to creating budgets. The folders contain budget information together with assignment, job, location, organization assignment, and supervisor information.

HRMS - Workforce Composition and Activity

The HRMS – Workforce Composition and Activity folders show how employees are spread throughout various areas such as jobs, geography, minority groups, and business groups. Activity information is concerned with changes in the workforce (for example, organization transfers).

HRMS - Workforce Costing

The HRMS – Workforce Costing business folders focus on costs associated with the workforce, such as the cost of training, direct payments to employees, and assignment costings.

HRMS - Workforce Development and Performance

The HRMS – Workforce Development and Performance folders focus on issues such as competency information, internal training and success.

HRMS - Workforce Recruitment

The HRMS – Workforce Recruitment folders provide information on workforce recruits, such as competencies, employment history, education, and qualifications. It also provides analysis of employee movement within and between organizations.

HRMS - Workforce Separation

The HRMS – Workforce Separation folders provide information on staff turnover, including categorizing the reasons people leave or move within an organization.

HRMS - Workforce Utilization and Productivity

The HRMS – Workforce Utilization and Productivity folders focus on issues such as how well the workforce is utilized (working hours, absence) and how productive they are.

Programs to Populate Workforce Intelligence Discoverer Reports

Many Workforce Intelligence reports rely on collected data, stored in summary tables, in order to run efficiently. You need to collect data from your transaction tables regularly so that the information in your reports is up to date.

You collect the data by running pre-defined concurrent programs, as described below.

For information on concurrent programs, see: *Overview of Concurrent Processing, Oracle Applications Developer's Guide*

BIS Load Organization Hierarchy Summary Table

This program creates the organization hierarchies on which HTML reports are based. When you run this program, it collects organization hierarchy structures into the HRI_ORG_PARAMS and HRI_ORG_PARAM_LIST tables to improve reporting performance.

Prior to running the concurrent program, ensure you have one hierarchy marked as the primary hierarchy. If no hierarchy is nominated as the primary hierarchy, BIS Load Organization Hierarchy Summary Table will not pick up your hierarchies.

Add the BIS Load Organization Hierarchy Summary Table concurrent program to a request group using the Request Group window. The request group must be used by the responsibility that runs the concurrent program.

Schedule and run the request group using the Submit Request window.

Important: After running each BIS Load Organization Hierarchy Summary Table request you are advised to run the system administrator request Gather Schema Statistics for the HRI schema. This will ensure that you gather statistics from the BIS Load Organization Hierarchies request.

Parameters

There are no parameters for this program.

Run frequency

You must also run this program when there are changes to organization hierarchies and you want to reflect them in your reports. Reports will not display accurate information if you do not run this program periodically to update the summary tables.

You should therefore ensure that the concurrent program is run at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the program.

HRI Load All Organization Hierarchy Versions

This concurrent program collects your organization hierarchy structures into the HRI_ORG_HRCHY_SUMMARY table to improve reporting performance. It will perform a full refresh of all the data.

Parameters

There are no parameters for this program.

Run frequency

Run the HRI Load All Organization Hierarchy Versions concurrent program at implementation.

You must also run this program when there are changes to organization hierarchies and you want to reflect those changes in your reports. Reports will not display accurate information if you do not run this program periodically to update the summary tables.

You should therefore ensure that the concurrent program is run at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the program

HRI Load All Supervisor Hierarchies

The HRI Load All Supervisor Hierarchies concurrent program populates the Supervisor Hierarchy Summary Table with current and historic supervisor hierarchy data

Note: The program only collects the relationships between primary assignments in order to structure the supervisor hierarchy.

Parameters

HRI Load All Supervisor Hierarchies concurrent program has the following parameters:

- **Full Refresh – Yes / No**

If you set Full Refresh to Yes, the program will delete all information previously held in the summary table, and will recalculate the supervisor hierarchy history for the entire collection date range specified (see the Collect From Date / Collect To Date parameters).

If you set Full Refresh to No, the program will delete none of the existing table information. It will update the summary table incrementally with any supervisor hierarchy changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

The program runs faster if you set the Full Refresh to No.

The default value of this parameter is Yes the first time the program is run, and No thereafter.

- **Collect From Date / Collect To Date**

These parameters define the start and end dates of the collection range. The program will store any supervisor changes occurring (date effectively) between these dates in the summary table.

This date range initially defaults to be the last five years. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date

Run frequency

At implementation, run the concurrent request, HRI Load All Supervisor Hierarchies, with the following parameter values:

Parameter	Implementation Value
Collect From Date	The earliest date required for supervisor information (default is five years previous)
Collect To Date	The current date (default)
Full Refresh	Yes (default)

After implementation, run the HRI Load All Supervisor Hierarchies concurrent program infrequently in full refresh mode, and frequently in incremental mode to capture and

report on supervisor hierarchy changes in your enterprise (see the discussion on Full Refresh, above).

If a system failure occurs, you must restart the program

Error Handling

Loops in the supervisor hierarchy will cause the program to print an error message in the concurrent program log. A loop will occur if, for example, A supervises B, B supervises C, and C supervises A. In this case, the program will enter the person-IDs of the supervisors in the loop in the log.

Corrupt data may also produce error messages in the concurrent program log, for example, where an assignment has two date-tracked records that overlap, as shown in the table below:

Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Organization
10	1 Jan 2000	24 Apr 2000	Organization 1
10	1 Apr 2000	31 Dec 2000	Organization 2

In this example, the assignment records overlap on 1st to 24th April. To correct this situation, you should find the correct date of the organization transfer, and update the assignment record. If, for example, the transfer occurred on the 25th April, the data should be corrected to:

Corrected Assignment With 2 Date-Tracked Records

Assignment Number	Start Date	End Date	Organization
10	1 Jan 2000	24 Apr 2000	Organization 1
10	25 Apr 2000	31 Dec 2000	Organization 2

HRI Load Workforce Measurement Value History

Many reports use Workforce Measurement Values (WMVs), for example, Workforce Losses, Workforce Gains, and Workforce Count. WMVs include headcount and full-time equivalent (FTE) assignment budget values. Calculation and collection of this data could involve repeatedly running FastFormula for each assignment every time a report is run, which is expensive and increases the time taken to display the report.

To reduce the number of times the FastFormula is run, a summary table exists which holds a history of the FTE and headcount WMVs for all assignments over the collection date range. The table ensures you are getting the best possible performance from your reports.

You need to populate the summary table with the WMVs used by your reports. To populate the table, you need to run the concurrent program HRI Load Workforce Measurement Value History.

The HRI Load Workforce Measurement Value History request is not used by all reports; some reports still calculate WMV at the time of running.

Parameters

The concurrent program HRI Load Workforce Measurement History uses the following parameters:

- **Full Refresh – Yes / No**

If you set Full Refresh to Yes, the program will delete all information previously held in the summary table, and will recalculate the WMV history for all assignments over the entire collection date range specified (see the Collect From Date / Collect To Date parameters). Use this mode the first time you run the program.

If you set Full Refresh to No, the program will delete none of the existing table information. It will update the summary table incrementally with any WMV changes that occurred within the collection date range specified (see the Collect From Date / Collect To Date parameters).

The program will run faster if you set the Full Refresh to No.

The following constraints apply:

- If WMVs are updated in the forms interface, the summary table will not reflect this change until you re-run the program, and only if you include the effective date of the correction (not the actual date the correction was made).
- The summary table will not reflect historical changes if you run the program in incremental mode.

For example, if the collection date range includes today but does not include last year, the program will not pick up changes made today that update WMVs date-effectively last year.

- The program will only transfer corrections to WMV data (as opposed to updates, where historical data is retained) to the summary table when you run the program in full refresh mode.

Due to these constraints you should run the full refresh program weekly or monthly to ensure that the WMV history table is correct. If there are no corrections, deletions, or historical/backdated changes, (for example, if you implement WMVs by a FastFormula only, and do not directly store values for an assignment using the forms interface) running the incremental update at consecutive time periods will keep the table up to date.

The default value of this parameter is Yes the first time you run the program, and No thereafter.

- **Collect From Date / Collect To Date**

This parameter defines the start and end dates of the collection range. The program stores any WMV changes occurring (date effectively) between these dates in the WMV summary table.

This date range initially defaults to be the previous year. Thereafter the Collect From Date defaults to the last Collect To Date and the Collect To Date defaults to the current date.

- **Collect FTE (Yes / No)**

This parameter defines whether or not you wish to collect or update the WMV summary table with Full Time Equivalent values.

The default value for Collect FTE is Yes.

- **Collect Headcount (Yes/No)**

This parameter defines whether or not you wish to collect or update the WMV summary table with Headcount values.

The default value for Collect Headcount is Yes.

Run frequency

On implementation, run the concurrent request HRI Load Workforce Measurement Value History with the following parameters:

Parameter	Implementation Value
Collect From Date	The earliest date required for WMV information.
Collect To Date	The current date (default)
Full Refresh	Yes (default)
Collect FTE	Yes (if FTE is used in reporting)
Collect Headcount	Yes (if Headcount is used in reporting)

Thereafter, Oracle recommends that you run the HRI Load Workforce Measurement Value History concurrent program monthly or weekly to capture and report on workforce measurement value changes in your enterprise (see discussion on Full Refresh below).

If a system failure occurs, you must restart the program.

HRI Load All Generic Hierarchy Versions

Some US specific Discoverer workbooks use a 'Vets, EEO, AAP, OSHA, Multi Work Sites' hierarchy. They require information about the current generic hierarchy.

The concurrent program HRI Load All Generic Hierarchy Versions calculates the required data and stores it in the Generic Hierarchy Summary table ready for use by the workbooks. These workbooks will only work if you have set up these generic hierarchies and run this concurrent program.

For further information on HRMS Generic Hierarchies see EEO-1 and VETS-100 Reporting in Oracle HRMS, available on Oracle Metalink.

The HRI Load All Generic Hierarchy Versions program collects all generic hierarchies of type "Vets, EEO, AAP, OSHA, Multi Work Sites" (system code FEDREP) across all your business groups. The program stores the data in the Generic Hierarchy Summary table.

Parameters

The HRI Load All Generic Hierarchy Versions concurrent program has no parameters.

Run frequency

Run the HRI Load All Generic Hierarchy Versions concurrent program at implementation.

You must also run this process when there are changes to the generic hierarchies and you want to reflect those changes in your reports. Reports will not display accurate information if you do not run this process periodically to update the summary tables.

You should therefore run the concurrent program at regular intervals, for example, every day or every week in order to collect any changed data.

If a system failure occurs, you must restart the process.

Workforce Calculation

Workforce is one of the key areas of your enterprise you can investigate using the Workforce Intelligence reports.

Workforce is not necessarily a count of the number of employees within your enterprise. Instead, it is a count based on employee assignments and budget measurement type.

Workforce calculation always depends on a budget measurement type. When running a report you select the budget measurement type from a parameter. If you enter targets for the predefined workforce performance measures they are either based on the headcount (HEAD) or Full Time Equivalent (FTE) budget measurement type.

Some reports measure both headcount and Full Time Equivalent.

You can set budget measurement types and assignment measurement values for each employee assignment within Oracle Human Resources. When the report or performance measure runs, the workforce is calculated using this budget value.

If you have not entered a default budget measurement type and an assignment budget value, and a Business Group default does not exist, then the reports count workforce using Oracle FastFormula.

How Your Workforce is Counted

HRMSi provides two predefined formulas that reports use to calculate workforce if you do not enter assignment budget values for assignments. They are described below.

If you want to customize how workforce is counted, use Oracle FastFormula to copy and amend the predefined formulas. Reports will then use your customized version instead of the predefined formula. See: Customizing Workforce Calculations using Oracle FastFormula, page 4-16

Note: Reports only use Oracle FastFormula to calculate workforce if you do **not** have an assignment budget value entered for an assignment. Oracle recommends setting up an assignment budget value for each employee assignment.

Predefined Formulas

HRMS provides two predefined workforce formulas:

- TEMPLATE_HEAD
- TEMPLATE_FTE

The TEMPLATE_HEAD formula calculates the headcount value as follows:

If the assignment is a primary assignment, a default value of 1 is used. Otherwise, the assignment is ignored.

The TEMPLATE_FTE formula uses the employment category to calculate the Full Time Equivalent value as follows:

- If the employment category is Full Time, the value is taken as 1.
- If the employment category is Part Time, the formula uses the standard working hours for the assignment and compares them to those on either the position, organization, or business group to determine the value for the full-time equivalent.
- If the employment category is not set up, the assignment is ignored.

The TEMPLATE_FTE formula uses the predefined meanings set up for the Lookup types EMP_CAT and FREQUENCY.

The following table lists the lookup codes and meanings for EMP_CAT (Employment Category).

Lookup Codes and Meanings for EMP_CAT (Employee Category)

Lookup Code	Lookup Meaning
FR	Full-time-Regular
FT	Full-time-Temporary
PR	Part-time-Regular
PT	Part-time-Temporary

The following table lists the lookup codes and meanings for FREQUENCY.

Lookup Codes and Meanings for FREQUENCY

Lookup Code	Lookup Meaning
D	Day
HO	Hour
W	Week

If you update a lookup meaning, you must copy and amend the predefined TEMPLATE_FTE formula.

For example, the predefined TEMPLATE_FTE has the following lines, which reference two of the Lookup meanings for EMP_CAT:

```

/* If assignment is Full Time then FTE=1 */
IF hri_asg_employment_category_code = 'FR'
OR hri_asg_employment_category_code = 'FT' THEN
fte = 1

```

However, you should consider performance before customizing the TEMPLATE_HEAD formula. The TEMPLATE_HEAD FastFormula calculates the Headcount value based on whether the assignment is primary or not (1 if primary, 0 otherwise). In some cases, a report can determine this value directly, and so does not need to use the formula. This can improve report performance considerably where a large number of FastFormula calculations would be required.

This bypass is not available if you are using a customized version of the TEMPLATE_HEAD FastFormula as the logic may vary.

Configuring Workforce Calculations Using Oracle FastFormula

Typically you set up an assignment budget value for each employee assignment, and reports use this value to calculate workforce numbers. However, if you do not enter an assignment budget value for an assignment, reports use a formula to calculate workforce.

By default reports use the TEMPLATE_FTE and TEMPLATE_HEAD formulas. Copy and amend these formula templates to change the way you calculate workforce, or to report on other budget measurement types.

Important: If you copy and amend formulas, you must do so for all business groups within your enterprise. If you are using the default template formulas, this does not need to be copied to other business groups.

To configure workforce calculations:

Use the Formula window.

1. Select either the TEMPLATE_HEAD or TEMPLATE_FTE formula.
2. Click on Edit and copy the formula body.
3. Create a new formula called either BUDGET_HEAD or BUDGET_FTE, depending on which template you are copying.
4. Click on Edit and paste in the contents of the template you have copied.
5. Edit the formula code as required.

For further information on naming and amending these formulas, see: Workforce Calculation, page 4-14

6. Compile the new formula.

Repeat the above steps for each business group within your enterprise.

Entering A Conversion Rate Type

Many Workforce Intelligence reports display financial information, such as salaries. To enable the reports to convert salaries into your selected currency, you need to enter a Conversion Rate Type.

Set the Conversion Rate Type to whatever rate you have set for the profile option BIS: Primary Rate Type.

Use the Table Values window.

To enter a conversion rate type:

1. Query EXCHANGE_RATE_TYPES in the Table field.
2. Enter BIS in the Exact field.
3. Enter the conversion type you want HRMS reports to use in the Value field, such as spot type. This must match the rate used by the BIS: Primary Rate Type profile option.
4. Save the conversion rate type.

Workforce Intelligence now uses the conversion rates set up in the General Ledger Daily Rates window for the conversion rate type you have selected.

Amending the Default Training Hours

To ensure that reports and workbooks calculate the correct hours for your training events you can customize the predefined formula.

Use the Formula window.

To amend the default training hours:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.
2. Name the new formula BIS_TRAINING_CONVERT_DURATION.
If you do not name the formula correctly, the reports and workbooks cannot use it.
3. Replace the number of hours a training event runs in a day.

Example

For example, if you record the duration of a training event in days, and within your training organization a day is 10 hours:

In the predefined formula the number of hours are set as follows:

hours_per_day = 8

To set the number of hours to 10, change the code to:

hours_per_day = 10

4. Compile the new formula.

Adding Additional Training Time Periods

If you have defined your own time periods using the FREQUENCY Lookup you must copy and amend the predefined formula. If you do not add your additional time periods to the formula the hours for these events will not be included in the report and workbooks.

Use the Formula window.

To Add Training Time Periods:

1. Copy the predefined template formula TEMPLATE_BIS_TRAINING_CONVERT_DURATION.

2. Name the new formula BIS_TRAINING_CONVERT_DURATION.

If you do not name the formula correctly, reports and workbooks cannot use it.

3. Update the formula to add the code.

Example

For example, if you set up a time period called Fortnight using the Lookup code of F (Fortnight), you need to amend the formula as follows:

```
/* Main Body of Formula */
hours_per_day = 8
hours_per_week = hours_per_day * 5
hours_per_fortnight = hours_per_week * 2
hours_per_month = hours_per_week * 4.225
hours_per_year = hours_per_month * 12

/* Calculate Duration in Hours */
IF (from_duration_units = 'Y') THEN
  hours = from_duration * hours_per_year
ELSE IF (from_duration_units = 'M') THEN
  hours = from_duration * hours_per_month
ELSE IF (from_duration_units = 'F') THEN
  hours = from_duration * hours_per_fortnight
ELSE IF (from_duration_units = 'W') THEN
  hours = from_duration * hours_per_week
ELSE IF (from_duration_units = 'D') THEN
  hours = from_duration * hours_per_day
ELSE IF (from_duration_units = 'H') THEN
  hours = from_duration
ELSE
  hours = 0

/* Calculate Duration in desired units */
IF (to_duration_units = 'H') THEN
  to_duration = hours
ELSE IF (to_duration_units = 'D') THEN
  to_duration = hours / hours_per_day
ELSE IF (to_duration_units = 'W') THEN
  to_duration = hours / hours_per_week
ELSE IF (to_duration_units = 'F') THEN
  to_duration = hours / hours_per_fortnight
ELSE IF (to_duration_units = 'M') THEN
  to_duration = hours / hours_per_month
ELSE IF (to_duration_units = 'Y') THEN
  to_duration = hours / hours_per_year
ELSE
  to_duration = 0
RETURN to_duration
```

4. Compile the new formula.

Granting Business Area Access

The SYSADMIN user and users with a valid HRMS responsibility automatically have access to all HRMS Discoverer business areas.

You can grant access to specific business areas for users or responsibilities. This enables users to create or view workbooks only in the business areas they have access to.

Typically, you provide the majority of report users with read-only access to specific business areas, thereby enabling them to only view workbooks in those business areas.

1. Grant access to business areas for users or responsibilities.

For a detailed explanation of how to grant access to business areas, see: Set Privileges for the Current EUL in *Oracle Discoverer Administrator Administration Guide*.

Check the Vacancy Status Options

The vacancy reports only count vacancies as closed if they have the system vacancy status of CLOSED. However, if your system was installed prior to 11.5.9, you may have two vacancy status options that users can use to close a vacancy: Closed, and Closed (1). The Closed option has a system vacancy status of C, whereas the Closed (1) option has a system vacancy status of CLOSED.

To ensure the vacancy reports return accurate results, you need to obsolete the old vacancy status option of Closed that returns the status of C. You can also update the name of the Closed (1) option.

If you want reports to include previously closed vacancies, you may also need to update their system vacancy status from C to CLOSED.

Use the Application Utilities Lookups window.

To update the Vacancy Status Options:

1. In Enter Query mode, enter VACANCY_STATUS in the Type field, and execute a query.

Both Closed and Closed (1) may appear in the list of vacancy status options.

2. If both options appear, insert an end date of the current date against the Closed option that has a code of C.

This will remove that Closed option from the list of vacancy status options, and prevent C being used as a system vacancy status.

3. In the Meaning field, rename the Closed option to something else, for example, Closed_old.
4. In the Meaning field, rename the Closed (1) option to Closed. Ensure it has the code of CLOSED.

What's Next

If necessary, update the system vacancy status of previously closed vacancies from C to CLOSED.

Populating the Organization Hierarchy Summary Table

Reports that use organization hierarchy retrieve your organization structure from the HRI_ORG_HRCHY_SUMMARY table. Use the HRI Load All Organization Hierarchy Versions concurrent program to collect your organization hierarchy structures into the summary table. The process will perform a full refresh of all the data.

Use the Submit Requests window.

To populate the Organization Hierarchy Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Organization Hierarchy Versions and submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Organization Hierarchy Versions, page 4-9

Populating the Supervisor Hierarchy History Table

All reports that use supervisor hierarchy retrieve your current and historic supervisor hierarchy data from the Supervisor Hierarchy Summary table. Use the HRI Load All Supervisor Hierarchies concurrent program to collect your organization hierarchy structures into the summary table.

Use the Submit Requests window.

To populate the Supervisor Hierarchy History table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Supervisor Hierarchies.
3. At implementation, set Full Refresh to Yes in the Parameters window.
4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load All Supervisor Hierarchies, page 4-10

Populating the Workforce Measurement Value History Table

Many reports use Workforce Measurement Values (WMVs), for example, Workforce Losses, Workforce Gains, and Workforce Count. WMVs include headcount and full-time equivalent (FTE) assignment budget values.

Populate the Workforce Measurement Value History table with the WMVs used by your reports. To populate the table, you need to run the concurrent program HRI Load Workforce Measurement Value History.

Use the Submit Requests window.

To populate the Workforce Measurement Value History table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load Workforce Measurement Value History.
3. At implementation, use the following parameter values:

Parameter	Implementation Value
Collect From Date	The earliest date required for WMV information.
Collect To Date	The current date (default)
Full Refresh	Yes
Collect FTE	Yes (if FTE is used in reporting)
Collect Headcount	Yes (if Headcount is used in reporting)

4. Submit your request.

What's Next

Define when you want to run this process using the schedule options.

For full information on this concurrent program, see HRI Load Workforce Measurement Value History, page 4-11

Populating the Generic Hierarchy Summary Table

Some US specific Discoverer workbooks use a 'Vets, EEO, AAP, OSHA, Multi Work Sites' hierarchy. They require information about the current generic hierarchy.

Run the concurrent program HRI Load All Generic Hierarchy Versions to calculate the required data and store it in the Generic Hierarchy Summary table ready for use by the workbooks. These workbooks will only work if you have set up these generic hierarchies and run this concurrent program.

Use the Submit Requests window.

To populate the Generic Hierarchy Summary table:

1. Select Single Request in the Submit a New Request window.
2. In the Name field, select HRI Load All Generic Hierarchy Versions.
3. Submit your request.

What's Next

For a full discussion of the HRI Load All Generic Hierarchy Versions concurrent program, see HRI Load All Generic Hierarchy Versions, page 4-13

Collecting Organization Hierarchy Structures

The BIS Load Organization Hierarchy Summary Table concurrent program creates the organization hierarchies on which the Discoverer End User Layer folder Organization Rollup – Current is based. If you create any reports based on the Organization Rollup – Current folder, you need to run this program to collect organization hierarchy structures into the HRI_ORG_PARAMS and HRI_ORG_PARAM_LIST tables.

1. **Define Primary Organization Hierarchy**

Prior to running the concurrent program, ensure you have at least one organization hierarchy marked as the primary hierarchy. If no hierarchy is nominated as the primary hierarchy, BIS Load Organization Hierarchy Summary Table will not pick up your hierarchies.

See: Creating Organization Hierarchies, *Enterprise and Workforce Management Guide*

2. **Add BIS Load Organization Hierarchy Summary Table to a Request Group**

Add the BIS Load Organization Hierarchy Summary Table concurrent program to a request group.

See: Adding BIS Load Organization Hierarchy Summary Table to a Request Group, page 4-22

3. **Populate the Organization Hierarchy**

Schedule and run your request set that contains the BIS Load Organization Hierarchy Summary Table concurrent program using the Submit Request Set window.

See: Populating the Organization Hierarchy Tables, page 4-22

Adding BIS Load Organization Hierarchy Summary Table to a Request Group

If you have created reports based on the Organization Rollup – Current folder in the Discoverer End User Layer, you must run the BIS Load Organization Hierarchy Summary Table concurrent program to populate organization hierarchy summary tables.

See: Populate the Organization Hierarchy Tables, page 4-22

Prior to running this program you must add it to a request group. The request group should be used by the responsibility that runs the concurrent program.

Use the Request Groups window.

To add BIS Load Organization Hierarchy Summary Table to a request group:

1. Enter the name of the group to which you want to add the program.
2. Enter Oracle Human Resources in the Application field.
3. Select Program as the Request Type.
4. In the Name field, select BIS Load Organization Hierarchy Summary Table
5. Save the change to the request group.

Populating the Organization Hierarchy Tables

If you have created reports based on the Organization Rollup – Current folder in the Discoverer End User Layer, you must populate organization hierarchy summary

tables. Use the BIS Load Organization Hierarchy Summary Table concurrent program to populate the tables.

Prior to running the concurrent program, ensure you have at least one hierarchy marked as the primary hierarchy. See: *Creating Organization Hierarchies, Oracle HRMS Enterprise and Workforce Management Guide*

Prior to running this program you must also add it to a request group. See: *Adding BIS Load Organization Hierarchy Summary Table to a Request Group, page 4-22*

Use the Submit Request Set window.

To populate the Organization Hierarchy tables:

1. Select Request Set in the Submit a New Request window.
2. In the Request Set field, select the name of your request set that includes BIS Load Organization Hierarchy Summary Table and submit your request.

What's Next

Define when you want to run this request set using the schedule options.

For further information on the BIS Load Organization Hierarchy Summary Table concurrent program, see *BIS Load Organization Hierarchy Summary Table, page 4-9*

Using Attachments

You can attach short comments, word processed documents, images, video, OLE objects, or Web pages to many records in Oracle HRMS. For example, you could attach a resume to an applicant record and a position description to a position record.

Each record can have one or more attachments, and you can copy attachments from one record to another. You can store the attachments in the database or in your file system.

To view attachments or add new attachments:

Click the Attachments icon. By default, clicking the attachments icon displays a Comments window where you can enter text up to 2000 characters. This is the Comments facility available in earlier releases of Oracle HRMS. If you want to replace this facility with the ability to attach multiple items, ask your system administrator to set your user profile option HR:Use Standard Attachments to Yes.

The HRMS entities that support attachments are:

- Absence
- Absence Type
- Address
- Application
- Assignment
- Balance (Oracle Payroll)
- Batch Header
- Booking
- Budgets

- Budget Version
- Calendar
- Career Path
- Collective Agreements
- Consolidation Set (Oracle Payroll)
- Contact Relationship
- Contracts
- Customization
- Element
- Element Entry
- Element Link
- Element Set
- Event
- Grade
- Grade Rate
- Job
- Job Evaluation
- Job Requirement
- Letter Type
- Monetary Unit (Oracle Payroll)
- Organization
- Organization Payment Method
- Organization Hierarchy
- Pay Scale
- Payroll Process (Oracle Payroll)
- Period of Service
- Person
- Person Analysis/Special Information
- Personal Payment Method
- Position
- Position Hierarchy
- Recruitment Activity
- Requisition
- Salary Basis
- Salary Proposal

- Salary Proposal Component
- Secondary Assignment Status
- Special Information Type
- Status Processing Rules (Oracle Payroll)
- Vacancy
- Valid Grade

Using Inquiry Windows and Folders

You can define public folders, which all users can view, as well as private folders for your own use.

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

Inquiry Windows in Oracle HRMS

Inquiry Window	Information Provided
Assignments Folder	Lists of assignments in a folder
Employee Assignment Processes (Oracle Payroll - UK and US legislations only)	All the assignment processes for one employee assignment, which you can view, retry or roll back, with further information on run messages, run results, balances, payment details and costing
Payroll Processes (Oracle Payroll - UK and US legislations only)	All the payroll processes for one payroll for a specified period, which you can view, retry or roll back, with further details on assignment processes, run messages and costing
People Folder	Lists of people in a folder
Salary Management Folder	List of assignments with their current approved salary and proposed new salary
Position Occupancy Folder	Lists of people who have held a selected position, or are applying for it, and the dates of their occupancy
List Assignments	Assignments that match the assignment components you specify for current applicants, employees, or both
List People by Assignment	People whose assignments match the assignment components you specify for current or former applicants, employees, or both
List Employees by Organization	All employees assigned to one organization and, optionally, to all organizations below it in a specified hierarchy

Inquiry Window	Information Provided
Assignment History	The dates of assignments and periods of service for an employee who has had more than one assignment.. NOTE: use DateTrack History on the Assignment window to see historical changes to one assignment
List Employees by Position	All employees assigned to a specified position or organization and job
List Employees by Position Hierarchy	Current holders of positions at and below a specified position in a position hierarchy
View Employee Grade Comparatio	The amount employees receive for a specified element as a percentage of the mid-value of their grade rate range
List Employees by Absence Type	All absences of a particular absence type or category within, optionally, a specified time period
View Employee Absence History	Periods of absence for a specified employee
List People by Special Information	All people for whom you have entered details about a specified special information type
List Employees by Element	All employee assignments receiving a specified compensation element within a given time period
View Element Entry History for Employee	The history of entries of one or more elements for an employee assignment
List Position Budget Variance	Variances between the number of actual position holders and the values entered in a specified budget for positions below a chosen position in a hierarchy
List Budget Variance by Organization	Variances between the number of actual position holders and the values entered in a specified budget for all positions in organizations at and below a chosen organization in a hierarchy
View Employee Benefits (US only)	View benefit plans on which an employee is enrolled and the coverage level and contributions for each plan
View Vacancies	Vacancies matching assignment components and other criteria you select

Running Predefined and User Defined Reports

1. Reports originating from SQL*Plus or Oracle Reports run in batch mode. You submit them for processing in the Submit Requests window, and you can view their progress using the Requests window. The requests are handled by a *concurrent manager* so you can continue working online while your request is processed.

See: Submitting a Request, *Oracle Applications User's Guide*

2. You can schedule the reports to run regularly and you can group them with other reports and processes to run as a set. You can also control access to the reports and control their printing. For example, the system administrator may want to ensure that users in one location always print their reports on a local printer.

See: Reports and Processes in Oracle HRMS, page B-1 for a list of predefined reports and processes.

You can create your own reports using Oracle Reports or SQL*Plus or another tool of your choice. You can register them with Application Object Library. This means you can run them from the standard Submit Requests window, and you can schedule them in report sets with other reports and processes.

Defining QuickPaint Reports

You can design QuickPaint reports in the Define QuickPaint Report window.

In the Report Definition area, you can enter *free text* to introduce the report and to label the information that the report extracts from the database. You can also select *database items*, which are tags representing the information to be extracted from the database. When you run the report, the database item names are replaced by the appropriate data for the assignment or set of assignments for which the report is run.

You must be careful how you position the database items so that QuickPaint interprets them correctly and formats the report in the layout you require.

To define a QuickPaint Report:

1. Enter a name, and optionally a description, of the report.
The Protected field is display only; some reports provided by localization teams are protected against edits.
2. In the Report Definition area, enter free text exactly as you want it to appear on the report.
3. To select database items, choose the Show Items button and run a query to display a list of database items, then select and copy items to the Report Definition area.
Notice that the database item name must begin with an ampersand (&). Names without an ampersand are treated as free text.
4. Save the report definition.

Positioning Items

If you want to add free text immediately after a database item, you must separate it from the database item with at least one space. Otherwise QuickPaint reads the database item as free text.

Both free text and database items appear in the report results on the line on which you painted them in the Report Definition area. They also generally appear in the column in

which you painted them. However, it might be that the data replacing a database item name is long enough to push later items on the same line to the right.

For example, if you paint database items and free text like this:

```
&ASG_JOB          in &ASG_ORG
```

the report results print like this:

```
Technician      in Biochemistry
```

```
Scientific Officer in Biochemistry
```

Notice that, in the second result, the free text 'in' is pushed to the right and one space is entered before it.

If you know the number of the column in which you want text or a database item to appear, you can enter it like this:

```
&ASG_JOB          &32in &ASG_ORG
```

However, the text 'in' will still be pushed to the right if the preceding database item (&ASG_JOB) extends beyond column 32. If you would prefer the preceding database item to be truncated, paint the line as follows:

```
&ASG_JOB          &&32in &ASG_ORG
```

The report results will look like this:

```
Technician      in Biochemistry
```

```
Scientific Off in Biochemistry
```

If you want one space between two database items or between a database item and text, then paint them separated by a single space. The single space is always preserved. For example, this definition:

```
&EMP_FIRST_NAME &EMP_LAST_NAME
```

gives the following report results:

```
Alice Hollister
```

```
Ray Garcia
```

Adding Conditions or Calculations to QuickPaint Reports

When you save a report definition, QuickPaint generates a formula to extract the information required by the report. You can view this formula in the Formulas window. To query the formula, enter the name of your QuickPaint report.

Formulas generated from QuickPaint definitions do not contain conditional logic or mathematical computations. If you need these features, query the formula in the Formulas window and copy it. Edit the copy to add the logic you require.

Important: You should not edit the original QuickPaint formula. Always edit a copy. Any edits of the original formula are overwritten if you change the report definition in the QuickPaint Report window.

Running QuickPaint Reports

You run QuickPaint reports from the Run QuickPaint Report window. You can run a report for one assignment or for a group of assignments.

To run a report for one assignment:

1. Select the type Assignment.
2. In the Assignment region, select the assignment for which you want to run the report.
3. In the Report field, select the report you want to run.
4. Choose the Run Report button.

The message line tells you when the report is complete.

5. Choose the View Report button to see the report results.

When you run a QuickPaint report, the system runs the formula associated with the report. The first time you run a report, the system may take several seconds to identify all of the related data and bring it back to the screen. All subsequent inquiries for other employees or applicants will run very quickly.

To run a report for an assignment set:

1. Select the type Assignment Set.
2. In the Assignment Set region, select the assignment set for which you want to run the report.
3. In the Report field, select the report you want to run.
4. Choose the Run Report button.

The message line tells you when the report is complete.

5. Choose the View Report button to see the report results.

Defining Concurrent Process Custom Reports

The Custom Reports function provides a generic reporting capability that makes use of a single report to print out a custom definition. This report is called PERGENRP.

The report is registered as a concurrent process and prints, in landscape format, the contents of the temporary table PER_GENERIC_OUTPUT_REPORT.

This table contains the individual components of a custom report and is populated by the PL/SQL package PERGENRP.pkb, stored in \$PER_TOP/admin/sql. This package is executed when you select the Generate Report button on the Custom Reports window.

To submit a Custom Report:

1. Navigate to the Custom Reports window.
2. Select the report by name.
3. Enter any parameters for this report.

Important: Parameter values are not validated until you choose the Generate Report button.

4. Choose the Generate Report button

The default for the report is to print the output automatically. It is a System Administrator task to set default printers for all users, or to reset this option on the Concurrent Program window.

Creating New Report Formats

A special feature of Custom Reports is that you do not need to create multiple reports. You modify the generic package (PERGENRP.pkb) and report to provide additional formats and parameters.

Three sample report formats are provided, each with a different set of parameters:

- PERCS001 - Custom Report 1

There is one parameter: Vacancy. The format in PERGENRP is *Full Name of Applicant* and *Gender*.

- PERCS002 - Custom Report 2

Parameters are Vacancy and Gender. The format in PERGENRP is *Full Name of Applicant* in uppercase.

- PERCS003 Custom Report 3

Parameters are Vacancy, Gender and Marital Status. The format in PERGENRP is *Full Name of Applicant*, *Gender* and then *Full Name* in uppercase.

You can edit the generic package to change:

- Report Title Page
- Header
- Footer
- Body Text

After you have modified the package, you need to register a new custom report, with the parameter set for that report. This is a task for the System Administrator.

To register a new Custom Report with parameters:

1. Navigate to the Concurrent Programs window.
2. Enter the name of the Custom Report as the Program.
3. Enter a short name for the Custom Report.

Important: You must start the short name with PERCS. This will limit the list of values available to users in the Custom Report window.

Interface Configuration

Interface Configuration Overview

Oracle HRMS provides functionality that enables you to enter and update large groups of element entries, to extract records from the HRMS tables to send to third parties, and to upload legacy data and information supplied by third parties into the HRMS tables.

You can use BEE (Batch Element Entry) to enter or update a batch of element entries for many employees, using defaults for fast entry. For example, to ensure that the data entry process is fast and that the data entered is accurate, you can use BEE to enter timecard data needed for regular pay processing,

See: Batch Element Entry, page 5-24

System Extract lets you manage the formatting, extraction, and delivery of HRMS data to benefits carriers, payroll providers, and other third-party vendors. For example, you can use System Extract to extract records for benefits plans into an extract file that you then transmit to a third-party benefits carrier.

See: Benefits System Extract, page 5-3

The Oracle HRMS Data Pump loads legacy data into the Oracle HRMS tables using a set of predefined batch tables and standard processes that simplify the tasks of data-loading using supported APIs.

You map the data items from your external system to the parameter values of the appropriate APIs, load your data into a single generic batch lines table, and then run a process that automatically calls the appropriate API for each line of data in the batch table.

See: Data Pump, *Oracle HRMS Data Pump (Technical Essay)*

Oracle Generic Third Party Backfeed enables you to upload information supplied by a third-party payroll system into the Oracle HRMS tables. For example, you can load payment information and balance details calculated by a third-party payroll system and then view this information using Oracle HRMS windows and generate reports based on this information.

Backfeed holds the uploaded data in Backfeed tables that are independent of Oracle Payroll.

See: Payroll Backfeed, *Oracle Generic Third Party Payroll Backfeed (Technical Essay)*

Interface Configuration

Can you enter weekly timecard data?

Yes, using Batch Element Entry, you can enter timecard information for a group of employees, using default values as appropriate. You can validate your entries against system rules and external control totals before uploading it to the database in time for the payroll run.

I'm entering compensation details for analysis but not for payroll processing. How do you reduce data entry work to a minimum?

If the same compensation entry applies to a group of employees, the system can enter it automatically. You need to set up the element with *standard links*. Use Batch Element Entry to start or update other entries in batches.

You can download salary information to a spreadsheet, update it there, and upload the new information to the database.

Can you migrate legacy data in Oracle HRMS?

Yes. You can use the Data Pump to update and load legacy data into the Oracle HRMS tables. You load data from an existing HRMS system into a single batch interface table using a set of supplied PL/SQL interface routines that map the data against the appropriate API. The data pump engine then uploads the data into the Oracle HRMS system.

Does Oracle HRMS provide an open interface with third-party systems?

Yes. The Oracle HRMS Data Pump provides data transformation, validation and adapters for connectivity to third-party systems.

Benefit Reporting and System Extract

Reporting Groups

A reporting group is a collection of programs and plans that you group together for reporting purposes, such as for administrative use or to meet regulatory requirements.

At the plan level, you can define the regulatory bodies and regulations that govern a reporting group.

For each regulatory body that you link to a plan, you can define how the regulatory body governs that plan. You can also record the date the plan was qualified by the regulatory body and the approved termination date if the regulatory body does not recognize a plan's qualifications after a certain date. An approved termination date is typically defined when a reporting group must be re-evaluated by the regulatory body on a periodic basis.

Since US benefit plans are subject to federal nondiscrimination testing requirements, you may define special FastFormula rules to help determine compliance with these regulations. You can define the following rules:

Contribution Nondiscrimination is used to identify those participants who cause the plan to be out of compliance with contribution nondiscrimination provisions.

Coverage Nondiscrimination is used to identify those participants who cause the plan to be out of compliance with coverage nondiscrimination provisions.

Five Percent Owner is used to determine those participants who are 5% owners of the business.

Highly Compensated Determination is used to determine those participants who are highly compensated in the context of the plan for nondiscrimination testing purposes.

Key Employee Determination is used to determine those participants who are key in the context of the plan for nondiscrimination testing purposes.

Benefits System Extract

Many human resource departments outsource at least some of their compensation and benefits administration processing to third party carriers, payroll providers, or other vendors. Thus, there is a great need for reliable data exchange between plan sponsors and these third parties.

You can use System Extract to extract records for a variety of plans, including compensation and benefits plans and absence plans. Additionally, you can use this feature to extract other data, such as people and assignment information.

In order to extract records from the database for transmission to a third party, you must define the *criteria* that determine which records are extracted. You also must define the *layout* of the extracted records including the data elements that comprise the extract, the date range of the records you are selecting, and the output directory and file name of the extract file.

After you create your extract definition, you run the system extract batch process to create your extract results using the Concurrent Manager. You can then review these results, including any errors that occurred during the batch process. When you are

satisfied with the results of the extract, you can transfer the extract file onto the delivery medium by which you transmit or store the extract results.

You can think of the system extract process as consisting of these steps:

- Defining an Extract Layout
- Defining an Extract Criteria Profile
- Defining a System Extract
- Running the System Extract Batch Process
- Viewing Extract Results
- Running the extract write process

Extract Layout

You create an *extract layout definition* to control the data elements that are included in the extract and the format of the extract results.

An extract layout consists of data elements and their formatting, record layouts that define which data elements appear in the header, detail, and trailer areas of the extract, and a file layout that specifies the order of the records.

Your extract layout also indicates the sort order of the records and any conditional record inclusion criteria that you define.

For example, you could create an extract layout definition for the enrollment results of the medical plans offered by your organization. You define data elements such as the participant's first name, middle name, last name, and the plan they elected. Then, in your record layout, you order these data elements into their correct sequence. Lastly, you create a file layout by ordering the various record layouts you have defined into their appropriate sequence.

Data Elements

Data elements are individual data components which contain values that you include in an extract. Different *data element types* can contain different values. You use your data element definitions in conjunction with your extract criteria definitions to restrict the data that is included in the extract.

Field data elements are most often data extracted from a database field, but can also include common header and trailer totals, dates, and other filler information. You cannot update the list of fields delivered with the system.

You use **decoded field** data elements when you want to display a different value in the extract than is stored in the database. For example, if you store the values for Male and Female as 1 and 2 in your database, you can decode this data for your extract so that the values appear as Male and Female in the extract.

Select the **Record Calculation** type to calculate the total of two or more data elements in a record. You can add, subtract, multiply, or divide extracted data.

You enter a **string** as a character literal that you want to include in an extract. For example, you may include a string that is the record type that precedes each record in the extract file.

You can define a **rule** if you want to create a data element that is not included in the standard list of data elements.

You select the **totals** data element type for use in the header or trailer of a record. Using totals, you can sum the results of any data element or include a count of the number of records. You can also conditionalize your totals so that you only display the sum of data elements where the value is equal to the value that you specify.

Special Formatting for Data Elements

You can format different data element types in different ways. For the data element type of field, rule, or totals, you can select the **justification** as either right or left justified.

Note: The default justification is left justified. For data elements with a number value, you typically select right justified.

You can select **format masks** for the data elements types of field, decoded field, record calculation, rule, and totals. Format masks can be used for numbers, dates, phone numbers, and social security numbers. For example, you can select a date format mask of DD/MM/YYYY. For the field data element type, you can also set the capitalization of all extracted records to Uppercase, Lowercase, or Initial Capitals.

If the seeded format masks are insufficient, you can add format masks to the system's number and date lookups. You use a lookup code that begins with 'N' for numeric format masks or 'D' for date format masks. You cannot define your own format mask for phone numbers or social security numbers.

Note: A system administrator familiar with Oracle formats should enter this information.

You define the **maximum length** of a data element value to control the point at which the value is truncated. For example, you could specify a maximum length of *one* for the middle name data element to retrieve a person's middle initial. The maximum length does not control the starting position of the following field.

For a data element with a value of *null*, you can specify a **when null use** value as the default value. If you do not specify a when null use value then null values appear as a blank in a fixed column layout or as no value in a variable layout.

For the decoded field data element type only, you can define an **others value** to use as the default value for undefined and null values. For example, you could decode the value of 'M' and 'S' to mean married and single. For all other values, you could define an *others value* of null.

Record Layout

You specify the data elements that are included in the header, detail, and trailer portions of your record layout. Typically, the header and trailer portions of a record contain *control* information, such as file identifying information, dates, and totals. Detail records contain the content and values of an extract.

You can specify if a data element is required for the extract. If a required data element is missing, the entire record is written to the error log during the extract process and no extract result is created for that record.

You can also choose to *hide* a data element from an extract record when you run the write process. Hidden data elements appear in the extract result after you run the extract process, but are hidden when you initiate the extract write process.

Extract Record Hierarchy

Levels Branches and Planes

The data elements that you can include in an extract record are controlled by the system extract hierarchy of **levels, branches, and planes**.

A **level** is a logical grouping of data elements. For example, the Person Level contains data elements such as person first name and person address. The **lowest level** in the extract hierarchy determines the number of times that a record repeats.

For an extract record that contains data elements from the person level and the enrollment level, the record repeats at the enrollment level. If a person enrolls in a medical plan and a dental plan, the record repeats for each enrollment.

A **plane** is a grouping of levels. There are three planes in the system extract hierarchy that you use to control data element sorting. The sorting definitions that you apply to an extract are limited to the data elements contained in the level for that plane.

The **branches** of the extract hierarchy link levels from the three planes. There are six branches:

- Person, Eligibility
- Person, Enrollment, Beneficiary
- Person, Enrollment, Dependent
- Person, Enrollment, Action Item
- Person, Element Entry
- Person, Run Result

You can only define a record with data elements from levels in the same branch. You cannot define a record using data elements from more than one level of the same plane.

File Layout

You define a file layout to create the sequence (from right to left) in which the records display in an extract. Sequence numbers are unique. They must start with 1 and be between 1 and 75. It is recommended that you do not leave any gaps in your record sequence.

Data Element Sorting

You can **sort** the data elements in a record by up to four levels based on any data element you include in the extract. Sorting can occur on each record in a file layout.

For extracts with multiple records, the sorting criteria defined for the record with the highest sequence number are inherited by records with lower sequence numbers unless you define a separate sort order for a record with a lower sequence number.

You use record sequence numbers to order records within one level in the extract hierarchy. System edits ensure that record sort orders conform to the plane structure of

the extract hierarchy. For example, you cannot define an extract to include data elements from the eligibility level between the enrollment level and the dependent level.

Extract Criteria

The extract criteria you select determine the data that is extracted by filtering the data. Data that does not meet your extract criteria is not extracted. You can select from several groupings of criteria that you combine to create an *extract criteria profile*. These criteria groupings include:

- People
- Benefits
- Changes
- Payroll
- Communications
- Advanced

People

You select People criteria to limit your extract results to people who meet the criteria you select, such as assignment location, organization, or benefits group. You can also select individual people.

Benefits

You use Benefits criteria to limit your extract results to a particular plan or reporting group. In addition, you use this criteria to define the extract processing for dependents of primary participants.

Changes

Often in the outsourcing process, data transmissions need only record data that has changed since the last transmission. This helps reduce the cost and complexity of an extract by eliminating the reporting of unnecessary information. You can track these changes for particular change events defined by the system.

Payroll

This criteria grouping is for customers who do not use Oracle Payroll. You can limit the type of element entries and input values that are extracted.

Communications

This limits the communication types that are extracted.

Premium

If you extract data for transfer to a third party administrator or benefits provider, you can create an extract criteria profile that includes premium criteria.

You can extract premiums for a single month or for a range of dates. Additionally, you can restrict a premium extract to the last occurrence of a record update.

Advanced

Use the Advanced criteria to create an extract for a change event when you have complex criteria for selecting records.

You can select records for a change event over one or more periods of time, and you can select record by the actual date or effective date of change.

Note: This feature is available to both Standard and Advanced customers.

Extract Definition

You create an extract definition to set parameters specific to a particular extract by selecting the criteria profile and the layout that you want to use for the extract.

You also define parameters for the system extract batch process that you run to create the extract result. These parameters include the extract date range, the data sort order, and the output directory and file name.

Extract Batch Processes

You run the **Extract Process** from the Concurrent Manager to create results for an extract definition that you have defined. After you run the extract process, you can view the results in the Extract Results window. The extract process generates a summary report and an error report. You can run the **Extract Audit Report** to view a limited selection of records from the extract results.

You run the **Extract Layout Report** to extract just your layout definition with no data. This is useful for reviewing the format of the layout. Benefit carriers may also find this information useful in helping them import the extract result into their systems.

Use the **Extract Results Data Purge** process to remove unwanted data from the extract results tables. Purging unneeded data helps save table and disk space.

Extract Results

You run the **Extract Summary** report from the Concurrent Manager to view an extract summary. You can view any errors that occurred during the extract process by running the **Extract Error Report**.

To view detailed information about an extract, you use the Extract Results form.

Change Event Log

You can view the change events for a person using the Change Event Log window. The window displays the name of the change event, the date on which it occurred, and the user name of the person who entered the change.

You can delete change events from this window, but you cannot add change events.

Extract Write Process

Once you are satisfied with the results of your extract, you run the **Extract Write Process** from the Concurrent Manager to save the output of the extract to the directory and file you specified in your extract definition.

Update the user profile option BEN: Max Extract Line Size to set the maximum length of a record generated by the Extract Write Process.

See: User Profiles, page 1-46

See: Running the System Extract Batch Processes, page 5-20

System Extract Copy

You can copy a system extract to another business group or database instance. To save time during implementation, build a system extract once, then copy the data elements, record and file layouts, and extract criteria that comprise the extract definition.

Run the Extract Definition Download to Data File process from the source business group to copy the extract definition. Then, run the Extract Definition Upload from Data File process from the target business group to import the copied extract definition.

See: Copying a System Extract, page 5-22

XML-Enabled System Extracts

You can use System Extract to generate an XML file for data transfer. Unlike ASCII files that rely on character ordering and spacing, XML files use tags to identify data types.

When you define the Extract Definition, you can create either a TXT or an XML formatted file. If you select XML, the Extract Process generates the following files:

- XML file
- XSL file (style sheet)
- XSD file (schema)

The XML file contains the data along with the XML tags. The recipient of the extract--such as a benefits provider--uses the XSL file to determine the layout of the XML file. The XSD file allows you to view the XML file in a web browser.

Each tab in the Extract Layout and Extract Definition forms contains a field called XML Tag. The XML tag defaults to the name you assign each record. You can change the name of the XML tag at anytime prior to running the Extract Process. A tag can contain up to 80 characters and does not allow spaces, numbers, or special characters.

Tag names do not need to be unique. If you extract XML for an existing extract that has no tags defined, the Extract Process uses the lookup codes contained in the BEN_EXT_XML_TAGS Lookup Type to populate the tags in the extract results.

Defining a Reporting Group

You use the Reporting Groups window to define a reporting group and to associate programs and plans with the reporting group. You can also define which regulatory bodies and regulations govern the reporting group.

To define a reporting group:

1. Enter a unique Name for the reporting group.
2. Select the Global check box to include plans in the reporting group from any business group.

Note: Create a global reporting group if you implement a Compensation Workbench plan and you enable a manager to review or allocate compensation for employees in different business groups.

3. Select the Purpose of the reports that will be generated for this reporting group.
Select a purpose of Compensation Plan Groupings for Compensation Workbench.
4. Enter a Description of the reporting group.
5. Select the first Program Name if the reporting group is to consist of one or more programs.

Alternatively, select the first Plan Name in the reporting group.

Any row (record) in this table can include a Program Name or a Plan Name, but not both simultaneously. While it is unlikely that you would want to use the same reporting group to report at the program and plan levels, you could do so by choosing a Program Name for one record, and then choosing a Plan Name for each subsequent record in the reporting group.

Note: When a plan is selected, the Regulatory Bodies and Regulations button is enabled, indicating that you can define regulatory bodies for, and associate regulations with, that plan.

6. Save your work.

Defining Regulatory Bodies for a Plan

You use the Regulatory Bodies and Regulations window to date effectively define the regulatory bodies that approve or govern this plan.

To define a regulatory body for a plan:

1. Choose the Plan Regulatory Bodies tab if it is not already selected.
2. Enter the Name of the regulatory body associated with this plan.
In the Dates block:
3. Enter the Approved Termination date on which this regulatory body ceases to recognize this plan's validity.
4. Enter the date this regulatory body qualified this plan in the Qualified field.
5. Select one or more Regulatory Purpose Codes that describe how this regulatory body governs this plan.
6. Save your work.

Defining Regulations for a Plan

You use the Regulatory Bodies and Regulations window to date effectively define the regulations that approve or govern this plan.

To associate regulations with a plan:

1. Choose the Plan Regulations tab if it is not already selected.

2. Select a Regulatory Plan Type.
3. Select the name of the regulation that governs this plan in the Regulation field.
4. Select one or more rules to determine how plan regulations define:
 - Contribution Nondiscrimination
 - Coverage Nondiscrimination
 - Five Percent Owner
 - Highly Compensated Determination
 - Key Employee Determination

Note: These rules reflect US non-discrimination legislation.

5. Save your work.

Defining an Extract Criteria Profile

You use the Criteria Definition window to create an *extract criteria profile* that limits the results of a system extract to records that match your extract criteria.

To define an extract criteria profile:

1. Enter an extract criteria Profile Name or query an existing profile that you want to modify.
2. Choose a tabbed region that represents a criteria category you want to include in your profile. Choose from:
 - People
 - Benefits
 - Changes
 - Payroll
 - Communications
 - Premium
 - Advanced

Note: If you define an extract criteria profile that uses change events, you must enable these change events in the Application Utilities Lookups window. Query the Lookup code BEN_EXT_CHG_EVT and select Enable for each change event you want to enable.

3. Select a Criteria Type that limits the records to include in this extract.
4. Select a criteria value based on the criteria type you selected.
5. Check the Exclude field if this criteria type and value is excluded from appearing in your extract.
6. Repeat steps 2-5, page 5-11 for each criteria that you are including in this extract criteria profile.

7. Save your work.

To define an extra criteria profile using Advanced criteria:

1. Enter or query an extract profile in the Profile Name field.
2. Select the criteria types and values that you want to include in this extract criteria profile.

Note: If you are defining a profile using change event criteria from the Advanced tabbed region, do not select any change events in the Change tabbed region.

3. Choose the Advanced tab.
4. Select the Criteria Type of Combination.
5. Navigate to the Advanced Criteria window by clicking into a Value row and choosing the Details button.
6. Select a Criteria Type. Choose from:
 - Change Actual Date
 - Change Effective Date
 - Change Event
7. Select an Operator to limit the criteria values.

Note: For change dates, select either equals (=) or between as the operator. For change events, select either equals (=) or does not equal (!=).

8. Select a change value in the Value 1 field.

Note: For change dates, select a value that specifies a period of time, such as Last Day of Previous Month. For change events, select a particular change event.

9. Select another value in the Value 2 field if you are adding more criteria values to this extract profile or if you are comparing values in the Value 1 and Value 2 fields.
10. Save your work.

Defining an Extract Layout

You use the Layout Definition window to define the data elements, records, and format of the records that are extracted by your extract definition.

Your *extract layout definition* consists of the data elements to include in the extract, the record layout that controls the records that appear in the header, footer, and detail areas of your extract, and the file layout that defines the records to include in the extract.

See: Extract Layout, page 5-4

Data Elements

You use the Data Elements tabbed region to select the data elements to include in an extract and to define the layout format of each data element.

To define the layout format of a data element:

1. Enter the Name of the data element you are defining.
2. Select the data Type of the data element.
Note: Depending on the data type you select, the system presents different formatting options for that data element.
3. Enter an XML tag name if you output the system extract file in XML format.
Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.
4. Enter values for the following parameters if you select the **Field** data element type:
 - Select the Field.
 - Select a Format Mask that formats the results of the value from the field. For example, you can set the capitalization of all extracted records to Uppercase, Lowercase, or Initial Capitals.
 - Select the Justification, either left or right.
 - Enter a value or character string to use when the value for the data element is null in the When Null Use field.
 - Enter the maximum number of characters to include in this data element in the Max Length field.
5. Enter values for the following parameters if you select the **Decoded Field** data element type:
 - Select the Field.
 - Select a value in the If Value Is field that, when met, requires a substitute value.
 - Enter the substitute value in the Replace With field.
 - Enter a value in the Other Values field to use when the decoded value is either null or undefined.
6. Enter values for the following parameters if you select the **Record Calculation** data element type. As a prerequisite, you must first define the corresponding record layout and the elements in the record layout.
 - Select a calculation Function, such as Add.
 - Select the Record Name of the layout in which you are including the calculated data element.
 - Select the Format Mask.
 - Select the Justification, either left or right.
 - Enter a Sequence number for the first data element in the calculation.

- Select the first Data Element Name in the calculation.
 - Select the remaining data elements in the calculation, entering a sequence number for each element.
7. Enter a character string in the Value field if you select the **string** data element type.
 8. Enter values for the following parameters if you select the **Total** data element type:
 - Select the totaling function, either count or sum.
 - Select a data element.
 - Select the Format Mask.
 - Select the Justification, either left or right.
 9. Select a **Rule** to define a data element if the standard data element types do not meet your criteria.
 10. Save your work.

Record layout

You use the Record Layout tabbed region to define the header, detail, and trailer portions of your data extract.

To define the record layout of a system extract:

1. Enter a Name for the record layout definition.
2. Select the record layout Type, choose either Header, Detail, or Footer.
 The Repeating Level field is populated based on the lowest level in the extract hierarchy from which data elements are selected for this record. This is a read-only field.
3. Enter an XML tag name if you output the system extract file in XML format.
Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.
4. Enter the Seq (sequence) number in which this data element displays in the extract report.
Note: Sequence numbers must be unique. They must start at 1 and be between 1 and 75. It is recommended that you do not leave any gaps in your record sequence.
5. Select a data element in the Data Element Name field.
6. Enter a Start Position number for this record if you are defining a fixed layout format.
7. Enter a Delimiter (such as an asterisk or a comma) that separates the fields of this data element if you are defining a variable layout format.
8. Check the Required field if this data element must be included in the extract record.
 If you check the Required field, you may want to enter a value to display when this field is null. You enter this value by selecting the field name in the Data Elements tabbed region and entering a value in the When Null Use field.

Note: If a required data element is missing, the entire record is written to the error log during the extract process and no extract result is created for that record.

9. Check the Hide field if you want to hide a data element from an extract record when you run the write process.

Note: Hidden data elements appear in the extract result after you run the extract process, but are hidden when you initiate the extract write process.

10. Save your work.

File layout

You use the File Layout tabbed region to define the sequence in which the records in this extract display and any conditions that must exist for a record to be included in the extract.

To define the file layout of a system extract:

1. Enter a Name for the file layout definition.
2. Enter an XML tag name if you output the system extract file in XML format.

Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.

3. Enter the Seq (sequence) number in which the extracted records display.
4. Select a record that you have defined in the Record Name field.
5. Check the Hide field if you want to hide a record from an extract file when you run the write process.

Note: Hidden data elements appear in the extract result after you run the extract process, but are hidden when you initiate the extract write process.

6. Choose the Sort button to define a data element sort order for this file layout definition.
7. Choose the Advanced Conditions button if you only include this record when a specific event occurs.
8. Repeat steps 2-6, page 5-15 for each record in your file layout definition.
9. Save your work.

To define the sort order of the data elements in a record:

You can use the Sort window to define up to four levels of sorting for each record in a file layout. You can sort by any data element included in a record.

1. Select the record in the File Layout window for which you are defining the data element sort order.

Note: Selecting a record limits the data elements by which you can sort to the data elements contained in that record. You can sort by a data element that you do not want to display in a record by adding that data element to the record and checking the Hide field.

2. Choose the Sort button to display the Sort window.
3. Select the primary data element by which you want to sort the record in the First Sort field.
4. Select the second data element by which you want to sort the record in the Second Sort field.
 - You can further sort the record by selecting data elements in the Third and Fourth Sort fields.
5. Save your work.

Conditions of Inclusion for File and Record Layouts

You use the Record Layout Advanced Conditions window or the File Layout Advanced Conditions window to define the conditions that must exist for a data element to be included in a record or for a record to be included in a file.

Note: Conditional inclusion is based on a text comparison of a data element value with a value you supply. It is recommended that you test your conditional inclusion criteria for accuracy on a small number of records before creating an extract.

To define the conditions of inclusions for an extract layout:

1. From the Layout Definition window, do one of the following:
 - Choose the Record Layout tabbed region. Enter or query a record for which you are defining conditional inclusion criteria.
 - Choose the File Layout tabbed region. Enter or query a file for which you are defining conditional inclusion criteria.
2. Choose the Advanced Conditions button.
3. Enter the Seq (sequence) number in which the system checks for this condition.
4. Select a Data Element Name from the list of data elements in this layout definition.
5. Select an Operator based on your conditions of inclusion for this data element.
6. Enter a Value for the data element.

Note: When you click into the Value field, a sample entry appears based on the operator you selected. Substitute your data element value for the sample value. For example, if you select an operator of Equals (=), enter the exact value surrounded by single quotation marks.

7. Select a value of either And or Or if your inclusion criteria contains more than one data element value.
8. Select an Action that excludes the record based on whether the conditions of inclusion are true or false.

9. Save your work.

Defining a System Extract

You use the Define Extract window to define and maintain the definition of a system extract.

Your extract definition includes an extract criteria profile and an extract layout definition that you have already defined as well as other parameters needed for the extract batch process, such as the extract date range and the output directory and file name of the extract file.

To define a system extract:

1. Enter an Extract Name that uniquely identifies this extract definition.
2. Select the kind of data that you want to include in the extract in the Type field.
 - Choose either Full Profile, Changes Only, or Communication.
3. Enter an XML tag name if you output the system extract file in XML format.

Note: The XML tag name defaults to the name you assign the record. When you define the Extract Definition, you can choose to extract a text file or an XML file.
4. Select an extract criteria profile in the Inclusion Criteria field to limit the results of the extract.
5. Select a file layout definition in the File Layout field that limits the records included in this extract to those defined in this file layout.
6. Enter the Output Directory where you want to write the results of the extract.

System Extract validates the directory you enter against the parameter UTL_FILE_DIR set up by your database administrator. If you want to write to additional or different directories, your database administrator must update UTL_FILE_DIR with the additional paths.
7. Enter the name of the output file in the Output File Name field.
8. Select an Output Type—either Flat File or XML File—to determine the format of the extract file.

Note: Select Flat File to generate a single text file. Select XML File to generate three files with the extensions, .xml, .xsl, and .xsd.
9. Check the Append Current Request ID field if you want to add the request ID to the file name.

In the Options tabbed region:
10. Check the Kickoff Write Process Automatically field if you want to write the results of this extract to a file when you run the benefits extract batch process.

Note: If you want to review the results of your extract before writing the results to a file do not check this field. You can write the extract results to a file by running the extract write batch process from the Concurrent Manager.

11. Check the Special Handling for Dependents (ANSI 834, HIPAA) field if you are defining this extract to conform with ANSI 834 or HIPAA standards.

Note: If you check this field, you should consider selecting the data element of Person Participation Type (ANSI) when defining the layout for this extract to distinguish participant and dependent enrollment records in the extract results.

12. Check the Update Communication Sent Date field if you are defining an extract for communications.
13. Save your work.

Viewing Extract Change Events for a Person

You use the Change Event Log window to view the change events that have occurred to a person or to delete a change event from the log.

Note: You can view change events for multiple persons by running a system extract that includes change event criteria.

To view change events for a person:

1. Query the Name, Social Security number, or other standard identifying information for this person.

The system displays the change events for this person.

2. Select a change event to view the Old and New Values for the event.
3. You can delete a change event from the log by selecting a Change Event row and clicking the delete icon on the toolbar.
4. Save your work if you deleted a change event from the log.

Viewing Extract Results

You use the Extract Results window to view the output of a system extract run, including summary information, detailed results by person, and run results errors.

To view the results of a system extract:

1. Query an extract result that you want to view in the Extract Name field. The system displays summary information for the extract, including:
 - The run Request ID and Run Status
 - Extract run dates and times
 - Number of records in the extract result
 - Number of records, people, and errors in the extract result
 - The extract output directory and file name
2. Select a Run Status of Approved by User if you want to approve an extract result with a status of Job Failure.

Note: You cannot successfully run the extract write process for an extract with a status of Job Failure unless you change the run status

to Approved by User. Conversely, you can change an extract with a status of Successful Completion to Rejected by User to prevent the extract write process from writing out an extract file.

3. Save your work if you changed the status of this extract run result.
4. Choose the Details button to view extract results by person.
The system automatically queries all persons who were processed in this run. For each person, the system displays:
 - The run records that comprise the system extract definition
 - The data elements for each record
 - The value of each data element for this person
5. Choose the Header and Trailer button to view records, data elements, and values for the header and footer regions of this system extract report.
6. Choose the Errors button to view by person any errors that occurred in the system extract generation process.
 - Select an error and choose the More button to view a description of the error.
7. Correct any errors, if necessary, and re-run the system extract process or load the extract file onto the delivery medium by which it is sent to your third party benefits administrator or other outside party.

Running the Benefits Enrollment and Confirmation Reports

Run the Benefits Enrollment Kit Report to view electable choices for one or more persons. The report also displays enrollment deadlines and indicates any default plans that will be in effect if the person makes no election.

Run the Benefits Confirmation and Summary Report to view enrollment results for one or more benefits participants. The report displays results for participants who are enrolled in:

- Plans in program
- Plans not in program
- Multiple programs

Use the Submit Request window to run either report. You need a postscript viewer to see the results of the report.

To run the benefits enrollment or confirmation report:

1. Select Benefits Reports Wrapper Process in the Name field.
2. Enter the Parameters field to open the parameters window.
3. In the Report Name field, select either the Benefits Enrollment Kit Report or the Benefits Confirmation and Summary Report.
4. Enter the Effective Date of the report.
5. Select from a variety of criteria to limit the results of the report, such as a:
 - Compensation object

- Life event
 - Type of assignment
 - Coverage start and end date
6. Indicate if you want to report on results such as:
 - Dependents and beneficiaries
 - Action items and certifications
 - Flexfield data
 7. Choose the OK button.
 8. Complete the batch process request and choose Submit.

Running the System Extract Batch Processes

Use the Extract Process to extract records from the database for transmission to a third party, such as a carrier, payroll provider, or other benefits vendor.

Update the user profile option BEN: Max Extract Line Size to set the maximum length of a record generated by the Extract Write Process.

See: User Profiles, page 1-46

You use the Submit Requests window to run the system extract batch processes for an extract definition that you have created.

See: Benefits System Extract, page 5-3.

To run the system extract batch process:

1. Select the Extract Process in the Request Name field.
2. Select the Extract Name as the parameter for this process.
3. Enter the effective date on which you want to run the report.
4. Choose the Submit Requests button to run the report when you finish defining this batch process.
5. View the results of the Extract Process in the Extract Results window by querying the name of the extract.

See: Viewing Extract Results, page 5-18.

The Extract Process also produces a summary report and an error report that you can review.

6. Run the Extract Audit Report from the Concurrent Manager to view a limited selection of records from the extract results.
7. Run the Extract Write Process from the Concurrent Manager to write the results of the extract to the file you specified in your extract definition.

Restarting an Extract Process

If the Extract Process terminates for any reason, you can run the Extract Restart Process to resume extracting data records from the point where the Extract Process stopped.

You run processes from the Submit Requests window.

To restart an Extract Process:

1. Select the Extract Restart Process in the Name field.
2. Enter the Parameters field to open the Parameters window.
3. Select the Benefit Action ID number of the extract process that has stopped.
4. Choose the OK button.
5. Complete the batch process request and choose Submit.

Purging System Extract Results

When you run the Extract Process, the application writes the output to the results tables. To free table and disk space, you should periodically purge this data.

Run the Extract Results Data Purge process to delete extract results in batch mode. If you want to delete a specific extract record, you can do so from the Extract Results window.

Prior to purging extract results, confirm that you no longer need the results or that you have written the output to a file using the Extract Write Process.

To purge a specific extract:

1. Open the Extract Results window.
2. Query the result that you want to delete.
3. Choose the Delete icon from the toolbar.
4. Confirm the deletion.
5. Save your work.

To purge extracts in batch mode:

1. Navigate to the Submit Requests window.
2. Select the Extract Results Data Purge process.
3. Open the parameters window.
4. In the Validate field, select whether to Commit or Rollback the results of the purge process.
5. Optional: select an Extract Name to purge the results of a single extract.
6. Set the effective date of the process.

Note: The purge process deletes all extract results on or before the effective date.

7. Choose Submit.

Copying a System Extract

You can copy a system extract from one business group to another after you define the data elements, record layouts, file layout, and selection criteria that comprise the extract definition.

The copy process does not support seeded extract definitions. You copy seeded extracts directly from the Extract Definition window.

Note: Any extract criteria in your source extract definition must also exist in your target database. For example, if you filter extract records by a change event, you must enable the change event in the target business group. You cannot copy Advanced Criteria.

You run processes from the Submit Requests window.

To copy a system extract:

1. Select Extract Definition Download to Data File in the Name field.
Run this process from the source business group that contains the extract definition you want to copy.
2. In the Location and File Name field, enter the directory path and file name where you want to copy the extract.
Your database administrator should provide you with a valid directory path. If you do not enter a path, the download process writes the file to the directory where you store your concurrent manager log files.
3. Select the Extract File Layout Name that you want to copy from your list of extract definitions.
4. Click OK.
5. Complete the batch process request and choose Submit.

To upload a copied system extract:

1. Select Extract Definition Upload from Data File in the Name field.
Run this process from the target business group to which you want to copy the extract definition.
2. In the Location and File Name field, enter the directory path and file name where you downloaded the extract definition.
If you are copying between database instances, you must physically move the downloaded data file to a directory where you can upload the file into the target business group.
3. Select Commit or Rollback in the Validate field.
The copy process will not update an extract that you have already copied. Run the upload process in Rollback mode to fix errors listed in the audit log before you commit the upload.
4. Click OK.
5. Complete the batch process request and choose Submit.

If you copy an extract definition and any extract criteria in your target business group do not match the source business group, you must recreate the data in the target after you complete the upload process. You can make any other changes to your extract definition after you complete the upload.

If you encounter any errors when uploading the extract definition, verify that you:

- Set the patching level of the target database to the same level as the source database.
- Enable any Change Event codes in the target business group that you use in the source business group.
- Make available any applicable selection criteria or decoded values in the target business group.

Batch Element Entry

BEE (Batch Element Entry)

Using **BEE** is the fast way to enter batches of elements on a regular basis, or when compensation levels or policies change. For example, in each payroll period you can use BEE to:

- **Record timecard data** needed for regular pay processing, such as hours worked, location or shift worked, absences, and costing or labor distribution data
- **Enter special nonrecurring earnings or deductions** to be processed in the period
- **Enter one-time changes** to recurring earnings or deductions

From time to time, you might also use BEE for:

- **Enrollment in PTO Accrual Plans**, perhaps for a group of newly hired employees
- **Changes to salary, bonuses, commissions**, and other types of earnings to maintain information about employee compensation

When you enter absences in a batch, BEE creates absence records as well as element entries.

How To Enter a Batch

Each batch has a header and as many batch lines as you require; a batch line is one element entry for an assignment. Lines within a batch can have different effective dates. There are three ways you can enter batches:

- Enter input values and other data for one element, and run a concurrent process to create identical batch lines for all the assignments in an assignment set.
- Create an element set and make entries for each element in the set, one assignment at a time.
- Select an element and create or update lines for this element using defaults to speed entry, and changing defaults as necessary when working through the batch.

You can use any of these approaches in combination in a batch.

For example, to give an identical bonus to all full time employees in the Finance Division, you could create an assignment set for these employees and run a concurrent process to enter the bonus for the set. Then, to handle part time employees, you could select the bonus element in the Batch Lines window and create a batch line individually for each part time employee, entering a pro rata bonus amount.

Validation of Batch Entries

To validate a batch after saving it, you run the BEE validation process from the Batch Header window. This process checks the header and each line of the batch. For example, it checks that each assignment number exists in the database, and that you have specified values for all required input values. It also runs any validation formulas you have defined for the input values.

You can add your own validation procedures to the standard process. For example, you can set up control totals or extra business validation.

Control Totals

Control totals are predefined for checking the number of lines in a batch and for summing pay values and hours. You can create control totals for other numerical element input values by defining a lookup for the lookup type `CONTROL_TYPE`. If you need other kinds of control totals, you can define lookups for them, but you must also write a validation procedure for checking the batch against the total.

Transfer to Entries Table

When the batch is ready for transfer to the database, you run the BEE transfer process from the Batch Header window. This process first performs the same checks as the validation process. It transfers the valid element entries from the temporary tables to the Entries table in Oracle HRMS. Invalid lines are marked in error. You can correct these lines and rerun the transfer process to reprocess just these lines.

You can choose whether the transfer process automatically purges the entries from the temporary tables after transfer. You can also run a separate purge process.

You should not attempt to process concurrently batches that contain the same assignments. If an assignment exists in more than one batch that you try to process at the same time, the processes may fail due to assignment interlocks.

Rollback

After a successful BEE transfer, you can roll back the transfer process if you want to completely remove it. You can choose to roll back the transfer even if some of the entries have been processed.

You roll back the transfer from the Submit Requests window. Oracle Payroll users can also roll back processes from the Payroll Processes window, or individual batch lines from the Assignment Processes window.

Batch Statuses

The batch status depends on the status of the batch header, all the batch lines, and any control totals specified for the batch. On the Batch Header window, you can see the following status values:

Valid All of the lines, control totals, and header are valid

Transferred All of the lines, control totals, and header have been transferred.

Transfer Incomplete The header and control totals have been transferred, along with some of the lines.

Unprocessed At least one line, control total, or the header is unprocessed, and no lines have been transferred.

Error The header has not been transferred and at least one line, control total, or the header is in error.

Status Mismatch The combination of statuses in the header, lines, and batch is not consistent. For example, it is inconsistent for the header to have the status error when some of the lines have the status Transferred.

Note: A status mismatch is not possible if you always use the Batch Header and Batch Lines windows to enter and maintain a batch.

Making Batch Element Entries Using BEE

To make batch element entries using BEE, this is the overall procedure:

1. If you want to use a concurrent process to create an identical batch line for several assignments, create an assignment set.

See: Creating an Assignment Set, *Payroll Processing Management Guide*

2. If you want to create several batch lines for each assignment, create one or more customization element sets.

Note: Each element set should contain a maximum of 20 elements since this is the limit on the number that can be viewed in the Batch Assignment Entry window (four elements on each of the five tabs).

See: Defining an Element or Distribution Set, *Compensation and Benefits Management Guide*

3. Identify the batch, supply any external totals against which to balance it, and determine what should happen if any of the batch lines duplicate existing element entries.

See: Entering a Batch Header, page 5-27

4. Enter the batch.

If you are using an assignment set, you enter details for one element and run a concurrent process to create identical batch lines for each assignment.

See: Creating the Same Line for Several Assignments, page 5-29

Then, if necessary, you can edit these line by line, using defaults to help you enter missing information.

See: Creating or Editing Individual Batch Lines, page 5-30

If you are using element sets, you select an assignment and element set, enter a line for each element in the set, select another assignment, repeat the process, and so on.

See: Creating Several Lines for One Assignment, page 5-31

5. Validate the batch.

See: Validating a BEE Batch, page 5-32

Note: If you have several batches to validate, transfer, or purge, you can process them in a single operation from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-34.

6. Review the results, correct any lines with a status of Error, then validate again.

See: Reviewing BEE Process Results, page 5-33

7. Transfer the batch to the HRMS Entries table.

See: Transferring a BEE Batch, page 5-32

8. Purge the batch from the BEE tables if this was not done automatically on transfer.

See: Purging a Batch From the BEE Tables, page 5-33

If you have transferred a batch, but not purged it, you can roll back the transfer if you want to remove it completely from the HRMS Entries table. See: Rolling Back a BEE Process, page 5-34

Entering a Batch Header

You can enter batches of element entries in the Batch Header and Batch Lines windows. The header identifies the batch and determines what happens if any of the batch lines duplicate existing element entries.

To enter a batch header and control totals:

1. Set your effective date to the date when you want the entries to take effect.
2. Enter a name for the batch, and enter a reference number and the source of the batch, if you require these for your own reference.
3. Select what action the process should take if one of the batch lines matches an existing element entry for an assignment at the effective date.
 - Create New Entry - The process creates a new entry if multiple entries of the element are allowed by the element definition. If multiple entries are not allowed, the process sets the status of the batch line to Error.
 - Reject Entry - The process sets the status of the batch line to Error.
 - Change Existing Entry - The process corrects or updates the existing entry. If there is more than one existing entry, the process sets the status of the batch line to Error.

The Undefined option is display-only (for batches created using SQL*Plus or a similar tool).

4. If you selected Change Existing Entry, select the type of date effective change to be made to recurring entries:
 - Update - The process changes the existing entry from the effective date, but preserves the previous information. If there are future-dated changes to the existing entry, the process inserts the change before the next scheduled change.
 - Correct - The process corrects the existing entry from its start date through to its end date. Any future-dated changes are unaffected.
 - Override - The process changes the existing entry from the effective date, but preserves the previous information. If there are future-dated changes to the existing entry, the process replaces all future-dated changes with the batch line.

Notice that if you select this option, you cannot check the Reject if Future Changes check box.

The Undefined option is display-only (for batches created using SQL*Plus or a similar tool).

5. If you want to reject batch lines that match entries that start in the future or for which future changes are scheduled, check the Reject if Future Changes check box.

Notice that if you check this box, you cannot select the Override option.

6. If you want the batch to be purged from the temporary tables after successful transfer to Oracle HRMS, check the Purge After Transfer check box.

7. If you want to cancel a rollback process if the system detects run results for any of the batch lines, check the Reject Rollback if Results Exist check box.

Note: The process interlock rule (which prevents you rolling back a payroll process if any further processing has taken place) does not automatically apply to BEE Rollback. If you leave this box unchecked, you can perform a rollback even if run results from payroll processing exist for any of the lines.

8. If you want to delete the batch automatically after a rollback, check the Purge After Rollback check box.
9. If you are going to use the Assignment Lines window and you want the system to display automatically any existing lines in this batch for an assignment and element set you select, check the Auto Query box.
10. If you are going to use the Batch Lines window and you want the system to display an error if you enter an invalid assignment number, check the Auto Validation box.

Control Totals

11. If you use control totals to validate the batch before transfer, choose the Totals button
12. Select a batch control type (such as Hours, to sum all the values in the Hours input value, or Line Count, to check the number of lines in the batch).
13. Enter the control total for each control type.

You can enter as many types and totals as you require.

Setting Up BEE Validation Using Control Totals

You can validate a BEE batch against control totals to check for missing lines or miskeying of amounts.

You can set up as many control types as you require. The following control type is predefined: `_COUNT_LINES_`, which checks the number of lines in a batch.

You can set up control types to sum the entries in any numerical input value, using the Application Utilities Lookups window.

To define a control type:

1. Query the lookup type `CONTROL_TYPE`.
2. Enter a new lookup code called `_TOTAL_COLUMN_x`, where x is any unique suffix you choose to identify this control type. For example, you could define a code called `_TOTAL_COLUMN_BONUS`.
3. Enter the meaning for this lookup code. The meaning must be the name of the input value you want to sum.

The meaning is displayed to users when they select a control type for a batch.

4. Enter a description.
5. Save your work.

Important: If your control type does not sum a numerical element input value, do not call the lookup code `_TOTAL_COLUMN_x`. Use another naming convention. In this case, you will need to write

a procedure that validates batches against your new control type. See: *Creating Control Totals for the Batch Element Entry Process, Implementing Oracle HRMS*.

Creating the Same Line for Several Assignments

Use the Create Batch Lines window to create identical lines for all assignments identified by an assignment set. This is a quick way to create many lines for an element or an element set. If you select a single element and the input values need to vary between assignments, you can leave these blank and add them later using the Batch Lines window. If you select an element set, the batch will contain blank lines for each element. You can leave them blank to accept the default values for the input values, or you can edit individual lines in the Batch Lines window.

To enter batch lines for an assignment set:

1. Enter or query a batch header in the Batch Header window, and choose the Assignment Set button.
2. In the Create Batch Lines window, select the assignment set and payroll that identify the employees you want to create lines for.
3. If you are creating blank lines for an element set, select the set and enter an effective date for the entries. Then go to step 9.
4. If you are creating lines for a single element, select the element and enter input values as appropriate.
5. The following fields may be available depending on your localization and the element you selected:
 - Enter Further Information for this element entry.
 - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).
6. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.
7. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record, however the absence element is entered as of the effective date.
8. Change the effective date if required.
9. Choose the Process button to submit a concurrent process called Create Batches. Confirm that you want the system to create the lines.

The Create Batch Lines window now closes, taking you back to the Batch Header window.
10. Choose the Assignment Set button again if you want to add lines for another element. Requery your batch and choose the Element Lines button if you want to view and edit the lines created by the process.

Creating or Editing Individual Batch Lines

In the Batch Lines window, you can enter new lines for individual assignments, and you can view and edit lines created automatically for an assignment set. You can speed up entry of new lines by entering default input values

Note: A batch can contain lines for as many elements as you require. Lines within a batch can have different effective dates.

To enter individual batch lines:

1. Enter or query a batch header in the Batch Header window, and choose the Element Lines button.
2. Select the element for which you want to make entries.
3. To enter default values to speed up the data entry, choose the Defaults button. The Defaults window displays the input values for the selected element.
4. Enter default values in any of the fields in the Defaults window. These defaults apply to all new entries in the batch, but not to any entries you have already made. You can change the defaults at any time during your data entry.

Note: These defaults will override any defaults defined for the element or element link. To use the element or link defaults, leave the input value blank. These defaults are entered during the BEE transfer process.

5. Uncheck the Display check box for any field that you do not want to display in the Lines window. You can hide any fields for which the default is correct for every entry.
6. In the Lines window, enter the data required for the batch. Lists of values are available on some fields, but no validation is enforced during data entry.

Note: You will not see any defaults defined for the input values, but if you leave the input values blank, the defaults are entered during the BEE transfer process.

7. The following fields may be available depending on your localization and the element you selected:
 - Enter Further Information for this element entry.
 - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).
 - Select a third party payment method in the Payee field to enter information about a third party recipient of a payment resulting from a deduction.
8. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.
9. You can override the Effective Date for any line. This is the effective start date for a new entry or the effective date of an update.
10. If you selected an absence element, enter the absence start and end dates. BEE uses these dates to create an absence record, however the element is entered as of the effective date.

11. Save your entries. If you want to make entries for another element, select the element, enter new defaults, enter the lines, then save again.

Retrieving Existing Batch Lines

Use the Batch Lines window to view existing batch lines.

To retrieve existing batch lines:

1. Do one of the following:
 - Select the element in the Element field.
 - Check the Unknown Elements check box if you are querying batch lines entered for an invalid element (or no element) by SQL*Plus or another tool.
2. Choose the Find button.

Updating a Batch

You can update a batch at any time before you transfer it. If you make any changes to a batch with the status Validated or Error, the batch status changes to Unprocessed.

Creating Several Lines for One Assignment

Use the Batch Assignment Entry window for fast entry of several batch lines for one assignment. You can make one or more entries for each element in an element set.

To enter lines for one assignment:

1. Enter or query the batch header in the Batch Header window and choose the Assignment Lines button.
2. Select an assignment and element set.
3. Enter the input values for the first four elements in the set. Lists of values are available on some fields, but no validation is enforced during data entry.

Note: You will not see any defaults defined for the input values, but if you leave the input values blank, the defaults are entered during the BEE transfer process.
4. The following fields may be available depending on your localization and the element you selected:
 - Enter Further Information for this element entry.
 - For a non-recurring element, optionally select a date within the current payroll period in the Date Earned field. The entry will not be processed until this date (that is, the Date Earned of the Payroll Run must be on or after this date).
 - Select a third party payment method in the Payee field to enter information about a third party recipient of a payment resulting from a deduction.
5. Enter a number in the Subpriority field if you want to determine the processing sequence of multiple entries in the payroll run. Lower priority numbers process first.
6. You can override the effective date for any line. This is the effective start date for a new entry or the effective date of an update.
7. For absence elements, enter the absence start and end dates. BEE uses these dates to create an absence record, however the element is entered as of the effective date.

8. If there are more elements in the set, click on the next tab to display them. Continue entering input values.
9. When you have made entries to as many elements as you require from the set, save your work.
10. If you want to make entries for another assignment, select the assignment, enter the lines, then save again.

Note: The entry values from the previous assignment are not cleared automatically from the form. So you can use the same values without retyping, you can type over the existing values, or you can use the Down Arrow key to clear the record.

Validating a BEE Batch

The validation process tests each batch line against certain predefined rules about element entries, and also against your own rules if you have created additional validation procedures.

You can also validate several batches together from the Batch Summary window. See: *Processing Multiple BEE Batches Together*, page 5-34.

To validate a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Validate, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window. If you have several batches to review, query them in the Batch Summary window.

See: *Reviewing BEE Process Results*, page 5-33.

Transferring a BEE Batch

A batch exists in the temporary BEE tables only until you run the transfer process to create element entries in the Oracle HRMS Entries table.

You can also transfer several batches together from the Batch Summary window. See: *Processing Multiple BEE Batches Together*, page 5-34.

To transfer a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Transfer, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.
3. When the concurrent request is completed, query the batch in the Batch Header window.

If the Batch Status is Transferred, there were no errors in the batch and the process has created the element entries. The process may have issued messages associated with the batch header, lines, or control totals.

If the Batch Status is Error, a control total or all the batch lines have the status Error. Check the status fields in the Batch Lines window and the Control Totals window, and review the messages issued by the process.

If the Batch Status is Transfer Incomplete, the process has created element entries for some of the batch lines. The other lines have the status Error. You must correct these lines and rerun the transfer process until the Batch Status is Transferred.

Purging a Batch From the BEE Tables

If the Purge After Transfer check box on the Batch Header window is checked when you run the transfer process, the batch is deleted from the BEE tables automatically after the transfer. If the box is not checked, you can purge the batch by running a separate process.

You can purge a batch with any status.

Important: You cannot roll back a batch transfer if you have purged the batch from the BEE tables.

You can also purge several batches together from the Batch Summary window. See: Processing Multiple BEE Batches Together, page 5-34.

To purge a batch:

1. Query the batch in the Batch Header window, and choose the Process button.
2. Select Purge, and choose Start. The system displays the concurrent request ID so that you can query it on the Requests window.

When the concurrent request is completed, the batch is purged.

Reviewing BEE Process Results

To review the results of a batch process, use the Batch Summary window. Oracle Payroll users can also review batch results and retry or rollback batch transfers on the Payroll Processes window.

To review batch process results:

1. Query one or more batches by name, reference, or status in the Batch Summary window.

If a batch status is Error, at least one line, control total, or the header is in error.

2. Click on a batch to select it and choose the Errors button to identify the problem with a batch that has the status Error or Transfer Incomplete. The Messages window opens. You can view all messages or query them by type: Batch Header, Batch Line Level, or Control Total.
3. To see and correct a batch, click on it in the Batch Summary window and choose the View Batch button. The Batch Header window opens with the selected batch displayed.
4. From the header window, you can view lines, control totals, or messages:
 - To view the status of individual lines in the batch, choose the Element Lines button. In the Batch Lines window, select an element and choose Find.

Note: If the batch status is Transfer Incomplete, you can only modify or delete the lines that are in error, or the control totals.

- If you entered control totals for the batch, choose the Totals button on the Batch Header window to view the status for each control type.
- To view messages for the whole batch, or all lines, or control totals, choose the Messages button. Use the option group at the top of the Messages window to control which messages are displayed.

Processing Multiple BEE Batches Together

You can use the Batch Summary window to validate, transfer, or purge several batches in a single action.

To process multiple batches:

1. Query the batches by name, status, or reference id in the Batch Summary window.
2. Use the Process check boxes to select the batches you want to process. You can use the Select All button to check all the boxes, then uncheck some as required.

Important: Do not select multiple batches that contain the same assignments. The batches are processed at the same time, and interlock problems may arise if two processes try to process the same assignment. To avoid this, ensure your batches contain separate sets of assignments.

3. Choose the Process button and select the process you require (Transfer, Validate, or Purge) and choose Start. The system displays the concurrent request IDs for the batches so that you can query them on the Requests window.
4. When the concurrent requests are completed, the Batch Summary window displays the status of each batch and you can review any errors.

See: Reviewing BEE Process Results, page 5-33.

Rolling Back a BEE Process

After a successful BEE transfer or partial transfer, you can roll back the transfer process if you want to completely remove it. You can choose to purge the batch as part of the rollback process.

The process interlock rule (which prevents you rolling back a payroll process if any further processing has taken place) does not apply to BEE Rollback. You can still perform the rollback even if run results from payroll processing exist for any of the lines.

If the batch included absence entries, the rollback removes the absence records as well as the element entries.

You run the BEE Rollback process from the Submit Requests window.

Note: Oracle Payroll users can also roll back a batch, or individual batch lines from the Payroll Processes window or Assignment Processes window.

To roll back a BEE process:

1. Select the batch header name of the process you want to roll back.
2. Enter Yes to cancel the rollback process if the system detects run results for any of the batch lines. Enter No if you want the system to complete the rollback even though run results exist.
3. Enter Yes to keep the batch after the rollback. Enter No to delete the batch after the rollback.

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-41
- General Compensation Structures, page B-46
- Salary and Grade Related Pay and Progression, page B-47
- Compensation and Awards Management, page B-53
- Leave and Absence Management, page B-54
- Health and Welfare Management, page B-57
- Other Payroll Earnings and Deductions, page B-57
- Payrolls, page B-58
- Payroll Payment and Distributions, page B-58
- Payroll Statutory Deductions and Reporting, page B-61
- Payroll Processing and Analysis, page B-66
- Payroll Event Rules, page B-71
- Deploy Self Service Capability, page B-71
- Workforce Intelligence, page B-71

This is followed by the list of processes, page B-71.

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.

EE04 Reports (US)

Run this report for state and local governments.

EE05 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 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.

French D2 Report (Declaration Annuelle Obligatoire D'emploi des Travailleurs Handicapes, de Mutilés de Guerre et Assimilés) (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.

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'hommale (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-74
- Synchronize GL Company Cost Centers with Existing Organizations, page B-82

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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