Oracle® Self-Service Human Resources

Deploy Self-Service Capability Guide

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Oracle Self-Service Human Resources Deploy Self-Service Capability Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Self-Service Human Resources Deploy Self-Service Capability Guide*.

Audience

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*.
- Oracle Workflow

  To learn more about Oracle Workflow, read the *Oracle Workflow User's Guide* or the *Oracle Workflow Developer's Guide*.
- 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 xii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

Related Documents

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Guides Related to This Product

OA Personalization Framework and OA Extensibility Framework

Learn about the capabilities of the 5.6 Framework technologies.

Oracle Human Resources Management Systems Enterprise and Workforce Management Guide

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

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

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

Oracle Human Resources Management Systems Payroll Processing Management Guide

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

Oracle Human Resources Management Systems Compensation and Benefits Management Guide

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

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

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

Oracle Human Resources Management Systems Implementation Guide

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

Oracle Human Resources Management Systems FastFormula User Guide

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

Oracle Human Resources Management Systems Deploy Strategic Reporting (HRMSi)

Implement and administer Oracle Human Resources Management Systems Intelligence (HRMS*i*) in your environment.

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

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

Implementing Oracle Approvals Managemement

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 *i*Recruitment to manage all of your enterprise's recruitment needs.

Using Oracle Learning Management

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

Implementing Oracle Learning Management

Implement Oracle Learning Management to accommodate your specific business practices.

Oracle Time and Labor Implementation and User Guide

Learn how to capture work patterns such as shift hours so that this information can be used by other applications such as General Ledger.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

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

"About" Document

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms–Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

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Introduction to Oracle Self-Service Human Resources (SSHR)

Overview

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

Features of SSHR

Key features of SSHR include the following:

- Configurability

  SSHR uses the Oracle Applications Framework (OA Framework) technology to enable flexible personalizations options. For example, you can personalize your self-service pages to reflect your corporate identify, or to reflect the specific business processes in your organization. You can personalize content, appearance, and self-service transactions to suit your requirements and those of the individual user. You can personalize self-service applications to suit role, experience, work content, language, and information needs.

- Intuitive layout

  The pages and windows used in SSHR have an intuitive layout and enable users to carry out business processes and transactions without the need for extensive documentation or instruction. Notes and messages are available on pages if appropriate and meaningful.

- Dynamic routing of transactions

  SSHR utilizes workflow technology to enable you to define dynamic routing and approvals paths for your self-service transactions. You can use Oracle Workflow to configure any process that requires routing, approval, and submission.

- Delivery of workforce intelligence

By providing manager functions in SSHR, you can deliver intelligence and information to managers, HR Professionals, executives. These users can retrieve and query information simply and quickly.

- Improved accuracy of data

  By enabling users to enter and maintain their own information, data input is more accurate and up-to-date. This also reduces repetitive data entry tasks for HR administrators.

- Streamlined business processes

  By allowing managers, HR Professionals, contingent workers, and employees to work in a paperless environment, you can streamline business processes, reduce administration costs, and improve service. Users can make their own decisions about benefits options and work preferences, for example, and view information online including payslips and tax forms.

- Integration with Oracle Approvals Management (OAM)

  Oracle Approvals Management (OAM) enables you to define routing rules for your transactions. By using OAM with SSHR, you ensure that your self-service transactions are received and approved or rejected by the correct user.

Scope of SSHR

SSHR functions are available for all major functional areas in Oracle HRMS: Workforce Sourcing and Deployment, Compensation, Benefits, and Payroll Management, and Enterprise and Workforce Management. Within these functional areas, some functions are available in SSHR only, some are available in the Forms Interface only, and some are available in both SSHR and the Forms Interface.

For information on the self-service functions available for each functional area, see: Self-Service Modules, page 1- 5 .

What is SSHR?

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

What does self-service mean?

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

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

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

- easy-to-use user interfaces
- easy access to functions via web browsers
- complex processes reduced to simple steps

- reliability and scalability enabling many people to experience good response times, for example during an annual benefit enrollment period
- opportunities to configure and extend the application to meet enterprise needs
- system accessibility for people who are not Human Resource specialists
- ability to configure SSHR web pages to suit user requirements.

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

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

Introduction to Self-Service

SSHR Licences

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

SSHR delivers particular functionality according to your base product licence. If you have licenced SSHR you have access to all SSHR HRMS functionality with the following exceptions:

- Oracle Advanced Benefits (OAB). Although the self-service Benefits functions are available with Standard Benefits which is included in the HRMS licence, additional functionality is available if you purchase OAB. For example, life event restrictions in the Advanced Benefits model allow you to use Self-Service Benefits at any time during the year.

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

- Oracle Training Administration - You must purchase a separate licence to be able to use the self-service training function.
- Payroll - You must purchase a separate licence to be able to use the self-service payroll functions.

Key Concepts in Self-Service Human Resources (SSHR)

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

Application Object Library (AOL) function

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

See also: Self-Service Function

Business Process

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

See: The Personalization Framework, page 5- 3

MDS (Meta Data Services) Repository

An active repository that stores information on the appearance and behavior of self-service pages. Customers can configure changes to the definitions held in the MDS Repository using the Personalization Framework.

See: The Personalization Framework, page 5- 3

Oracle Applications (OA) Framework

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

Personalization Framework

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

Region

A region in the MDS Repository defines a section in a page in Oracle Self-Service Web Applications. The region is defined in terms of elements such as fields and buttons.

Self-Service Function

Self-service functions appear as menu options to the SSHR user. The function determines how the self-service modules are called. For example, the same self-service module is used for Personal Information from both the manager and employee menus but the function determines whether the module is called in Employee or Manager mode.

Self-Service Module

A set of dynamic web pages and related components (for example, workflow process and definitions stored in the MDS Repository, stored procedures). Examples include Personal Information, Competencies, and Assignment.

Transaction

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

Workflow Builder

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

See: Self-Service Workflows, page 4- 3

Workflow Function

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

See: Self-Service Workflows, page 4- 3

Workflow Process

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

Self-Service Modules

This section provides a brief description of the delivered SSHR modules. For available functions within each module, see the individual sections on each module.

Summary of SSHR Modules

Note: In the tables below the Manage or Employee/Worker column refers to the type of activities that the responsibility would do, rather than a function that would specifically appear on a Manager or Employee menu.

Common Modules

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

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

Enter Process

The Enter Process enables the user to:

- Select a person from a searchable list of people
- Select a person from their supervisor hierarchy or from their position hierarchy
- Add and remove people from their personal list of employees and workers

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

Integration with Oracle Approvals Management

From version 4.1 onwards, SSHR uses the Oracle Approvals Management (AME) application to define and manage approval logic. For more information on AME, see: *Implementing Oracle Approvals Management* (available on MetaLink).

The existing method of defining customizable PL/SQL packages for approvals is still supported in this release as an alternative to AME.

See: Oracle Approvals Management (AME), page 6- 6

Manager Actions

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

See: Navigation Paths, page 3- 6

See: Actions Page, page 7- 7

Return for Correction

The Return for Correction modules enables managers to return a transaction either to the initiator of the transaction or a prior approver of the transaction for correction. The person to whom the transaction is returned for correction will receive a notification.

See: Return for Correction, page 7-10

New User Registration

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

See: New User Registration, page 7-26

Review and Confirm

The Review and Confirm module shows details of transactions that a user has updated or details about pending transactions that require approval. The user can review the information displayed to ensure that all the details are correct before the changes are finally submitted to the database. If necessary, the user can return to the previous screen to change incorrect information. The user can also perform What If analyses to ascertain the effect any changes will have on an person's benefits.

See: Review and Confirm, page 7-13

Personal Actions

The Personal Actions module is the employee/worker equivalent of Manager Actions. The user is presented with a context-sensitive list of actions that they can perform on themselves.

See: Navigation Paths, page 3- 6

See: Actions Page, page 7- 7

Document Manager

The Document Manager modules enables you to automatically generate business documents containing data from self-service actions.

See: Document Manager, page 7-19

Save for Later

The Save for Later functionality enables a user to interrupt a transaction before the data is submitted. The transaction is saved in a transaction table from which it can be retrieved and continued at a later time. Users can select those transactions which they have explicitly saved for later, or which were partially saved at the time of a system failure or time-out, from the All Actions Awaiting Your Attention list in the Actions page.

See: Save for Later, page 7-18

Workforce Sourcing and Deployment

People Management

The following section lists the SSHR functions within People Management.

Employee Directory

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Employee Directory	Both	No	Global

Employee Directory

The Employee Directory module provides an easily accessible, highly configurable lookup of people within your organization. Users can search for a specific person against a range of data, and traverse the organization hierarchy to view details of a person's manager or direct reports. The directory can be accessed either from Self Service, Portal, or anonymously from any web page.

Manage Employment Events

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Assignment	Manager	Yes/Yes	Global
Change Location	Manager	Yes/Yes	Global
Change Manager	Manager	Yes/Yes	Global
Other Employment Information	Manager	Yes/Yes	Global
Employee or Contingent Worker Pay (Pay Rate, Assignment Rate)	Manager	Yes/Yes	Global
Extra Information Types (EITs)	Both	Yes/Yes	Global
Special Information Types (SITs)	Both	Yes/Yes	Global
Employee or Contingent Worker Termination (Termination, End Placement)	Manager	Yes/Yes	Global
Work Schedule	Manager	Yes/Yes	Global

Manage Employment Events (MEE)

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

Assignment

The Assignment module enables a manager to change a person's assignment information. If the person has multiple assignments, you can display and change any assignment.

See: Assignment, page 8-37

Change Location

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

See: Location, page 8-46

Change Manager

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

See: Change Manager, page 8-58

Extra Information Types (EITs)

Extra Information Types for SSHR enable you to store additional person and assignment information.

See: Extra Information Types (EITs), page 8-50

Other Employment Information

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

See: Other Employment Info, page 8-53

Pay Rate

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

See: Pay Rate, page 8-54

Assignment Rate

The Assignment Rate module enables a manager to enter and record contingent worker rates, per assignment, based on assignment rate types, such as overtime or weekend rates.

See: Assignment Rates, page 8-56

Special Information Types (SITs)

Special Information Types enable you to store additional information that is not currently captured by the system.

See: Special Information Types (SITs), page 8-48

Termination

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

> **Note:** You cannot reverse a termination in SSHR.

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

See: Termination, page 8-42

End Placement

The End Placement module enables a manager to end a contingent worker's work relationship, and specify a reason. You can also use the Change Manager process to reassign the contingent worker's reports..

See: End Placement, page 8-43

Work Schedule

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

See: Work Schedule, page 8-45

Organization Management

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Organization Manager	Manager	Yes/Yes	Global

Organization Manager

The Organization Manager module enables a manager to maintain organization manager relationships.

> **Note:** Organization manager relationships can only be initially created in the Professional Forms Interface.

See: Organization Manager, page 8-60

Personal Information

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Basic Details	Both	Yes/Yes	Global
Main Address	Both	Yes/Yes	Global
Other Address	Both	Yes/Yes	Global
Phone Number	Both	Yes/Yes	Global
Emergency Contacts	Both	Yes/Yes	Global
Dependents and Beneficiaries	Both	Yes/Yes	Global

Personal Information

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

- Basic personal details

  See: Basic Details, page 8- 4

- Address

  See: Main Address, page 8- 5

- Other addresses

  See: Other Address, page 8- 7

- Phone number

  See: Phone Numbers, page 8- 8

- Dependents and beneficiaries

  See: Dependents and Beneficiaries, page 8- 9

- Emergency contacts

  See: Emergency Contacts, page 8-11

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

See: Personal Information, page 8- 3

Professional Details

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

Professional Details

The Professional Details modules enable users to maintain professional details. They can be used by both employees and their managers, however, certain functions can be restricted for manager access only.

The Professional Details menu contains the following functions:

Education and Qualifications

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

See: Education and Qualifications, page 8-12

Other professional awards

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

See: Other Awards, page 8-14

Competency profiles

The Competency Profile module enables employees and managers to store information on skills and competencies.

See: Competency Profile, page 8-16

Work preferences

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

See: Work Preferences, page 8-18

Resume

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

See: Resume, page 8-19

Tenure Status (US)

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

See: Tenure Status, page 8-20

Academic Rank (US)

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

See: Academic Rank, page 8-21

Views

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
My Information	Employee/Worker	No/No	Global
My Employee Information	Manager	No/No	Global
HR Views	HR Professional	No/No	Global

My Information/My Employee Information

My Information and My Employee Information offer users access to employment and assignment records containing information about employment, salary, performance, training, absence, and job applications. Employees can view their personal records and managers can view the records for the people they manage.

See: My Information and My Employee Information, page 8-64

HR Views

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

See: HR Views, page 8-63

Recruiting and Hiring

Module Name	Manager or Employee/Manager	Workflow chainable/ Approval	Localization
Candidate Offers	Manager	No/Yes	Global
Hire	Manager	No/Yes	Global
French New Hire	Manager	No/Yes	France
French Applicant Hire	Manager	No/Yes	France
Contingent Worker Placement	Manager	No/Yes	Global

Apply for a Job

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

For information on Apply for a Job, see Apply for a Job Workflows, *Oracle HRMS Implementing Oracle Self-Service Human Resources 3.4*.

Candidate Offers

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

For information on Candidate Offers, see: Recruitment Workflows, *Oracle HRMS Implementing Oracle Self-Service Human Resources 3.4*.

Hire

The Hire process is used by managers to enter details about new employees and hire them into their enterprise.

See: Hire or Placement, Place Contingent Worker Processes, page 8-78

Contingent Worker Placement

You can use the Contingent Worker Placement process to bring contingent workers into the organization and give them an assignment.

See: Hire or Placement, Place Contingent Worker Processes, page 8-78

Talent Management

Career and Performance Management

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Appraisals	Both	No/Yes	Global
Apply for a Job	Both	No/Yes	Global
Employee Reviews	Both	No/Yes	Global
Events and Bookings	Both	No/No	Global
Suitability Matching	Both	No/No	Global
Succession Planning	Manager	No/No	Global

Appraisals

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

See: Appraisals, *Oracle HRMS Workforce Sourcing, Deployment, and Telend Management Guide*

Succession Planning

The Succession Planning module enables a manager to plan for future vacant positions by identifying possible successors for the positions.

For general information on Succession Planning, see: Career and Succession Planning, *Oracle HRMS Enterprise and Workforce Management Guide*.

Events and Bookings

The Events and Bookings module enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and employees, enabling managers to book their subordinates onto events.

See: Events and Bookings, page 9- 2

Suitability Matching

The Suitability Matching module enables managers to find suitable people for an existing or planned work opportunity, or find suitable work opportunities for a person. Employees can find opportunities for themselves.

For general information on Suitability Matching, see: Suitability Matching, *Oracle HRMS Enterprise and Workforce Management Guide*.

Employee Reviews

The Employee Review module enables employees/workers and managers to create or update reviews. Employees and workers can create their own reviews and managers can create reviews for their employees and workers. Both managers and employees can invite reviewers to attend the review.

See: Employee Review, page 9- 3

Training

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
External Training	Both	No/No (can be configured)	Global
Training	Both	No/No (can be configured)	Global

External Training

The External Training module enables employees and managers to enter and update attendance in courses not registered as events in Oracle Training Administration.

The External Training module replaces the Training History function available in SSHR 3.4.

Training

The Training module enables employees to enroll in a class and cancel the enrollment. Managers can enroll their subordinates in training classes and cancel the enrollment if appropriate.

The Training module replaces the SSHR 3.4 functions Enroll in a Class and Cancel Enrollment.

See: Training, page 9-21

Compensation and Benefits Management

Leave and Absence Management

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Absences	Both	No/Yes	Global

The Absences module enables employees or managers to enter absence-related information using a self-service interface. Users can submit and update absence requests. Planned, confirmed, and updated requests are then submitted for approval.

See: Absences, page 10- 3

Benefits

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Benefits Enrollment	Both	No/No	Global
Benefits Enrollment	Employee/Worker	No/No	Federal

Benefits Enrollment

Benefit Enrollments enables an person to:

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

See: Self-Service Benefits Enrollments, page 10- 6

For information on US federal self-service benefits, see: Federal Health Employee Benefits Overview, page 10-38

Compensation

Module Name	Manager or Employee/Worker	Workflow chainable/ Approvals	Localization
Compensation Workbench	Manager	No/Yes	Global
Individual Compensation Distributions (ICD)	Manager	Yes/Yes	Global

Compensation Workbench

The Compensation Workbench enables managers to determine and allocate compensation awards such as salary increases, bonuses, and stock options using a self-service interface. Managers can also view details on their direct reports, prepare budgets, and generate reports.

See: Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*

Individual Compensation Distributions (ICD)

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

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, page 10-90

Payroll

Module Name	Manager or Employee/Worker	Workflow chainable/ Approval	Localization
Online Payslip	Both	No/No	Australia, US, UK, Canada, Hong Kong, Korea New Zealand, Singapore, South Africa, Netherlands
Personal Payment Methods (Direct Deposit)	Both	No/Yes	Global
Online Tax Form (W-4)	Both	No/No	US
Online W-2 Form	Employee/Worker	No/No	US

Online Payslip

The Online Payslip module enables a user to view their payslip using a Web browser when the required payroll processes have been run. Payslips are available for all assignments for which payroll has been completed. Employees can display payslips for the most recent payroll period or for previous payroll periods.

See: Online Payslip, page 11- 8

Tax Information Form (W-2)

The Tax Information form gives summary tax information for tax years from 2001 onwards. The form is used for information purposes only as it contains no updateable fields and cannot be submitted in place of the paper version of the form.

See: Tax Information Form (W-2) (US), page 11-20

Tax Withholdings Form (W-4)

The Online Tax Form module enables a user to submit US Tax Withholdings forms (W-4 tax forms) using a Web browser. The user can use the form to update withholding information. A defined contact person will then receive notification of the changed information.

See: Tax Withholdings Form (W-4) (US), page 11-18

Voluntary Deductions

You can use the Individual Compensation Distributions (ICD) module if your enterprise uses voluntary deduction plans, such as a charitable contribution or savings bond plan.

You define ICD plans using the same application windows that you use to define Benefits plans. ICD is available to users of both Standard and Advanced Benefits.

See: Individual Compensation Distributions, page 10-90

Personal Payment Methods

The Personal Payment Methods module enables a user to determine how they are paid. The available payment methods are cash, check, deposit, or a combination.

See: Personal Payment Methods, page 11- 3

Getting Started

Overview

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

See: Minimum Requirements for an SSHR System, page 1-23

For a list of all implementation steps, see Implementation Steps for SSHR, page 12- 3

Notes on Migrating from SSHR Version 3

The following notes provide you with information that is useful if you are upgrading your SSHR installation from 3.x to 4.x or 5.x:

- SSHR 4.x/5.x may be installed in the same instance as SSHR 3.x
- SSHR 3.x components are still supported
- You can have both SSHR 4.x/5.x and SSHR 3.x functions on the same menu
- You can set up equivalent 4.x/5.x functions when they become available. In doing this, you would compare the new and old workflow processes and reapply workflow changes as required.

  See: Self-Service Workflows, page 4- 3

  > **Note:** Some 3.x workflow attributes are obsolete in SSHR 4.x/5.x as they have been replaced by the Personalization Framework functionality.

- When ready, simply migrate your users to the 4.x/5.x functions. You can switch over to 4.x/5.x functions one at a time, if required.

Understanding a Typical SSHR Function

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

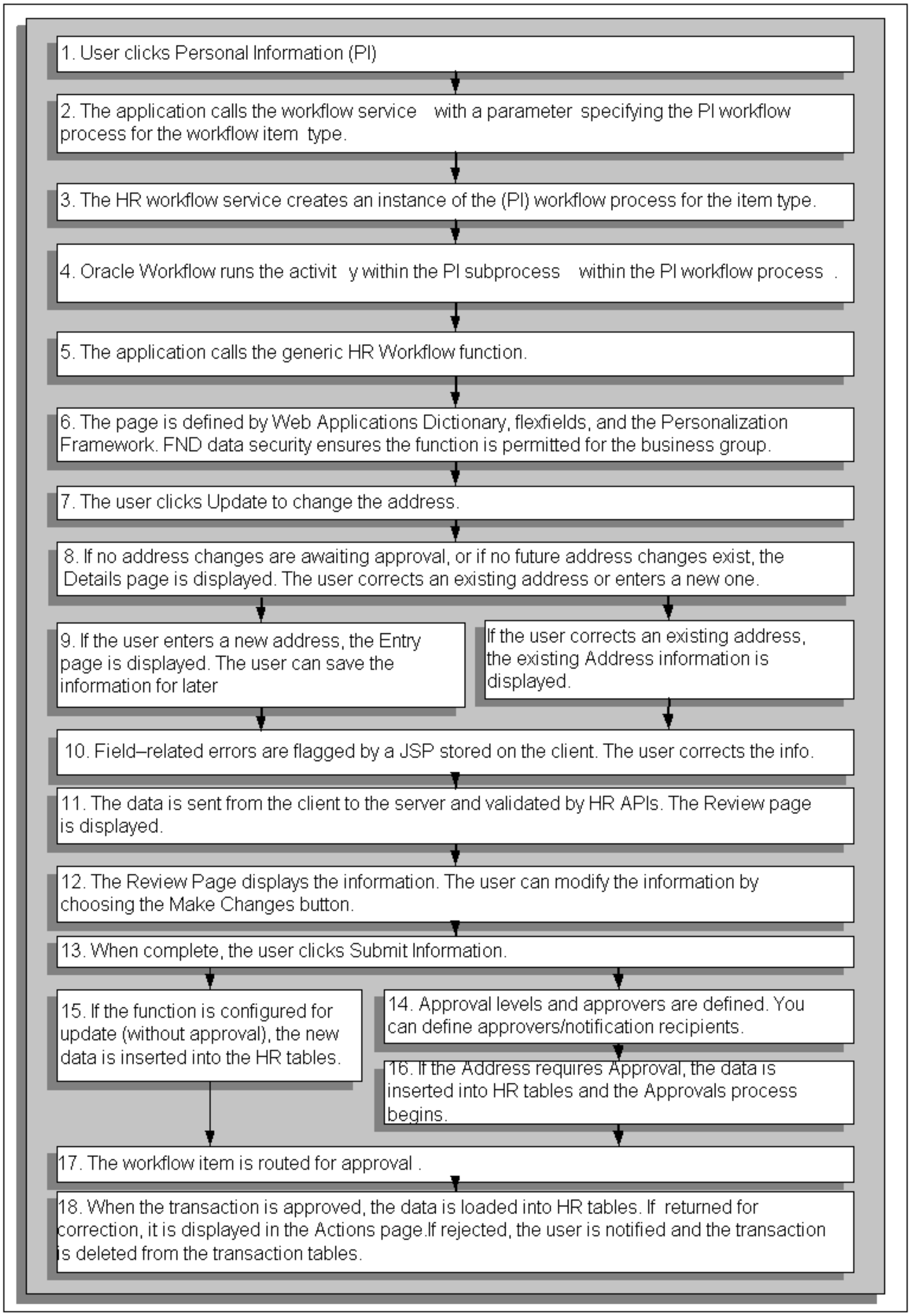
By following the functional flow of the Personal Information function, you should understand how information is passed from the web browser to Oracle Applications, how Workflow is used by SSHR, how the page layout is controlled by the definitions held in the MDS Repository and the Personalization Framework,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

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

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

How an SSHR Function Works

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



1. The user chooses the Personal Information function from the user menu.
2. The application calls the HR workflow service (OA.jspsOA.jsp?akRegionCode= HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800) with a parameter

specifying the Personal Information workflow process for the workflow item type (HR_MAINT_PERSONAL_DETAILS_PRC).

See: Self-Service Workflows, page 4- 3

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

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

   See: User Access and Security, page 3- 3

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

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

6. A page is displayed based on the definition of the OverviewPG document in the MDS Repository. The page is influenced by any context-sensitive flexfields and the cumulative effect of any Personalization Framework configurations that relate to this document.

   See: The Personalization Framework, page 5- 3

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

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

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

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

   See: Save for Later, page 7-18

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

9. When the user has entered the information (or is ready to complete the transaction), they click the Continue link at the bottom of the page. Any field-related errors (bad formatting, missing fields, and so on) are flagged by a JavaScript procedure stored on the client and the user is asked to correct this information.

10. Web page data is sent from the client to the server and server-side validation is performed by HR Application Programming Interfaces (APIs). If all fields are validated, the Review page is displayed.

    See: Review and Confirm, page 7-13

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

    See: Dynamic Approvals, page 6- 3
14. If the Main Address part of the Personal Information function is configured for update without requiring approval, the new address data is inserted directly into the HR tables. (This step is the same process as step 18 for changes requiring an approval.)
15. If the Main Address part of the Personal Information function is configured to require approval, the data is inserted into HR transaction tables and the Approvals process begins for that item.
16. The workflow item is routed for approval according to the configuration of the Approvals process.
17. The approver can either approve or reject the transaction or return it to the user for correction.

    If the transaction is returned for correction, it is displayed for the user in the All Actions Awaiting Your Attention list in the Actions page. The user can reopen the transaction. The previous values are reloaded from the transaction tables ready for the user to make the required changes and resubmit.

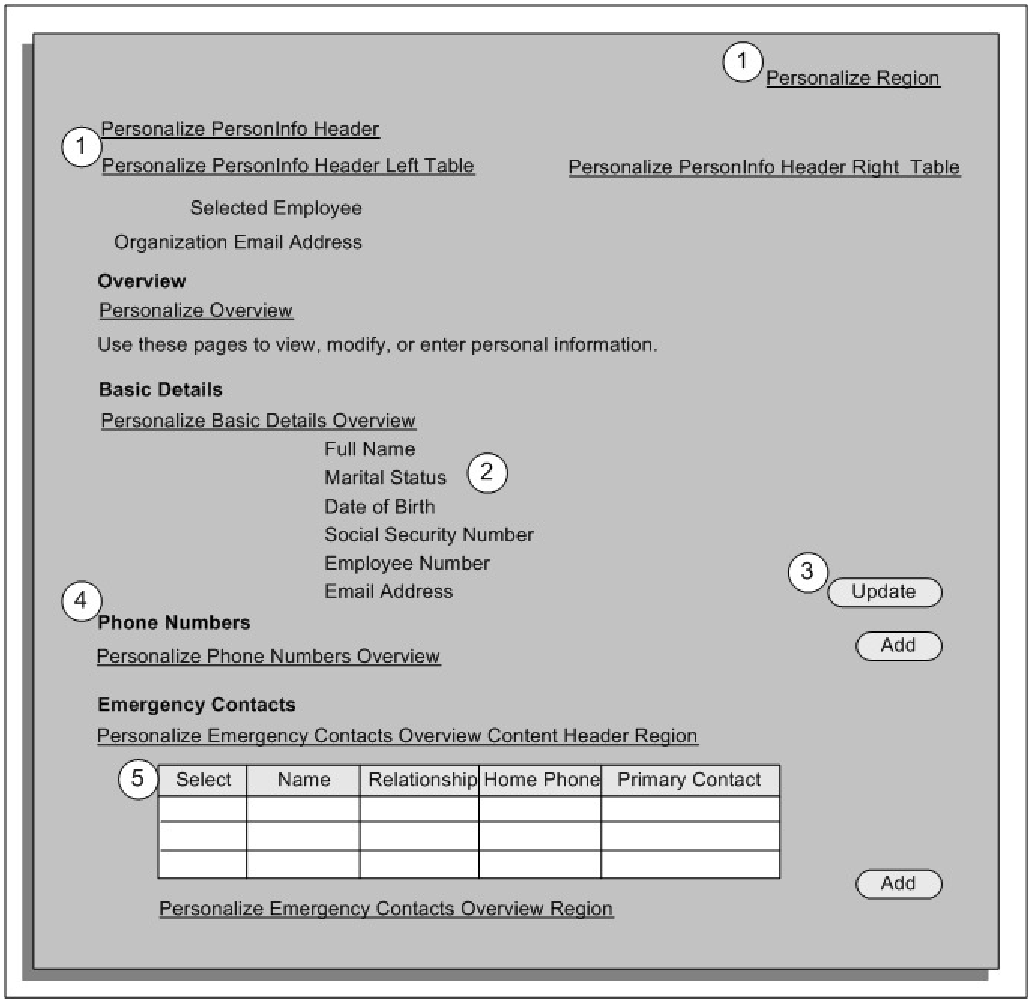
    See: Save for Later, page 7-18

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

A Typical SSHR Web Page

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

Sample Web Page



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

1. Add or remove links to enable personalization configuration
2. Change the sequence of fields
3. Add or remove buttons to control user's ability to update fields
4. Rename region items
5. Configure table views

See: The Personalization Framework, page 5- 3

Getting Started with SSHR

The following procedure gives you the basic implementation steps that are required to enable you to run SSHR in a test environment. For information on running SSHR in a production environment, please see the detailed chapters in this Implementation Guide and also the Implementation Steps, page 12- 1 .

To set up an SSHR system:

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

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

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

     If you have not licensed SSHR, please contact your Oracle sales representative for information on purchasing a licence.

     See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
7. Add the Manager Self Service and Employee Self Service responsibilities to your users (use either new or existing users).

   See: Self-Service Responsibilities and User Menus, page 3-11

   See: Responsibilities, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
8. Link the users to (new or existing) employee records in HRMS.

   See: Defining User Access and Menus, page 2- 6

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

   For information on a typical SSHR function, please see: Understanding a Typical SSHR Function, page 1-19

2

Extending SSHR

Configuration Overview

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

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

- User Access, page 3- 1
- Workflow, page 4- 1
- Page Layouts, page 5- 1
- Approvals, page 6- 1

Extending SSHR

Guidelines for Configuring SSHR Functions

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

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

> **Note:** If function-level personalizations have been delivered by Oracle for a function you wish to copy, be aware that you will lose these personalizations if you create a custom version of the function.
>
> See: Function-level Personalizations, page 5- 3

See Supplied Functions, page 2-11 and Menu Function Parameters, page 2-22 for information on parameter use in functions.

User Access

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

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

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

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

See: User Access and Security, page 3- 3

Process Flows

If the SSHR modules are workflow-enabled (see: Summary of SSHR Modules table, page 1- 6), you can choose to modify the predefined process flow if required. For example, you can chain two modules together (where permitted) or introduce additional branching logic.

See: Self-Service Workflows, page 4- 3

Approvals

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

See: Approvals, page 6- 3

Page Layouts

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

You modify page layouts using the Personalization Framework.

See: The Personalization Framework, page 5- 3

Module-specific Configuration Options

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

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

Transaction History

The history of all transactions and changes to transactions is stored on the database. If you need to investigate transaction history you can query the tables below using either SQL*Plus, Discoverer workbooks, or Report*Writer reports.

Data Mining Action History tables

Table name	Description	Primary Key
PQH_SS_TRANSACTION_HISTORY	**Transaction History** This table holds historical information that identifies each transaction. The data in this table is unlikely to change over the course of a transaction.	Transaction ID
PQH_SS_APPROVAL_HISTORY	**Approval Changes** This table tracks actions taken by approvers. Each action taken by an approver constitutes a separate entry.	Transaction Id and Approval Id
PQH_SS_STEP_HISTORY	**Step History** The Step History table stores changes to existing transactions.	Transaction Id, Transaction Step Id and Approval Id
PQH_SS_VALUE_HISTORY	**Transaction Value History** This holds transaction values for every step history created.	

Legislation and Customer Overrides

An override enables a user to customize field values and data in a code package . An override is different from a user hook, which enables users to write code and update both fields and HRMS database tables.

Within SSHR, you can use overrides in the following situations:

- To customize the fields used when loading data from Oracle HRMS tables to the Employee Directory repository tables to meet user and legislation requirements. For example, to enable single sign on for the Employee Directory you use an override to add the FND_USER field to the Employee Directory tables..

  For more information, see: Enabling Customer Overrides for the Employee Directory, page 8-30.

- To populate the Employee Directory with data.

  For more information, see: Legislation and Customer Overrides for the Employee Directory, page 8-33.

- To configure the read-only display of job and position fields in the following pages.
  - My Information and My Employee Information

    See: My Information and My Employee Information, page 8-64.

  - Person Header and Assignment Headers in all Manager Self-Service pages.
  - Selected Enter Process pages
    - People in Hierarchy page

(supervisor hierarchy and position hierarchy)

- My List page
- Simple Search page

  Note: The overrides are not used in the Advanced Search page as the job and position fields are used for searching.

- Person Detail page

See: Examples of Overrides, page 2- 5

To enable an override, you must carry out the following steps:

1. Open the required package. This package may be one of the following:
   - perwscor.pkb (for My Employee Information)
   - peredcor.pkb (for the Employee Directory)

   Note: The packages reside in the following directory:

   $PER_TOP/patch/115/sql directory

2. Modify the override flag in the package to enable the customer override. The override flag is similar to the following line of code:

   ```
   g_override_flg BOOLEAN:=FALSE
   ```

   Change the BOOLEAN value to TRUE.

3. Insert your code for the override. For examples of code, see the documentation relevant to your function:
   - Customer Overrides for Single Sign On, page 8-30
   - Legislation and Customer Overrides for the Employee Directory, page 8-33
   - My Information and My Employee Information, page 8-64

4. Compile the override and apply to database.

   When the override packages are implemented, they are called by the application.

Examples of Overrides

Displaying Position or Job Names

You can use customer overrides to configure a user-defined format for displaying position or job names. For example, you can choose to replace the defined format for displaying a user's job with a user-defined name format consisting of fewer segments.

For example, instead of displaying a job as:

12345.Global Development.Development Manager.12B

you can display only the third segment (Development Manager).

To make this change, you need to modify the perwscor.pkb code package to include the following code:

> **Note:** The packages are available within $PER_TOP/patch/115/sql directory. The file containing the package header is perwscor.pkh.

```
FUNCTION getJobName(
  p_job_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2//Actual MLS job name
)
return varchar2
```

To make a similar change to the position field, you need to modify the package to include the following code:

```
FUNCTION getPositionName(
  p_pos_id  IN number,
  p_bg_id  IN number,
  p_value  IN varchar2
)
return varchar2
```

You also need to change the job override and/or position override flag to TRUE in the package. In the following example, only the job override flag is set to TRUE.:

```
g_job_override_flg   BOOLEAN:=TRUE;
g_position_override_flg BOOLEAN:=FALSE
```

Defining Menus for SSHR

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

You configure menus in the Menus window.

To set up menus for self-service:

1. Review the sample functions in the Employee Self-Service User Menu, Contingent Worker Self Service Menus, and the Manager Self-Service User Menu. Decide which functions you want to include in your user menus.

   See: Self-Service Responsibilities and User Menus, page 3-11

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

2. Create your own menu based on the predefined menus.

3. Make sure that all the functions you require are listed in the Function column of your menu.

4. Make sure the following submenus are attached to your custom menu:

   - Employee Enter Process menu - for employee, worker, and manager menus
   - Personal Actions menu - for employee, worker, and manager menus
   - Manager Actions menu - for manager menus
   - HR Self-Service Pages sub menu - for manager menus
   - SSHR hierarchy and search functions - if your menu calls the Hierarchy, My List, and Search functions

5. Make sure that the following functions are attached to your custom menu:

   - Personal Actions V4.0 (or a configured copy) - for employee and worker menus

- Manager Actions V4.0 (or a configured copy) - for manager menus
- Suspended Actions - for employee, worker, and manager menus

6. Save your work.

Defining User Access to Self-Service Functions

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

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

To define a responsibility for a self-service application:

1. Follow the standard procedure for creating a responsibility.

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

2. Define your responsibilities to be available from Oracle Self-Service Web Applications.
3. Consider whether you should create menu or function exclusions to restrict the employee and contingent worker menus.

To set your system profiles:

1. Set the system profiles for security groups.

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

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

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

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

   > **Note:** You need to restart the Apache listener after changing profile options.

To define a user:

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

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

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

See: Creating Batch User Accounts with Concurrent Programs, page 3-15

Defining Functions for SSHR

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

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

For information on modifying the related workflow processes, see Configuring Workflow Objects, page 4- 7

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

To create a function based on a predefined SSHR function:

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

    Note: The Function Name and User Function Name fields must be unique so insert your standard prefix in front of the value duplicated from the previous record.

4. In the Parameter field, note that the pItemType parameter value is 'HRSSA' (the internal name for the predefined HR workflow item type). Leave this value unchanged but change the pProcessName parameter from HR_PERSONAL_INFO_JSP_PRC to the name of your configured process.

    See: Self-Service Workflows, page 4- 3

5. Change the OAFunc parameter to your configured function name, for example HR_PERINFO_SS
6. If you have created a custom manager function or an Enter Process function (Hierarchy, My List or Search page), you can display a navigation link, or breadcrumb on the web page. To do this add the addBreadCrumb parameter with value N.

    See: Menu Function Parameter Descriptions, page 2-22

7. If you are using Oracle Approvals Management (OAM) for your function, add the following parameters:'

    - pAMETranType=SSHRMS

- pAMEAppId=800

  See: Configuring SSHR Functions to Use Oracle Approvals Management (OAM), page 6-11

8. Enter the parameter values in the HTML call field. You enter the parameters as follows: Note that the HTML call field is made up of several parameters:

   - akRegionCode

     You can use a different person selection page instead of the Hierarchy Page. For example, you may want to launch the Search page as the initial page. This is typically used if you are creating functions for an HR Professional user. Enter the parameter values as follows:

     - HR_PERSON_TREE_TOP_SS

       For the Hierarchy page

     - HR_PERSON_SEARCH_TOP_SS

       For the Person Search page

     - HR_MY_LIST_TOP_SS

       For the My List page

   - akRegionApplicationId

     This value is 800.

To make the function available globally or for specific legislations:

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

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

2. Save your work.

To add the function to an employee or contingent worker menu in the Menus window:

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

   See: Defining Menus for SSHR, page 2- 6

To make a function available from the Actions pages:

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

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

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

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

You create your matching function in the Form Functions window.

1. Query the predefined manager function on which you want to base your function, for example, Personal Information Manager (HR_PERINFO_MGR_SS).

2. Insert a new record beneath it.

3. Move from field to field in the new record using the tab key. In each field, press Shift and F5 to duplicate the field value from the record above. Insert your standard prefix where required.

4. In the Parameter field, change the pCalledFrom parameter to match the name of your original custom function (as created in the above procedure)

   The HTML call field is OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800. This corresponds to the Person Search page. When the user selects a person from this page, SSHR calls the AOL function specified by the pCalledFrom parameter, appending the selected person_id to the pPersonID parameter specified for that function.

5. Save your work.

6. Add the function to the top-level menus and/or submenus as required.

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

Menu Function Parameters

Supplied Functions

This section provides you with a list of all the supplied functions for each delivered menu. Against each function you will see the Web HTML call, and a list of parameters which are also used in the Web call, as they appear in the Forms user interface. The next section will provide descriptions of the parameters.

Payroll Professional Menu

Function Name	User Function Name	Web HTML Call	Parameters
PAY_MGR_EMP_ SEARCH	Employee Search	OA.jsp? akRegionCode= HR_PERSON_ SEARCH_TOP_SS& akRegionApplication Id=800	pCalledFrom= PAY_MGR_EM P_SEARCHp& Destination=PAY_ MGR_PAYSLIP_SS& pManagerEnabled=N

HR Professional Menu

Function Name	User Function Name	Web HTML Call	Parameters
BEN_CWB_ HOME_SWT_ MGR_PAGE	Compensation Workbench Home for Administrators	OA.jsp?akRegionCode= BEN_CWB_ HOME_PAGE& akRegionApplicationId= 805& displayDate=N& displaySwitchManager= Y& OAFunc=BEN_CWB_ HOME_PAGE	None
HR_VIEWS_ SEARCH_INIT IAL	HR Views Person Search Initial Screen	OA.jsp?akRegionCode= HR_SUPER_PERSON_ SEARCH_TOP1_SS& akRegionApplicationId= 800& pViewMenu=HR_ VIEWS& pDestination= & OAFunc=HR_VIEWS_ SEARCH_INITIAL	OAFunc=HR_V IEWS_SEARCH_ INITIAL

Manager Self Service Foundation Menu

Function Name	User Function Name	Web HTML Call	Parameters
HR_MY_SUS_ACTIONS_MGR_SS	Suspended Actions Mgr	OA.jsp?akRegionCode=HR_PROCESS_MY_SUSPENDS_TOP_SS&akRegionApplicationId=800	pMode=LMDA
HR_PERSON_TREE_SS	Manager Actions Tree View	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pDestination=HR_ACTIONS_SS&pCalledFrom=&addBreadcrumb=Y

Employee Self Service Foundation Menu

Function Name	User Function Name	Web HTML call	Parameters
HR_MY_SUS_ACTIONS_SS	Suspended Actions	OA.jsp?akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS&akRegionApplicationId=800	pMode=EDA&pFromMenu=Y
HR_PERSONAL_PROCESS_SS	Personal Actions	OA.jsp?akRegionCode=HR_PERSONAL_PROCESS_TOP_SS&akRegionApplicationId=800	pAssignmentID=& pPersonID=

Manager Self Service Menu

Function Name	User Function Name	Web HTML call	Parameters
BEN_CWB_HOME_PAGE	Compensation Workbench Home	OA.jsp?akRegionCode=BEN_CWB_HOME_PAGE&akRegionApplicationId=805& displayDate=N&WFHomeWorklist=Y&OAFunc=BEN_CWB_HOME_PAGE	None
BEN_SS_MGR_ICD_SRCH	Self Service Individual Distribution-Manager	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=BEN_SS_MGR_ICD&OAFunc=BEN_SS_MGR_ICD& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y

Function Name	User Function Name	Web HTML call	Parameters
BEN_SS_MGR_SRCH	Self Service Benefits Enrollment-Manager	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=BEN_SS_MGR_ENRT& OAFunc=BEN_SS_MGR_ENRT& addBreadCrumb=Y
CANDIDATE_OFFERS	Candidate Offers	hr_offer_form_web.SETUP	None
HR_APPLHIRE_MGR_SS	Applicant Hire Mgr	OA.jsp?akRegionCode=HR_SEARCH_HIRE_APPL_TOP_SS& akRegionApplicationId=800& OAFunc=HR_NEWHIRE_SS	pCalledFrom=HR_APPLHIRE_SS
HR_CAED_MGR_SS	Release Employee Information Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_CAED_SS& AddBreadCrumb=Y
HR_CCMGR_SS	Organization Manager	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_CCMGR_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_CCMGR_JSP_PRC& pCalledFrom=HR_CCMGR_SS& pItemType=HRSSA& pPersonID=& pFromMenu=Y& pManagerEnabled=N
HR_CHANGE_HOURS_MGR_SS	Change Hours Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_CHANGE_HOURS_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_CHANGE_JOB_MGR_SS	Change Job Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_CHANGE_JOB_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_CHANGE_JOB_TERMS_MGR_SS	Change Job and Employment Terms Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_CHANGE_JOB_TERMS_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y

Function Name	User Function Name	Web HTML call	Parameters
HR_CHG_COST_LOC_SUP_MGR_SS	Change Cost Center Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHG_COST_LOC_SUP_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_CHG_COST_TRM_LOC_SUP_MGR_SS	Change Cost Center and Employment Terms Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_CHG_COST_TRM_LOC_SUP_SS& pDestination=HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_EIT_MGR_SS	Extra Information Types Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_EIT_SS&addBreadCrumb=Y
HR_EMPDIR_ADVSRCH_SS	Advanced Search	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/AdvanceSrchPG	None
HR_EMPDIR_EMPDETAIL_SS	Employee Detail	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpDetailPG	None
HR_EMPDIR_EMPPROFILE_SS	Employee Profile	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpProfilePG	None
HR_EMPDIR_HIERARCHY_SS	Organization Hierarchy	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/HierarchyPG	None
HR_EMPDIR_PICPREVIEW_SS	Photo Preview	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/PicPreviewPG	None
HR_EMPDIR_PROXY_SS	Proxy Page	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/EmpDirProxyPG	OAFunc=HR_EMPDIR_PROXY_SS
HR_EMPDIR_SIMPLESRCH_SS	Simple Search	OA.jsp?page=/oracle/apps/per/selfservice/empdir/webui/SimpleSrchPG	None

Function Name	User Function Name	Web HTML call	Parameters
HR_EMP_STATUS_ CHG_MGR_SS	Employee Status Change Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_ EMP_STATUS_CHG_ SS& pDestination= HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_EMP_TERMS_ CHG_MGR_SS	Employee Terms of Employment Change Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_ EMP_TERMS_CHG_ SS& pDestination= HR_ACTIONS_SS& pManagerEnabled=N& addBreadCrumb=Y
HR_FR_APPLH IRE_MGR_SS	French Applicant Hire Mgr	OA.jsp?akRegionCode=HR_ SEARCH_HIRE_APPL_TO P_SS& akRegionApplication Id=800	pCalledFrom=HR_FR_A PPLHIRE_SS
HR_FR_NEWH IRE_MGR_SS	French New Hire Mgr	OA.jsp?akRegionCode= HR_CREATE_SRCH_ NEWHIRE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_FR_ NEWHIRE_SS
HR_LOA_MGR_SS	Leave of Absence Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_LOA_ SS&addBreadCrumb=Y
HR_MANAGER_ MGR_SS	Change Manager Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_ MANAGER_SS& pDestination=HR_ ACTIONS_SS& pManagerEnabled= N&addBreadCrumb=Y
HR_MY_SUS_ACT IONS_MGR_SS	Suspended Actions Mgr	OA.jsp?akRegionCode= HR_PROCESS_MY_ SUSPENDS_TOP_SS& akRegionApplicationId=800	pMode=LMDA
HR_NEWHIRE_ MGR_SS	Hire Mgr	OA.jsp?akRegionCode= HR_CREATE_SRCH_ NEWHIRE_TOP_SS& akRegionApplicationId= 800& OAFunc=HR_NEWH IRE_SS	pCalledFrom=HR_ NEWHIRE_SS
HR_CWKPLACE_ MGR_SS	Contingent Worker Placement Mgr	OA.jsp?page=/oracle/ apps/per/selfservice/ newhire/webui/CWK PlacementPG=HR_NEWH IRE_SS	pCalledFrom=HR_CWK PLACE_SS

Function Name	User Function Name	Web HTML call	Parameters
HR_CWKPLACE_SS	Contingent Worker Placement	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplicationId=800&OAFunc=HR_NEWHIRE_SS	pAMETranType=SSHRMS&pAMEAppId=800&pProcessName=HR_NEWHIRE_JSP_PRC&pItemType=HRSSA&pCalledFrom=HR_CWKPLACE_SS&pFromMenu=Y&pFlowname=CWKPlacement&pEffectiveDate=
HR_PAY_RATE_MGR_SS	Change Base Salary Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_PAY_RATE_SS& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y
HR_PERINFO_MGR_SS	Personal Information Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_PERINFO_SS&addBreadCrumb=Y
HR_PERSON_TREE_SS	Manager Actions Tree View	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pDestination=HR_ACTIONS_SS& pCalledFrom=&addBreadcrumb=Y
HR_SIT_MGR_SS	Special Information Types Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800	pCalledFrom=HR_SIT_SS&addBreadCrumb=Y
HR_SUCCESSION_PLANNING	Succession Planning Menu	hr_succ_plan_menu_web.setup	None
HR_SUIT_MATCH_MENU	Suitabilty Match Menu	hr_suit_match_menu_web.setup	None
HR_TERMINATION_COMP_MGR_SS	Termination with Compensation Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800& OAFunc=HR_TERMINATION_COMP_SS	pCalledFrom=HR_TERMINATION_COMP_SS& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y
HR_TERMINATION_MGR_SS	Termination Mgr	OA.jsp?akRegionCode=HR_PERSON_TREE_TOP_SS&akRegionApplicationId=800& OAFunc=HR_TERMINATION_SS	pCalledFrom=HR_TERMINATION_SS& pDestination=HR_ACTIONS_SS&pManagerEnabled=N&addBreadCrumb=Y

Function Name	User Function Name	Web HTML call	Parameters
HR_TRANSFER_ MGR_SS	Transfer Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HR_ TRANSFER_SS& pDestination=HR_ ACTIONS_SS& pManagerEnabled= N&addBreadCrumb=Y
HR_VIEWS_MGR	Manager Views	hr_mee_views_web.setup	p_called_from=HR_V IEWS_MGR
HXC_T IMECARDS_MGR	TimeCard Manager	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=HXC_ TIME_ENTER& addBreadCrumb=Y
OTA_ADD_TRAIN ING_MGR_SS	External Training Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=OTA_ ADD_TRAINING_SS& addBreadCrumb=Y
OTA_TRAINING_ MGR_SS	Enroll and Cancel Training Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom= OTA_ENROLL_SS& addBreadCrumb=Y
OTA_TRNG_ PLAN_MGR_SS	Training Plans Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=OTA_ TRNG_PLAN_VIEWS_ SS&addBreadCrumb=Y
PER_APPRAISAL_ PERSON_SEARCH	Appraisal Mgr	hr_person_search_tree_web. setup	p_called_from=PER_AP PRAISAL_EMPLOYEE
PQH_ACADEMIC_ RANK_MGR	Academic Rank Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=PQH_ ACADEMIC_RANK& pDestination=HR_ ACTIONS_SS& addBreadCrumb=Y
PQH_EMP_REV IEWS_MGR	Employee Reviews Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=PQH_ EMP_REVIEWS& addBreadCrumb=Y
PQH_EVENT_ BOOKING_MGR	Events and Bookings Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=PQH_ EVENT_BOOKING& addBreadCrumb=Y
PQH_TENURE_ STATUS_MGR	Tenure Status Mgr	OA.jsp?akRegionCode=HR_ PERSON_TREE_TOP_SS& akRegionApplicationId=800	pCalledFrom=PQH_ TENURE_STATUS& addBreadCrumb=Y

Employee Self Service Menu

Function Name	User Function Name	Web HTML Call	Parameters
BEN_SS_BNFT_ ENRT	Self Service Benefits Enrollment-Employee	OA.jsp? akRegionCode= BEN_EFFECTIVE_ DATE_PAGE& akRegionApplication Id=805	displayDate=N& allowEnrt=Y& sessionDate=& sendFY INotification=N& wf ProcessName=FYI_NOTIF ICATION_PRC
HR_APPLY_FOR_ JOB	Apply for Job	hr_workflow_service. create_process	P_PROCESS_NAME=HR_ APPLY_FOR_JOB_PRC& P_ITEM_TYPE=HRSSA
HR_CAED_SS	Release Employee Information	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= HR_CAED_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= HR_CAED_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_ CAED_SS& pPerson ID=& pFromMenu=Y
HR_EIT_SS	Extra Information Types	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= HR_EIT_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= HR_EIT_JSP_PRC& p ItemType=HRSSA& pCalledFrom=HR_E IT_SS& pPersonID=& pFromMenu=Y
HR_LOA_SS	Leave of Absence	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= HR_LOA_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= HR_LOA_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_ LOA_SS& pPersonID= & pFromMenu=Y
HR_MY_SUS_ACT IONS_SS	Suspended Actions	OA.jsp? akRegionCode= HR_PROCESS_MY_ SUS_EDA_TOP_SS& akRegionApplication Id=800	pMode=EDA& pFromMenu=Y
HR_PERINFO_SS	Personal Information	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= HR_PERINFO_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= HR_PERSONAL_INFO_ JSP_PRC& pItemType= HRSSA& pCalledFrom= HR_PERINFO_SS& p PersonID=& pFromMenu= Y

Function Name	User Function Name	Web HTML Call	Parameters
HR_PERSONAL_ PROCESS_SS	Personal Actions	OA.jsp? akRegionCode= HR_PERSONAL_ PROCESS_TOP_SS& akRegionApplication Id=800	pAssignmentID=&p PersonID=
HR_SIT_SS	Special Information Types	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= HR_SIT_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= HR_SIT_JSP_PRC& p ItemType=HRSSA& pCalledFrom=HR_S IT_SS& pPersonID=& pFromMenu=Y
HR_VIEWS_EMP	Employee Views	hr_mee_views_web. setup	p_called_from=HR_V IEWS_EMP& p_mgr= FALSE
OTA_ADD_TRA INING_SS	Enroll and Cancel Training	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= OTA_ADD_TRAIN ING_SS	pProcessName=OTA_ ADDTRNG_JSP_PRC& pCalledFrom=OTA_ ADD_TRAINING_SS& pItemType=HRSSA& pFromMenu=Y
OTA_ENROLL_SS	Academic Rank Overview	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= OTA_ENROLL_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= OTA_ENROLL_IN_ TRAINING_JSP_ PRC& pCalledFrom= OTA_ENROLL_SS& pItemType=HRSSA& pTrainingViewCode=10& pFromMenu=Y
OTA_EXTERNAL_ LINKING_SS	External Training	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= OTA_EXTERNAL_L INKING_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= OTA_EXT_LINK_JSP_ PRC& pCalledFrom= OTA_EXTERNAL_ LINKING_SS& p ItemType=HRSSA& pActivityVerId=& pEvent Id=& pFromMenu=Y& pOATrngFunc=OTA_ ENROLL_SS& pTrng ProcessName=OTA_ ENROLL_IN_TRAINING_ JSP_PRC

Function Name	User Function Name	Web HTML Call	Parameters
OTA_TRNG_ PLAN_VIEWS_SS	Training Plan Views	OA.jsp?page=/ oracle/apps/ota/ trainingplan/webui/ ViewTrainingPlans PG& retainAM=Y	pAMETranType= SSHRMS& pAMEApp Id=800& pCalledFrom= OTA_TRNG_PLAN_V IEWS_SS& pItemType= HR& pFromMenu=Y
PAY_EMP_ PAYMENTS_SS	Manage Payroll Payments	OA.jsp? akRegionCode=PAY_ MPP_TOP_REGION& akRegionApplication Id=801& OAFunc= PAY_EMP_ PAYMENTS_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= PAY_PAYMENTS_JS P_PRC& pItemType= HRSSA& pCalledFrom= PAY_EMP_PAYMENTS_SS
PAY_PAYSLIP_SS	Payslip	OA.jsp? akRegionCode=PAY_ PAYSLIP_TOP_SS& akRegionApplication Id=801	pCalledFrom=PAY_PAYSL IP_SS& pPersonID=
PAY_W2_SS	Employee W2	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= PAY_W2_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= PAY_EMPLOYEE_W2_ PROCESS& pItemType= HRSSA& pCalledFrom= PAY_W2_SS& pPersonID= & pFromMenu=Y
PAY_W4INFO_SS	Employees W4 Information	OA.jsp? akRegionCode= HR_CREATE_ PROCESS_TOP_SS& akRegionApplication Id=800& OAFunc= PAY_W4INFO_SS	pAMETranType= SSHRMS& pAMEApp Id=800& pProcessName= PAY_CHANGE_W4_ INFO_JSP_PRC& p ItemType=HRSSA& pCalledFrom=PAY_W4 INFO_SS& pPersonID=& pFromMenu=Y
PER_APPRAISAL_ EMPLOYEE	Appraisal	hr_workflow_service. create_process	P_PROCESS_NAME=HR_ APPRAISAL_DETAILS_ PRC& P_ITEM_TYPE= HRSSA& P_PERSON_ID=
PQH_ACADEM IC_RANK_ OVRVW	Tenure Status Overview	OA.jsp? akRegionCode=PQH_ ACADEMIC_RANK_ OVRVW_TOP& akRegionApplication Id=8302	pCalledFrom=PQH_ ACADEMIC_RANK_ OVRVW& pPersonID=

Function Name	User Function Name	Web HTML Call	Parameters
PQH_EMP_REVIEWS	Employee Reviews	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=PQH_EMP_REVIEWS	pCalledFrom=PQH_EMP_REVIEWS& pProcessName=PQH_EMP_REV_JSP_PRC& pItemType=HRSSA& pPersonID=
PQH_EVENT_BOOKING_OV	Events and Bookings Overview	OA.jsp?akRegionCode=PQH_EVENTS_SEARCH_TOP& akRegionApplicationId=8302	None
PQH_TENURE_STATUS_OVRVW		OA.jsp?akRegionCode=PQH_TENURE_STATUS_OVRVW_TOP& akRegionApplicationId=8302	pCalledFrom=PQH_TENURE_STATUS_OVRVW& pPersonID=

Contingent Worker Self Service Menu

Function Name	User Function Name	Web HTML Call	Parameters
HR_EIT_SS	Extra Information Types	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_EIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_EIT_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_EIT_SS& pPersonID=& pFromMenu=Y
HR_MY_SUS_ACTIONS_SS	Suspended Actions	OA.jsp?akRegionCode=HR_PROCESS_MY_SUS_EDA_TOP_SS& akRegionApplicationId=800	pMode=EDA& pFromMenu=Y
HR_PER INFO_SS	Personal Information	OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800& OAFunc=HR_PER INFO_SS	pAMETranType=SSHRMS& pAMEAppId=800& pProcessName=HR_PERSONAL_INFO_JSP_PRC& pItemType=HRSSA& pCalledFrom=HR_PER INFO_SS& pPersonID=& pFromMenu=Y
HR_PERSONAL_PROCESS_SS	Personal Actions	OA.jsp?akRegionCode=HR_PERSONAL_PROCESS_TOP_SS& akRegionApplicationId=800	pAssignmentID=& pPersonID=

Function Name	User Function Name	Web HTML Call	Parameters
HR_SPECIAL_ INFO	Special Information	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_ SS& akRegionApplicationId= 800& OAFunc=HR_SIT_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=HR_SIT_JSP_ PRC& pItemType=HRSSA& pCalledFrom=HR_SIT_SS& pPersonID=& pFromMenu= Y
OTA_ADD_ TRAINING_SS	Enroll and Cancel Training	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_ SS& akRegionApplicationId= 800& OAFunc=OTA_ADD_ TRAINING_SS	pProcessName=OTA_ ADDTRNG_JSP_PRC& pCalledFrom=OTA_ ADD_TRAINING_SS& pItemType=HRSSA& pFromMenu=Y
OTA_ ENROLL_SS		OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_ SS& akRegionApplication Id=800& OAFunc=OTA_ ENROLL_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=OTA_ ENROLL_IN_TRAINING_ JSP_PRC& pCalledFrom= OTA_ENROLL_SS& p ItemType=HRSSA& pTrainingViewCode=10& pFromMenu=Y
OTA_ EXTERNAL_ LINKING_SS	Training Link Access	OA.jsp?akRegionCode=HR_ CREATE_PROCESS_TOP_ SS& akRegionApplication Id=800& OAFunc=OTA_ EXTERNAL_LINKING_SS	pAMETranType=SSHRMS& pAMEAppId=800& p ProcessName=OTA_ EXT_LINK_JSP_PRC& pCalledFrom=OTA_ EXTERNAL_LINKING_ SS& pItemType=HRSSA& pActivityVerId=& pEvent Id=& pFromMenu=Y& pOATrngFunc=OTA_ ENROLL_SS& pTrng ProcessName=OTA_ ENROLL_IN_TRAINING_ JSP_PRC
PQH_EVENT_ BOOKING_OV	Events and Bookings Overview	OA.jsp?akRegionCode= PQH_EVENTS_SEARCH_ TOP& akRegionApplication Id=8302	None

Menu Function Parameter Descriptions

This section provides the information you need when configuring your own functions. It tells you how self service functions are defined in the Forms user interface, and lists each menu function parameter, together with the parameter use.

For more information on configuring functions see Guidelines for Configuring SSHR Functions, page 2- 1 .

The function type for all SSHR functions is SSWA JSP FUNCTION (JSP). The Context Dependence is Responsibility. The Maintenance Mode Support is not relevant to self-service functions. These values should be copied into your own functions.

A function Web HTML call has the following format:

OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS&akRegionApplictionID=800&OAFunc=HR_CHANGE_JOB_SS

where the Web HTML call parameters listed in the Forms user interface are separated by "&".

All functions that end in "_SS" (but not those ending in "_MGR_SS") use the following parameters, which are described in greater detail below:

- pAMETranType=SSHRMS
- pAMEAppId=800
- pProcessName=WORKFLOW_PROCESS_NAME
- pItemType=HRSSA
- pCalledFrom=EDA_FUNCTION_NAME
- pEffectiveDate=

The following table describes all available menu function parameters:

> **Note:** References to "_SS" functions exclude "_MGR_SS" functions.

Parameter	Description
OAFunc=<function>_SS	Add this parameter to all the self service _SS functions, providing your own function name. This parameter enables you to do personalization for a specified <function>_SS level.
pAMEAppId=800	Add this parameter to all the _SS functions that contain pAMETranType=SSHRMS to specify the application Id for the transaction type.
pAMETranType=SSHRMS	Add this parameter to all functions that use AME to process approvals. The parameter provides the transaction type name of SSHRMS. If you define your own transaction type provide that transaction type name here.
pCalledFrom=EDA_FUNCTION_NAME	Add this parameter to all the _SS functions that are launched through workflow. It indicates which function calls the current function. Replace EDA_FUNCTION_NAME with the corresponding _SS function name.
pDestination=HR_ACTIONS_SS	Add this parameter to the _MGR_SS functions if the workflow process attached to this function can navigate through the Actions page.

Parameter	Description
pEffectiveDate=	Add this parameter to the _SS function if this function needs the effective date field to be displayed in the actions screen. No value should be set.
pFlowName=<processname>	Use this parameter for functions that require special processing. The process names are "COBRA Registration", "Benefits Registration" & "New Hire".
pGroupName=<documentgroupshortname>	Use this parameter to provide the Document Group short name for a PDF merge
pItemType=HRSSA	Add this parameter to all the _SS and _MGR_SS functions to provide the Item Type.
pManagerEnabled=N	Add this parameter to _MGR _SS functions if managers are not allowed to select themselves in the hierarchy tree; the Action icon for the logged-in manager will be disabled.
pMode=<value>	Add this parameter to your manager or personal action functions with the value of LMDA for manager action functions and EDA for personal action functions.
pPayRate=Y	Use this parameter to indicate that Pay Rate page should be part of the process.
pProcessName=WORKFLOW_PROCESS_NAME	Add this parameter to all the _SS functions that are launched through workflow. Replace WORKFLOW_PROCESS_NAME with the corresponding workflow process name, for example HR_PERSONAL_INFO_JSP_PRC .
pSalChange=Y	This parameter indicates that the process is purely a Salary Change process and does not include Assignment Pages. An appropriate message will be presented on the Effective Date page. If this parameter is absent it defaults to 'N', which indicates that the process includes Assignment related pages.
addBreadCrumb=Y	Add this parameter to MGR_SS functions or Enter Process functions if you want to display a navigation link, or breadcrumb, on the page.

3

SSHR and User Access

User Access Overview

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

See: Security Overview, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

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

Managing User Access in SSHR

The following section answers common questions on SSHR and user access and gives an overview of the functionality.

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

The security controls - responsibilities, menus, and security profiles - used in standard Oracle applications also apply to self-service users. The seeded SSHR menus (Employee Self Service, Manager Self Service, and Contingent Worker Self Service) are collections of functions intended for distinct audiences. The employee functions are constrained to operate only on the current self-service user's record; the manager functions allow the user to select an person from a list of available employees and workers and carry out the required function. The seeded SSHR responsibilities corresponding to each of these menus are useful for exploring the functionality delivered with the product, although they are not intended for production use. Instead, customers can configure their own variations of these menus and responsibilities, combined with appropriate security profiles, to restrict different groups of users to specific functions and employee groups. The Personalization Framework and Workflow Builder tools offer considerable flexibility in controlling the user's access to specific functions and require that users' transactions are approved before they are committed to the database. You can also control the user's access by configuring the base products. For example, Benefits eligibility profiles and enrollment requirements can determine which benefits an employee can select from within the Benefits Enrollment function.

How do I control access to employee information?

In addition to controlling which self-service functions a user can access, you can also control which employee records a user can access. Employees can only access their own personal information. Manager and HR professionals can access the personal information for selected employees. This access is controlled by security profiles which restrict different groups of users to accessing specific employee groups. When a manager selects a function from the self-service menu, the list of subordinate employees and workers is displayed in a hierarchy. If appropriate, you can permit managers to search for employees and workers in other business groups or organizations and if required, you can restrict this access to view-only and prevent managers from performing any transactions on employees outside of their business group.

But what happens if an employee wishes to release their personal information to a third party?

In certain situations, for example, after an applying for a different position, an employee may wish to release their personal information to a third party, for example, a new manager. In this case, the employee can use the Release Employee Information function to enable the new manager to access the employee's personal information.

How are users created for SSHR?

You can follow the standard Oracle procedures to create users and enable self-service by adding the self-service responsibilities to the user. Alternatively, you can use a batch process to create multiple users at one time. The batch processes are particularly useful if you need to create large numbers of accounts after initial installation, or for the new hire process.

SSHR and User Access

User Access and Security

The following description gives an overview of the standard security mechanisms used in Oracle HRMS and discusses how they relate to Oracle SSHR.

Responsibilities

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

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

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

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

User Access to People

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

Employees (non-managers)

Employees and workers can only access their own employee records.

Managers

Managers can process the records for other employees and workers after selecting them from the Enter Process page. In the Enter Process page the manager can switch between View as:

- **Hierarchy**

  This view presents a hierarchical view of the employees and workers reporting to the current user. This view is based on either the supervisor or supervisor assignment hierarchy but can be configured to use the position hierarchy by setting the profile option HR: Self-Service Display Position Hierarchy to Yes.

  For more information on supervisor hierarchies, see Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

- **My List**

  This view contains a user-defined list of people for quick reference.

  > **Note:** If the profile option HR:Expand Role of Contingent Worker is set to Yes, contingent workers will be able to manage other employees.

Person Search

The Enter Process page enables managers to perform a basic search for any employee within the underlying security profile. Alternatively managers can access the Advanced Search page to apply more detailed search criteria.

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

> **Note:** You can extend the security profile for managers by enabling the Release Employee Information function.
>
> See:Release Employee Information, page 7-11

Configuration Options

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

See: Defining User Access and Menus, page 2- 6

You can also control how managers search for employees and workers by assigning profile options. For example, you can apply the HR: Cross Business Group profile option to enable managers to search across business groups. If you then set the HR: Restrict Transactions Across Legislations in SSHR profile to Yes, the names of the employees and workers in other legislations will be disabled.

Security Profiles

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

See: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Employees (non-managers) and contingent workers

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

Managers

If you allow your managers to access the Search functions, you must create suitable security profiles. For most SSHR managers, the most appropriate security profile is a profile based on a supervisor hierarchy. This type of security profile dynamically generates a list of available employees and workers based on either the supervisor hierarchy or the supervisor assignment hierarchy (starting with the current user). The advantage of using a profile of this type is that you can set up a single security profile and use it for multiple users. To activate supervisor security, select either the Restrict by Supervisor (person-based) option or the Restrict by Supervisor (assignment-based) option in the Security Profile window. In this case, the manager can see the records for the persons with at least one assignment for which they are the supervisor and the manager can also see the direct reports for this person.

See: Security Profiles by Supervisor Hierarchy, *Oracle HRMS Configuring, Reporting, and System Administration in Oracle HRMS*

You can choose to build your supervisor hierarchy based on individual assignments. This means that your SSHR manager can only view and update a person's record if the manager is the supervisor for the specific assignment.

See: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration in Oracle HRMS*

Multiple Assignments

If you wish to enable your managers to view and update multiple assignments for employees and workers, you can use the HR:Enable Multiple Assignments in SSHR system profile to allow this.

> **Note:** If you are using supervisor security based on assignments, you must enable this profile option.

If the profile is set to No, managers can only view and update primary assignments. If the profile is set to Yes, managers can view and update only the assignments that are reporting to them through the supervisor hierarchy (or the position hierarchy, if the profile option HR: Display Position Hierarchy is set to Yes).

> **Note:** In the Security Profile window, on the User-Based Security tab, select the Primary Assignments Only check box to restrict managers to viewing and updating primary assignment information only.

See: Defining a Security Profile, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

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

Release Information

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

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

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

If you want managers in your enterprise to have the same privileges for granted employees as for other employees who work for them, you can simply enable the "Allow

Granted Access" option on the security profile they use with their main Manager Self Service responsibility. Alternatively, you may choose to limit managers' capabilities with respect to granted employees. For example, you may restrict managers to selected views and not allow them to use functions such as Termination. To do this, disable the "Allow Granted Access" check box for the main security profile and enable the check box for a separate security profile with a reduced set of functions.

See: Release Information, page 7-11

User Access to Functions

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

Navigation paths

The traditional navigation path for SSHR users is to select a function, for example, Personal Information or Change Manager, directly from a user menu. From SSHR 4.2, SSHR supports this approach but also introduces a new navigation path which uses the Actions pages.

Accessing functions from the Actions pages:

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

Personal Actions

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

Manager Actions

The manager is first presented with the Enter Process page from which they can select an employee assignment. They will then proceed to the Actions page which displays a list of functions available for the selected employee or worker. SSHR derives the list of functions by taking the submenu defined in the HR: Manager Actions Menu profile option and excluding any legislation-specific functions that do not match the legislation code of the selected person's business group.

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

Accessing functions directly from a menu:

Managers

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

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

Other Employees

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

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

Legislation-specific Functions

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

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

Data security grants have been predefined associating each data security menu with the appropriate legislation code (or with all legislation codes in the case of the global menu). The effect of each grant is to enable the functions attached to the corresponding data security menu for people in business groups having the corresponding legislation code.

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

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

See: Data Security Menus, page 3- 9

Users and Responsibilities

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

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

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

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

New User Registration

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

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

See: New User Registration, page 7-26

User Profiles

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

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration*

User Access to Functions

Manager and Employee Functions

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

See: Defining User Access and Menus, page 2- 6

Access Roles for Self-Service Actions

Access roles specify permission to view or update routed transactions, such as self-service actions. You manage access roles for self-service actions in the Maintain Roles window.

SSHR provides two predefined types that you can use to create access roles that govern update permissions in self-service actions:

- SSHR Update Allowed
- SSHR Update Not Allowed

By default, all users can update an action. If you define a role using the SSHR Update Allowed type and assign it to a user, everyone else can no longer update. If you define and assign a role using the SSHR Update Not Allowed type, everyone else can update.

You do not use both types in the same implementation. Your decision to use one type or the other depends on whether the majority of users require update privileges. If they do, use the Update Not Allowed type to remove edit privileges from the remaining users. If the majority do not require permission to update, use the Update Allowed type to grant edit permission to those who do. If your organization has 40,000 people, of whom only 80 require update privileges for self-service actions, it makes more sense to grant privileges to 80 people than to deny them to 39,920.

> **Note:** Position control and budgeting features also use role types to set up roles for routing and approvals. Do not use the predefined role types of Line Manager, HR Manager, or Budget Manager with self-service actions.

See: Defining Workflow Roles for Transactions, *Oracle HRMS Enterprise and Workforce Management Guide*

Self-Service Menus and User Access

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

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

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

See: Defining Menus for SSHR, page 2- 6

Types of Menus

Top-level Menus

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

See: Defining User Access and Menus, page 2- 6

Submenus

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

- Manager Professional Details
- Benefits Self-Service

Hidden Submenus

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

- Manager Enter Process
- Manager Actions Menu
- Personal Actions Menu
- Contingent Worker Personal Actions Menu

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

Actions page. This menu also controls which functions are available from the Actions page when the manager selects their own record.

Data Security Menus

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

The data security menus for SSHR are:

- HR_GLOBAL_SS_FUNCTIONS_SEED

  Contains all the functions that are accessible across legislations (global functions)
- HR_cc_SS_FUNCTIONS_SEED (where cc is legislation code)

  Contains all the functions that are specific to a legislation
- HR_GLOBAL_SS_FUNCTIONS_CUSTOM

  Contains customer functions that are accessible across legislations
- HR_cc_SS_FUNCTIONS_CUSTOM (where cc is the legislation code)

  Contains customer functions that are specific to a legislation

See: Legislation-specific Functions, page 3- 7

Menus for Employees (Non-Managers)

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

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

If you intend that contingent workers use your new employee menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

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

- Personal Actions (or your configured copy of this menu)
- Suspended Actions

You must also make sure that, for any responsibilities that use your new employee menu, the values for the following profile options match the names of the personal actions submenus you selected above.

- HR:Personal Actions Menu
- HR:Contingent Worker Personal Actions Menu

Menus for Managers

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

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

If you intend that contingent workers use your new manager menu, add the Contingent Worker Personal Actions Menu (or your configured copy) instead of the Personal Actions Menu.

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

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

You must also make sure that, for any responsibilities that use the new manager menu, the values for the following profile options match the names of the manager actions and personal actions submenus you selected above.

- HR:Manager Actions Menu
- HR:Contingent Worker Manager Actions Menu
- HR:Personal Actions Menu

Predefined Self-Service Responsibilities and User Menus

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

In this version of SSHR, the predefined responsibilities are:

- Employee Self-Service
- Manager Self-Service
- HR User Self Service
- New User Registration
- HR Professional
- Payroll Professional
- Contingent Worker Self-Service

The predefined responsibilities for the HR Foundation application are:

- Employee Self Service Foundation
- Manager Self Service Foundation

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

- Workflow User Web Applications
- Preferences

> **Note:** These responsibilities are provided as a starting point only. You should create your own responsibilities and menus using the predefined SSHR responsibilities and menus as examples. Otherwise, your changes may be lost during an upgrade.
>
> See: User Access and Security, page 3- 3

User Menus

SSHR includes several predefined top-level menus:

- Employee Self Service
- Manager Self Service
- HR Professional
- Payroll Professional
- Contingent Worker Self Service
- Employee Self Service Foundation

  Which includes the following functions/submenus:

  - Suspended Actions
  - Personal Actions
  - Employee Enter Process submenu
  - Personal Actions Foundation submenu
  - Professional Details
- Manager Self Service Foundation

  Which contains the following functions/submenus:

  - Suspended Actions Manager
  - Manager Actions Tree View
  - Manager Enter Process submenu
  - Manager Actions Foundation
  - Personal Actions Foundation
  - Manager Professional Details

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

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

You can also use the following menu for administration purposes:

- HR Web Administrator

See: Self-Service Menus, page 3- 9

Navigation Options for Functions

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

Legislation-specific Menus

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

See: Self-Service Menus, page 3- 9

SSHR User Accounts

Batch Creation of User Accounts

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

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

> **Note:** The creation of users with effective dates in the future is not supported.

The concurrent programs are:

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

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

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

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

Features of the Create Batch Users Process

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

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

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

Creating Batch User Accounts with Concurrent Programs

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

See: Writing User Hooks to Create Batch User Accounts, page 3-18.

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

You run the concurrent programs from the Submit Requests window.

To create batch user accounts with concurrent programs:

1. Run the User Account Employee Extract Process

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

2. Run Data Pump Engine

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

3. Submit Data Pump Batch Exceptions Report

   This program reports errors in the Data Pump Engine.

User Account Employee Extract Process

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

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

The specific views tailored for the hr_user_acct_api are:

- hrdpv_create_user_acct

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

- hrdpv_update_user_acct

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

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

To run the user account employee extract process:

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

defaults to SYSDATE. This parameter sets the start date from which the records are extracted

- End Date

  defaults to SYSDATE. This parameter is used in conjunction with the start date parameter to set a date range for the extraction of the records

4. Enter the following organization input parameters:

   - Organization

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

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

   - Organization Hierarchy

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

   - Organization Hierarchy Version

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

   - Parent Organization

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

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

   - Create User Account for New Hires

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

   - Create User Accounts for All Employees

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

   - Inactivate User Account for Terminated Employees selects all employees terminated between the start date and end date parameter within the organization or organization hierarchy. Once selected, the user account for the terminated employee or worker is end dated. This run type is used on an ongoing basis to end date accounts for terminated employees and workers within the date range.

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

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

Data Pump Engine

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

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

To run the Data Pump Engine concurrent program:

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

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

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

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

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

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

See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*

Employee Data Pump Exceptions Report

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

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

To run the Data Pump Batch Exceptions report:

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

   > **Note:** You can run the Data Pump Engine and Data Pump Batch Exception Report processes in sequence. See: Overview of Concurrent Processes, *Oracle Applications Systems Administrator's Guide*

See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*

Writing User Hooks for the Batch Creation of User Accounts

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

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

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

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

To set up the prerequisites for writing user hooks:

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

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

   > **Note:** If you plan to use security groups in a responsibility defined for use in Oracle Self-Service Web Applications, or plan

to create a new responsibility for use in Oracle Self-Service Web Applications, set the Enable Security Groups profile option at the application level: Oracle Self Service Web Applications.

3. Set up a guest user account in Oracle Applications by setting the GUEST USER PASSWORD profile option. This must be in the format <username/password>. You can obtain and verify the guest user account with your Database Administrator.
4. Use the Define System Profile Option Value in System Administrator responsibility to set a security profile at Site or Application level. This is necessary because security profile option values can be set at Responsibility or User level with the batch process.

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

   See: API User Hooks, *Oracle HRMS Implementation Guide*

   See: Sample Code, *Oracle HRMS Implementation Guide*

Tables Updated in the Batch Process

The batch process inserts records into the following FND tables:

- FND_USER
- FND_USER_RESP_GROUPS

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

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

  stores the translated value of responsibility name
- FND_RESP_FUNCTIONS

  if the new responsibility has function exclusion rules
- FND_PROFILE_OPTION_VALUES

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

  if security groups are enabled.

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

- FND_USER
- FND_RESP_GROUPS

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

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

- FND_USER_RESP_GROUPS

- FND_RESPONSIBILITY_TL

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

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

- FND_PROFILE_OPTION_VALUES

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

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

   - hr_user_acct_api

   This API contains two procedures:

   - hr_user_acct_api.create_user_acct

     used to create a new user

   - hr_user_acct_api.update_user_acct

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

To set up the Create User API procedure:

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

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

   - hr_user_acct_bk1.create_user_acct_b

     before-process hook point

   - hr_user_acct_bk1.create_user_acct_a

     after-process hook point

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

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

2. Write a PL/SQL program for the after-process hook if you leave the API to generate a password. The program must save the password of the new user account to a file that can be accessed by a system administrator. This is necessary because the password created by the API is encrypted when it is saved to the FND_USER table in the database. You must capture the password before it is encrypted so that you can notify employees of their initial password.

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

To set up the Update User API procedure:

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

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

- hr_user_acct_bk2.update_user_acct_b

  before process hook point

- hr_user_acct_bk2.update_user_acct_a

  after process hook point

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

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

To carry out the remaining steps:

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

   See: API User Hooks, *Oracle HRMS Implementation Guide*

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

   Sample code

```
DECLARE

 ln_api_hook_call_id NUMBER;

 ln_object_version_number NUMBER;

 ln_api_hook_id NUMBER;



  BEGIN



 -- get api_hook_id for the seeded before process user hook packag
e procedure

 SELECT ahk.api_hook_id

 INTO  ln_api_hook_id

 FROM  hr_api_hooks ahk

   ,hr_api_modules ahm
```

```
WHERE ahm.module_name = 'CREATE_USER_ACCT'

AND ahm.api_module_type = 'BP'

AND ahk.hook_package = 'HR_USER_ACCT_BK1'

AND ahk.hook_procedure = 'CREATE_USER_ACCT_B'

AND ahk.api_hook_type = 'BP'

AND ahk.api_module_id = ahm.api_module_id;


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


hr_api_hook_call_api.create_api_hook_call(

 p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

 p_api_hook_id   => ln_api_hook_id,

 p_api_hook_call_type => 'PP',

 p_sequence   => 1,

 p_enabled_flag  => 'Y',

 p_call_package  => 'MY_USER_ACCT', -- your custom package name

 p_call_procedure => 'CREATE_USER_ACCT_B', -- your custom package
procedure name

 p_api_hook_call_id  => ln_api_hook_call_id,

 p_object_version_number => ln_object_version_number

);



-- get api_hook_id for the seeded after process user hook package
procedure

SELECT ahk.api_hook_id

INTO  ln_api_hook_id

FROM  hr_api_hooks ahk

  ,hr_api_modules ahm
```

```
WHERE ahm.module_name = 'CREATE_USER_ACCT'

AND ahm.api_module_type = 'BP'

AND ahk.hook_package = 'HR_USER_ACCT_BK1'

AND ahk.hook_procedure = 'CREATE_USER_ACCT_A'

AND ahk.api_hook_type = 'AP'

AND ahk.api_module_id = ahm.api_module_id;



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

hr_api_hook_call_api.create_api_hook_call(

 p_effective_date => to_date('02/02/2000', 'DD/MM/YYYY'),

 p_api_hook_id   => ln_api_hook_id,

 p_api_hook_call_type => 'PP',

 p_sequence   => 1,

 p_enabled_flag  => 'Y',

 p_call_package  => 'MY_USER_ACCT',

 p_call_procedure => 'CREATE_USER_ACCT_A',

 p_api_hook_call_id  => ln_api_hook_call_id,

 p_object_version_number => ln_object_version_number

);


 EXCEPTION

when others then

 dbms_output.put_line('Error in seeding user hook procedures: ' |
| sqlerrm);

 END;


 /

 commit;
```

```
exit;
```

Execute User Hook Pre-Processor

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

```
 SELECT api_module_id

 ,api_module_type

 ,module_name

FROM  hr_api_modules

WHERE module_package = 'HR_USER_ACCT_API';
```

You should see results similar to those below:

```
API_MODULE_ID API_MODULE_TYPE     MODULE_NAME

--------------------------------------------------------

     383 BP                       CREATE_USER_ACCT

     384 BP                       UPDATE_USER_ACCT
```

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

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

3. Enter any new message text for the messages that you issue in your custom package when you have run the pre-processor program. Use an Application Developer responsibility in Oracle Applications to create your message text.
4. Ensure you have set the application level correctly if you use security groups to manage security profiles. For example, in SSHR you must set the application level to Oracle Self Service Web Applications. Set the security profile option to the application level if you need to associate the responsibility with another HRMS application.

   This updates the following tables: per_sec_ profile_ assignments, and fnd_user_resp_groups
5. Make sure that the Enable Security Groups profile option is Yes.
6. Set the Data Pump error parameters. These parameter control aspects of the Data Pump Engine process.

   See: Oracle HRMS Data Pump, *Oracle HRMS Implementation Guide*.

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

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

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

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

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

   See: Creating Batches of Users with Concurrent Programs, page 3-15

4

SSHR and Workflow

Workflow Overview

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

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

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

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

See: Defining Functions for SSHR, page 2- 8

Setting Up Workflow for SSHR

How does Oracle Workflow increase the flexibility of SSHR?

In addition to configuring self-service functions and menus, you can also configure the underlying workflow processes on which SSHR functions are based. You can configure the workflow attributes and process flows to suit the particular requirements of your enterprise.

Can I change the delivered workflow processes for SSHR?

Although Oracle provides a set of workflow processes for SSHR, we recommend that you leave these processes intact and create your own processes if any process changes are required. The Oracle Workflow Builder enables you to copy the delivered processes and modify them to suit your requirements. The delivered workflow processes are within the HRSSA item type. Although you can make changes within this item type, for example, you can create new processes within this item type, the access level security provided by the Workflow Builder ensures that delivered processes are not modified.

How can I use the Workflow Builder to create new processes?

You can use the Workflow Builder to create new processes by chaining together separate modules. For example, the Manage Employment Events modules can be chained together as required to create a custom workflow process.

Workflow processes often create redundant transaction information. Are there any cleanup procedures?

Yes. Oracle provides a workflow cleanup process which clears any redundant transaction data from temporary tables. Such data is created if the system crashes, or if a user ID is removed or disabled, for example.

Does Workflow generate automatic notifications?

Yes. When Oracle Workflow executes specific events, it generates workflow notifications for specified users, or roles. For example, a manager may receive notification of a training enrollment or salary increase, where the manager must approve the event. Alternatively, a user may receive a notification purely for information purposes, for example, as confirmation that a change to personal details has been submitted to the database.

SSHR and Workflows

Self-Service Workflows

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

For more information on the Workflow Builder, see Overview of Oracle Workflow for Users, *Oracle Workflow Users Guide*

Approvals Processes

You also use the Workflow Builder to configure your approvals processes. For more information, see: Approvals, page 6- 3

Access Roles and Workflow

You use access roles to determine whether a user has permission to update and approve self-service transactions. If a function is marked for approval in the Workflow Builder, SSHR submits the transaction to the automated approval process (AME or Dynamic Approvals). The approvers then receive a notification in their Worklist with a link to open the action. The permissions and privileges defined by the access roles determine whether they can edit, change the effective date, or attach supporting documents to these transactions.

For more information on Access Roles, see Access Roles for Self-Service Actions, page 3- 8

Workflow Objects and Item Types

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

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

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

You update the workflow item type in the Workflow Builder.

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

Workflow Access Levels:

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

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

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

The following table shows typical settings for workflow objects within the HRSSA item type. The customization level of a customizable object is set to the user’s access level at the time when the user customized the object.

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

Notifications

Oracle Workflow generates a workflow notification for a user when the Workflow Engine executes a specific activity within a workflow process. For example, workflow may generate a notification for a manager if a direct report requests leave or enrolls on a training course. This notification may be for information purposes only or may require that the recipient perform an activity, for example, approve a transaction.

For more information on workflow notifications, see: Overview of Notification Handling, *Oracle Workflow User’s Guide*.

All the required information appears in the notification message, regardless of how the user receives the information (for example, in an E-mail or using SSHR). The information includes details of the transaction along with personal information and approval information. In addition, changed information is highlighted with a blue dot, enabling you to easily see which information has changed in the self-service transaction. The format and content of the workflow notifications are essentially the same as the Review page.

> **Note:** A self-service user can receive notifications as e-mails by setting the Notification Preferences in the User Preferences web page. To enable E-mail delivery of notifications, the workflow administrator must set up a notification mailer.

For more information, see Reviewing Notifications via Electronic Mail, *Oracle Workflow User's Guide*

From the notification you can select the Printable Page button to display the information in a format suitable for printing. If enabled, you can use the Generate Document link in the Related Applications region to generate a pdf version of the document.

See: Document Manager, page 7-19

Note: The Generate Document link is not available from E-mail notifications.

Accessing Workflow Notifications

SSHR users access their notifications using one of the following methods:

- Using the Workflow User Web Applications responsibility.
- Using the All Actions Awaiting My Attention function from the Manager, Professional, Employee or Worker responsibilities.
- As an E-mail sent to the user's inbox.

Note: The worklist may also contain additional system-generated notifications.

Personalizing Notifications

You can use the Personalization Framework to configure the notifications to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see:

- Configuring Web Pages, page 5- 3
- Adding Instructions to Web Pages, page 5-22

If you personalize your notification regions by selecting the Personalize Page link and setting the scope of the personalization to the appropriate page value, the changes are only applicable to the specific Notification page and E-mail page. If you select a shared region as the personalization scope, the personalizations are replicated in the other pages that use this shared region.

Notification Messages

The following table provides a list of messages used within workflow notifications.

Note: The table only contains the messages that have changed with SSHR 11.i.10.

	Message	Display Name
HR_TRANSFER_TO_APPRAISEE_MSG	HR_EMBED_APPR_TRANSFER_MSG	Notify Appraisee on Appraisal Transfer
HR_APPRAISAL_COM_APPRAISEE_MSG	HR_EMBED_APPRAISEE_MSG	Notify Appraisee of Appraisal Complete (New)
HR_APPRAISER_MSG	HR_EMBED_APPRAISER_MSG	Notify Appraiser (New)
HR_MAIN_APPRAISER_MSG	HR_EMBED_MAIN_APPRAISER_MSG	Notify Main Appraiser (New)
HR_NEW_MAIN_APPRAISER_MSG	HR_EMBED_NEW_MA_MSG	Notify New Main Appraiser (New)
HR_APPRAISAL_OTHER_PARTIC_MSG	HR_EMBED_OP_MSG	Notify Other Participant (New)
HR_PART_TO_MAIN_APPRAISER_MSG	HR_EMBED_PART_TO_MA_MSG	Notify Main Appraiser on Participation Completion
HR_APPRAISAL_REVIEWER_MSG	HR_EMBED_REVIEWER_MSG	Notify Reviewer (New)
HR_NOTIFY_PAYROLL_CONTACT_MSG	HR_EMBED_NTF_PAY_CONTACT_MSG	Notify Payroll Contact of Salary Basis Change (Embedded)
HR_NOTFY_APPROVER_MSG	HR_EMBED_RN_NTF_APPR_MSG	Notify Approver (Embedded)
HR_ON_APPROVAL_NOTIFY_HR_REP	HR_EMBED_ON_APPR_NTFY_HR_REP	On Approval Notify HR Representative (Embedded)
HR_V5_RFC_INITIATOR	HR_EMBED_V5_RFC_INITIATOR	Return for correction (Initiator-Embedded)
HR_V5_RFC_OTHER	HR_EMBED_V5_RFC_OTHER	Return for correction (Other than Initiator - Embedded
HR_TXN_ERROR_MSG	HR_EMBED_TXN_ERROR_MSG	Transaction Error Message (Embedded)
HR_NOTIFY_ONSUBMIT_FWD_MSG1	HR_EMBED_NTF_ONSUBMIT_FWD_MSG1	Notify Reviewer Onsubmit (Embedded)
HR_V5_SFL_INITIATOR	HR_EMBED_SFL_INITIATOR	V5.0 Saved for Later (Initiator - Embedded)
HR_V5_SFL_OTHER	HR_EMBED_SFL_OTHER	V5.0 Saved for Later (Other than Initiator - Embedded)
HR_CREATOR_COMMAPPLERR_V4_MSG	HR_EMBED_INIT_COMMAPPLERR_MSG	Commit Application Error To Creator V4.0 Embedded

	Message	Display Name
HR_CREATOR_ COMMSYSERR_V4_MSG	HR_EMBED_INIT_SYSAP PLERR_MSG	Commit System Error To Creator V4.0 Embedded
HR_DEPART_COMMAP PLERR_V4_MSG	HR_EMBED_DEPT_COMMA PPLERR_MSG	Commit Application Error To Department V4.0 Embedded
HR_DEPART_ COMMSYSERR_V4_MSG	HR_EMBED_DEPT_SYSAP PLERR_MSG	Commit System Error To Department V4.0 Embedded

If required, you could use the Workflow Builder to replace the new message with a custom message.

See: Messages, *Oracle Workflow Developer's Guide*

Configuring Workflow Objects

Before you make changes to workflow objects:

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

   See: Workflow Objects and Item Types, page 4- 3
5. Deselect the Allow Modifications of Customized Objects check box.
6. Select and display the Human Resources Self-Service Applications item type. Save it to a local file for backup.

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

To modify delivered workflow objects:

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

   > **Note:** Some item attributes can be customized and other objects, such as processes, notifications, messages, and lookup types, are "read-only". You can change the "customizable" attributes directly in the workflow process. In SSHR item types, the only directly configurable objects are item-level attributes (including enterprise e-mail addresses) and dynamic approval levels.
   >
   > See: Defining Your Enterprise's Email Addresses, page 4- 9

See: Configuring Approvals with the Workflow Builder, page 6-12

4. If required, create copies of the read-only objects.

   See: Copying Workflow Processes

5. Save your work.

Copying Workflow Processes

To copy a workflow process:

1. Copy the object and rename it.

   For example, you can copy the FYI Notification Process (FYI_NOTIFICATION_PRC) for use with Self-Service Benefits Enrollments. Make sure the new process has the same item type as the original process.

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

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

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

4. Save your work.

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

   See: Defining Functions for SSHR, page 2- 8

After applying a patch:

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

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

Configuring Workflow Attribute Values

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

You configure workflow attributes in the Workflow Builder.

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

See: Self-Service Workflows, page 4- 3

To configure workflow attributes:

1. Open Workflow Builder.
2. If necessary, create a copy of the workflow process you want to modify.
3. Open the Human Resources Self-Service Applications Item Type or the HR Self-Service Benefits Item Type depending on which Item Type you want to modify.

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

Configuring Workflow Error Processes

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

To configure a workflow error process:

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

Defining Your Enterprise's Email Addresses

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

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

To change email addresses:

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

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

5. Save your work.

Running the Workflow Cleanup Process

The workflow cleanup process enables you to remove workflow processes that are left running if a system crashes or a user ID is disabled or removed. The process cleans up temporary tables by removing redundant transaction information. You can specify which transactions are queried by the process by setting the Transaction Status parameter.

You run the cleanup process by running the concurrent program Complete Defunct HR Workflow Processes from the Submit Request Set window.

Before you run the cleanup process, you must define a request set that runs the Purge Obsolete Workflow Runtime Data (FNDWFPR) concurrent program before the Complete Defunct HR Workflow Resources (HRWFDFCT) concurrent program.

> **Note:** From SSHR 4.1, the Complete Defunct Workflow Processes concurrent process is registered under Oracle Human Resources instead of Oracle Self-Service Web Applications. If you previously scheduled this concurrent process to run when still registered under Oracle Self-Service Web Applications, you must cancel the process and resubmit it using the new Complete Defunct HR Workflow Processes registered under Oracle Human Resources.
>
> See:Concurrent Programs Window, *Oracle Applications Developer's Guide*
>
> See: Overview of Concurrent Programs and Requests, *Oracle Applications System Administrator's Guide*

To run the request set:

1. In the Request Set field, enter the name of your request set.
2. Place your cursor on the Parameters field in the row for the Purge Obsolete Workflow Runtime Data process to open the Parameters window.
3. Select the item type for which you want to remove obsolete workflow runtime data. If you leave the field blank, the process will purge obsolete data for all item types.
4. If applicable, enter an item key.
5. Enter the number of days for which you want to run the process. For example, if you want to purge obsolete data for the last 7 days, enter 7.
6. Select the persistence type of the data to be purged (Temporary or Permanent).
7. Choose OK to close the Parameters window.
8. Place your cursor on the Parameters field in the row for the Complete Defunct HR Workflow Processes process to open the Parameters window.
9. Select the item type to be included in the process.

10. Enter the number of days for which you want to run the process. For example, if you want to run the cleanup process for the last 7 days, enter 7.
11. Select the transaction statuses to be queried in the program. The permitted values for the transaction status parameter are as follows:

Transaction Status Values

Parameter Value	Description
ALL	All transaction statuses are queried in the program.
C	Transaction returned for correction (in modules with SSHR V4.x and earlier)
RO	Transactions returned to approver for correction
ROS	Transactions returned to approver for correction and saved for later
RI	Transactions returned to initiator for correction
RIS	Transactions returned to initiator for correction and saved for later
D	Deleted transactions
E	Transactions with errors
N	Transactions initiated but not submitted for approval
S	Transactions saved for later
W	Transactions in progress

12. Choose the Submit button.

5

SSHR Page Layouts

Page Layout Overview

The OA (Oracle Applications) Personalization Framework, a component of the OA Framework, enables you to modify the appearance and behavior of self-service pages. You can customize your web pages in line with corporate standards and data requirements, and streamline your self-service process flows to reflect working practices.

Meta Data Services Repository

The MDS (Meta Data Services) Repository stores the base page definitions for self-service pages and you can create personalizations are which are stored separately from the base page definitions. Your personalizations are preserved during upgrades because upgrades only affect the base page definitions.

For more detailed information on the OA Framework and the OA Personalization Framework, please see the following documentation:

Overview of Oracle Self-Service Web Applications, *Oracle Self-Service Web Applications Implementation Manual*

Oracle Applications Framework Release 11i Documentation Roadmap(Metalink Note # 275880.1)

For more information on using the Personalization Framework with SSHR, see: Configuring Web Pages, page 5-15.

Setting Up Page Layouts for SSHR

How does the Personalization Framework improve the flexibility of self-service functions?

The Personalization Framework enables you to modify the delivered SSHR web pages to suit the requirements of your enterprise. For example, you can include a company logo on a page or hide/show particular fields. You can also restrict the information displayed to a user and define how information is entered by adding radio buttons, flexfields, lists of values, and read-only fields. You can also configure the sequence of pages and reorder regions and region items to better suit the requirements of your enterprise.

Can anyone use the Personalization Framework?

For security reasons, not everyone has access to the Personalization Framework functionality. You control access to the Personalization Framework using profile options. If the profile options are set for your user or responsibility, you can access the Personalization Framework.

See: The Personalization Framework, page 5- 3 .

How does the Personalization Framework improve security in my enterprise?

The Personalization Framework can control the data that is displayed to a user on a self-service page and can restrict the functions that a user can perform, for example, by defining fields as read-only.

Can I control approvals?

Yes. You can use SSHR with Oracle Approvals Management (AME) or use standard and dynamic approvals to determine how managers and HR professionals approve self-service transactions.

Can I use the Personalization Framework to provide instructions to SSHR users?

Yes. You can use the Personalization Framework and Oracle HRMS to create long or short messages for your SSHR users. You can also create field text to assist users when entering data in particular fields. You can replace delivered instructions and messages or add text to items or regions that are delivered without text.

Can I use the Personalization Framework to configure notifications?

Yes. If your system administrator has enabled the Personalization Framework functionality, you can configure notifications to suit your requirements. You can specify whether notifications are delivered using e-mail or using Oracle Workflow, or use both delivery methods.

Can I add objects or content to my SSHR pages?

Yes. With OA Framework 11.i.10 you can add new items and objects. Available items include flexfields, buttons, tips, and messages.

See: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note #275880.1)

Can I change the flow of self-service pages?

Yes. You can take advantage of the extensibility functions offered by the OA Framework and change your process logic to suit your business requirements. You can change the sequence of self-service pages and add additional pages and regions if required.

For more information on using the Personalization Framework with SSHR, see: Configuring Page Layouts, page 5-15

SSHR Personalizations

The Personalization Framework

Oracle Applications Framework (OAF) technology (which includes the Personalization Framework) enables you to configure web pages for distinct audiences. For example, you can create one set of personalizations for a line manager and one set for an employee. Alternatively, you may personalize a self-service page differently for localizations, organizations, and sites. To enable this flexibility, the OA Framework provides two levels of personalization privileges: *administrator* level and *end-user* level. Administrators can choose to create personalizations at a number of different levels, for example, at the responsibility, site, or function level. These levels are arranged in a hierarchy where lower level personalizations take precedence over higher level personalizations.

See: Personalization Framework Hierarchy, page 5- 3

Users can create personalizations for specific regions and items, for example, a user can hide or display particular columns in a table. A user can also personalize a portlet to hide or display particular information. User personalizations are only seen by the creating user.

Personalization Framework Hierarchy

Configure web pages for different audiences by creating personalizations at different levels. This list shows the available personalization levels (with an example of a typical personalization):

Administrator Level Personalizations

Personalization Level	Example
Function	Make certain fields read-only for particular functions.
Localization	Rename or hide fields for a particular localization.
Site	Define a table format for your site.
Organization	Add a corporate logo to all web pages used by your organization.
Responsibility	Add display or hide a flexfield for a responsibility.
Admin-seeded end user	Create default views for your users.

User Level Personalizations

Personalization Level	Example
Portlet	Personalize the portlet to display news headlines.
User	Create personalized views for tables.

> **Note:** The lower level personalizations, for example, user-level personalizations, take precedence over the higher level personalizations, for example, site-level personalizations.
>
> Not all personalization levels may be available for your self-service application. For example, for iRecruitment, use only site and responsibility levels.

To enable administration-level personalizations, the system administrator sets the personalization profile options for the user in question. The user then logs on to the self-service application and selects a responsibility. If the profile options are set correctly, the user sees the Personalize Region and Personalize Page links on the web page. By clicking on these links, the user can customize the page to the level required.

For a complete list of typical administration-level personalizations, see: *OracleApplications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

To enable user-level and portlet personalizations, the system administrator defines region items as user-configurable by using the User Personizable attribute in the Personalization Framework. For user and portlet-level personalizations, this attribute generally applies to tables. If a table can be personalized, you can define *views* for the table. For example, you can hide or display columns, filter data, select the number of rows to display, and define searches. You can then select the required view from a drop-down list. You can also define a default view.

Personalization and Extensibility

Enhanced extensibility functionality enables you to add new functionality and override or extend the delivered business logic. For example, you can add new pages to a functional flow or add new items, such as a field, to a delivered page.

For more information on extending SSHR in this way, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1)

Function-Level Personalizations

Some delivered SSHR functions include function-level customizations which you cannot update or delete. Currently, the following functions include function-level personalizations:

- Change Cost Center, Location and Manager
- Change Cost Center, Terms and Manager
- Change Job
- Change Job and Terms

- Worker Status Change
- Change Worker Status and Terms
- Hire/Applicant Hire/Contingent Worker Placement
- Termination
- Termination with Compensation
- Transfer

See: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

To personalize one of the above functions, you can either make the personalizations at the site or responsibility level (and override the delivered function-level personalizations) or you can create a copy of the function and make your own personalizations accordingly. However, if you prefer to work with your own custom functions rather than the delivered functions, you should be aware that you will lose any delivered function-level personalizations.

See: Defining Functions for SSHR, page 2- 8

See: Function-level Personalizations, page 5- 6

Configurable Profile Options

The following table lists the configurable profile options used with the Personalization Framework.

Profile	Configurable Levels	Values	Default
Personalize Self-Service Defn (FND_CUSTOM_OA_DEFINITION)	Site, Responsibility, User	Yes/No	No
FND: Personalization Region Link Enabled (FND_PERSONALIZATION_REGION_LINK_ENABLED)	Site, Application, Responsibility, User	Yes/No	No
Disable Self-Service Personal (FND_DISABLE_OA_CUSTOMIZATIONS)	Site, Application, User	Yes/No	No

Personalize Self-Service Defn

This profile option enables or disables the global Personalize Page link that appears on each self-service web application page. This profile option must be set to enable personalization at the administrator level. When an administrator displays the Page Hierarchy personalization page from the Personalize Page link, the administrator must navigate to the region or item to be personalized by expanding the hierarchy.

FND: Personalization Region Link Enabled

This profile option enables the Personalize Region link above each region in a SSHR web page. You can set this profile option *in addition to* the Personalize Self-Service Defn profile option. The advantage of setting this profile option is that the Page Hierarchy personalization page focusses on the specific region and the administrator does not have to expand the branches of the hierarchy.

Disable Self-Service Personal

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

Function-level Personalizations

Oracle delivers a number of SSHR processes with function-level personalizations. If you copy of one of these processes to create your own version, you lose the function-level personalizations.

The following tables show which personalizations are included in the delivered processes, so you can replicate them if you require. The tables show where the behavior of a region item for a particular process is different than in a standard module. For example, for the Change Job process, the Department item, which is normally displayed in the Assignment page, is hidden. Any region item not included in this table behaves in the default way.

See: Function-level Personalizations, page 5- 3

Function Name	Region Name	Hidden Region Items	Displayed Region Items
Change Job (HR_ CHANGE_JOB_SS)	Assignment	HRInstruction Department Position Grade People Group Assignment Status Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Location	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	
Change Job and Terms (HR_CHANGE_JOB_TERMS_SS)	Assignment	Department	
		Position	
		Grade	
		People Group	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Department Name	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Location	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
Change Cost Center, Location and Manager (HR_CHG_COST_ LOC_SUP_SS)	Assignment	HRInstruction Job Position Grade People Group Assignment Status Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Job Title Location Employee is a Manager Normal End Time People Group Key Flex Performance Review Period Performance Review Frequency Position Name Salary Basis Salary Review Frequency Salary Review Period Work Hours Additional Information Payroll Name	
Change Cost Center, Terms and Manager (HR_CHG_COST_TRM_LOC_SUP_SS)	Assignment	Job Position Grade People Group Assignment Status Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Job Title	
		Location	
		Employee is a Manager	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Performance Review Period	
		Performance Review Frequency	
		Position Name	
		Salary Basis	
		Salary Review Frequency	
		Salary Review Period	
		Work Hours	
		Additional Information	
		Payroll Name	
Employee Status Change (HR_EMP_STATUS_CHG_SS)	Assignment	Position	
		Grade	
		Assignment Status	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Location Normal Start Time Normal End Time Position Name Work Hours Additional Information Payroll Name	
Change Worker Status and Terms (HR_EMP_TERMS_CHG_SS)	Assignment	Position Grade Other Assignment Information Statutory Information Payroll Salary Information Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason	
		Assignment Flex	
		Assignment Status	
		Ceiling Point	
		Ceiling Step	
		Employee Category	
		Employment Category	
		Establishment Name	
		Frequency	
		Grade Name	
		Location	
		Normal End Time	
		Normal Start Time	
		People Group Key Flex	
		Position Name	
		Work Hours	
		Additional Information	
		Payroll Name	
Transfer (HR_ TRANSFER_SS)	Assignment	Position	
		Grade	
		Other Assignment Information	
		Statutory Information	
		Payroll	
		Salary Information	
		Location	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Employment Category Establishment Name Frequency Grade Name Location Normal End Time Normal Start Time Performance Review Period Performance Review Frequency Position Name Salary Basis Salary Review Frequency Salary Review Period Work Hours Additional Information Payroll Name	
Termination with Compensation (HR_TERMINATION_COMP_SS)	SSHR Process People	PerInfo Header Assignment Selection	
Termination (HR_TERMINATION_SS)	SSHR Process People	PerInfo Header Assignment Selection	
Hire (HR_NEWHIRE_SS)	Assignment	Position Grade Assignment Status	

Function Name	Region Name	Hidden Region Items	Displayed Region Items
	Assignment Review	Change Reason Assignment Flex Assignment Status Ceiling Point Ceiling Step Employee Category Establishment Name Grade Name Position Name	
	Basic Details Review	Effective Date Employee Number Disability Code Full Name Effective Date Full Name	Hire Date Gender Person Type Hire Date Gender
	Employment Type	Date of Last Change	
	Main Address Update	Effective Date	
	Main Address Review	Effective Date	
	Other Assignment Information	Assignment Flex Employee Category	
	Other Employment Information	Configurable Pay Info	
	PayRate Misc Fields Table	Changed On Last Pay Change	

Configuring Web Pages

The Oracle Applications Framework functionality enables you to personalize and extend the predefined web pages and web page regions to suit your business requirements. For example, you can hide or display particular fields or arrange fields or pages in a more appropriate sequence. Alternatively, you can add instruction text to your web pages or to add a company logo. You can carry out all these configuration activities using the Personalization Framework.

> **Note:** You cannot hide fields from display if they are mandatory or required for user input.

For overview information, see: The Personalization Framework, page 5- 3 .

For more detailed information, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1)

1. Make sure that you are using a responsibility with administration-level personalization access.

   See: The Personalization Framework, page 5- 3

2. Navigate to the web page you want to configure.
3. Click the Personalize Page link for the web page or the Personalize Region link for a specific region.

   The Choose Personalization Context page appears, displaying the following personalization levels:

   > **Note:** If applicable, you can populate these fields with the values for you (as the person logged on) by clicking on the Set to My ... button.

   - Scope

     This is the name of the region or page that you are personalizing. You can switch to a different region within the page by selecting a value from the list.

   - Function
   - Location
   - Organization
   - Responsibility
   - Site

   > **Note:** When you define the personalization context, you should take care to consider the personalization hierarchy. For example, if you personalize a function and only enter a value in the Function field, the personalizations are also applicable if the function is used elsewhere, for example, with other responsibilities. If you only select a value in the Responsibility field, the personalizations are only applicable to that responsibility.
   >
   > See: Personalization Framework Hierarchy, page 5- 3
   >
   > Similarly, you should take care when selecting the Scope. If you select the page as the scope and navigate to the required region on the following page, the personalizations only apply to the region in that particular page. However, if you select a shared region in the Scope field, the personalizations are replicated wherever the region appears throughout the application.

4. Click Apply to continue to the next page.

   The Personalize Page or Personalization Region page appears.

   Making Your Personalization Changes

5. The page or region contains a hierarchy (Personalization Structure). If you are personalizing a page, the hierarchy contains all nodes for the page. If you are personalizing a region, the hierarchy contains the region and any subregions. Expand the hierarchy to display the required region.

Tip: If required, you can search for particular styles or items within the page or region by expanding the Search region.

See: Personalizing Page Styles and Items in *Oracle Applications Framework Personalization Guide* (Metalink Note #268969.1).

6. The Personalization Structure table contains links to the personalization functions. Although the content of this table may vary according to the type of element you have selected for personalization, common functions include:

   - Personalize

     Click on this icon to display the Personalization Properties.

     See: Personalization Properties, page 5-17

   - Reorder

     You can change the sequence of regions in a page or items in a region.

     See: Reorder Contents Page, page 5-18.

   - Add Content

     You can add predefined content regions to a selected region.

     See: Add Content Page, page 5-18.

   - Create Item

     You can add items to a selected region.

     > **Note:** You can only add an item at the Site, Localization, or Function levels.

     See: Create Item Page, page 5-19

   - Update Item

     You can update the properties for an item created using the Create Item function.

   - Delete Item

     You can delete an item from a page or region.

   Select the required function.

   Personalization Properties Page

7. If you select the Personalize icon, the Personalization Properties page appears. The properties and functions available vary according to the type of page element you have selected for personalization.

   For more information, see: *Oracle Applications Framework Release 11i Documentation Roadmap* (Metalink Note # 275880.1).

   The personalization properties are arranged in a table. The columns have the following significance:

   - Original Definition

     This shows the base definition as stored in the MDS (Meta Data Services) Repository.

- Columns for personalizations

  The columns displayed depend on the personalization levels you selected for the personalization context. They are displayed in order of precedence (lowest to highest). You can enter a value for each of the available personalization levels. If a field does not contain a personalization, it has the value Inherit. In this case, the field inherits its value from the corresponding field in the preceding column. For example, if you enter the prompt Employee Name for a page element at the function level, you can ensure that the same prompt is used for all subsequent personalization levels by selecting the Inherit value for these levels.

- Result/Source

  This column displays the final personalization.

The rows displayed in the Personalization Properties table also vary according to the page element selected for personalization. The rows relate to the attributes that you can personalize for your page element. Common attributes include:

- Prompt

  Enter a prompt for the page element.

- Rendered

  This attribute determines whether a page element is hidden (False) or displayed (True).

- User Personalization

  This attribute determines whether the page element can be personalized by a user (not an administration-level user).

  > **Note:** You can clear your personalizations for a particular level by selecting a level in the Clear Personalization field.

8. To submit your personalizations, click the Apply button.

   Reorder Contents Page

9. To reorder the items on a page, click on the Reorder icon.

   The Reorder Contents page appears. This page contains a reorder region for each personalization level and also displays the base definition.

10. Select the personalization level at which you want to reorder the items on the page. If you do not reorder the items for a specific level, the level inherits the order from the personalization level above it.
11. Use the arrows at the side of the reorder region to region the page items.
12. To submit your personalizations, click the Apply button.

    Add Content Page

13. To add a content region to a page, click on the Add Content icon.

    The Add Content page appears.

14. Select a predefined content region to add to the page.

    > **Note:** You can only add a content region to a boxed layout region that contains only content regions.

15. To submit your personalizations, click the Apply button.

    Create Item Page

16. To create a new item for your page or region, click on the Create Item icon. To update the properties for an item that you have created using the Create Item page, click on the Update Item icon.

    The Create Item page appears.

17. Select the item type to be created or updated. For example, you can select flexfield, button, or tip.

18. Enter the ID for the new item. This ID should not exceed 30 characters.

    > **Note:** The properties displayed for the new item depend on the type of item you are creating. For more information on the properties that you must enter for each item type, please see: Oracle Applications Framework Release 11i Documentation Roadmap (Metalink Note # 275880.1).

19. To submit your personalizations, click the Apply button.

Configuring Page Headers

Self-service pages often include a header region which provides summary information for the user. Manager self-service pages, for example, usually include headers to provide information such as the employee (or worker) name, employee number, job, and department for the person on whom they are carrying out a transaction.

In SSHR there are two header regions: Person Header and Assignment Header. Each header region contains several fields although some fields are delivered as hidden. In other words, the Rendered attribute for the field is set to False. To display these fields, use the Personalization Framework.

Name Format Personalizations

The Header regions display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Configurable Flexfields

The following tables show which flexfields are included in the Person and Assignment Headers:

Person Header

Flexfield Name	Flexfield Code
Further Person Information	Person Developer DF
Additional Personal Details Flex	PER_PEOPLE

Assignment Header

Flexfield Name	Flexfield Code
Add'l Salary Admin Details	PER_PAY_PROPOSALS
Additional Assignment Details	PER_ASSIGNMENTS

Personalizing Page Headers:

1. Navigate to the page or header region that you want to personalize and choose the appropriate link (Personalize Region or Personalize Page).
2. In the Choose Personalization Context page, select one of the following values in the Scope field:
   - /oracle/apps/per/selfservice/common/webui/SummaryContainerRN

     to personalize the top-level header region containing the Person and Assignment headers
   - /oracle/apps/per/selfservice/common/webui/PersonSummaryRN

     to personalize the Person header
   - /oracle/apps/per/selfservice/common/webui//AsgSummaryRN

     to personalize the Assignment header
3. Make your personalizations.

   See: Configuring Web Pages, page 5-15

   > **Caution:** Be aware that if you personalize the header regions, the changes are reflected throughout the application. In other words, if you personalize the Person header to hide the Contingent Worker Name field, this field will not appear on the Person header regions throughout SSHR.

4. Choose Apply to submit your changes.

Configuring Flexfields

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

See: Overview of Flexfield Concepts, *Oracle Applied Technology Guide*

If the self-service function you are using has flexfields enabled, you can access them using the Personalization Framework. The flexfields are not automatically displayed so you can choose to hide or display the flexfields using the Personalization Framework. However, not all self-service functions use flexfields. For a list of the available flexfields for each self-service function, please see the corresponding functional description in this Implementation Guide.

> **Note:** It may be the case that flexfields available in the Professional Forms Interface are not available in SSHR.

You can also add flexfields to regions of your web pages using the Personalization Framework.

To modify the flexfields displayed in a region:

1. Select the region.
2. Configure the region by choosing the Personalize Region link.

   #### To personalize existing flexfields

   1. Expand the hierarchy structure and click Personalize to open the Personalization Properties page.
   2. To hide or display a flexfield, change the value in the Render column to True (to display the flexfield) or False (to hide the flexfield).
   3. To display all flexfield segments, leave the Flex Segment List field blank. To display only selected segments, enter the segments in the Flex Segment List using the following format:

      context1|segment1|segment||context2|segment 1

      For example,

      Global Data Element|New Employer|Address||US|Zip Code
   4. Click Save to submit your changes.

   #### To add new flexfields to a region or page

   1. Select the region to which to add the flexfield.
   2. Select Create Item.
   3. Select the item style Flex.

      The appropriate fields for this item style appear. For information on populating the individual fields, see: *Oracle Applications Framework Personalization Guide* (Metalink Note # 268969.1).
   4. The Segment List field determines how the segments for your flexfields are displayed on the web page. To display all flexfield segments, leave the Segment List field blank. To display only selected segments, enter the segments in the Flex Segment List using the following format:

      context1|segment1|segment||context2|segment 1

      For example,

      Global Data Element|New Employer|Address||US|Zip Code
   5. Click Save to submit your changes.
3. Choose Apply to save your personalizations.

Configuring Tabbed Regions

Tabbed regions appear on several SSHR web pages, for example, the Benefits Self Service page includes the Benefits Enrollments and Current Benefits tabs. The self-service Views functions also use tabbed regions.

The following submenus contain tabbed regions:

HR Professional Menu (HR_PROF_SELF_SERVICE_V4.0)

Which contains the following tabbed regions:

- HR Views (HR_VIEWS_MENU)
    - Search function
    - HR Views Submenu (HR_VIEWS)

      Which contains the following tabbed regions:

        - Employee Information View
        - Assignment Information View
        - Compensation Activity View
        - Termination History View
- Search function

Benefits Self Service (BEN_SELF_SERVICE_BENEFITS)

Which contains the following tabbed regions:

- Benefits Enrollments function
- Current Benefits function

See also: Setting Up Self-Service Benefits Web Pages, page 10-26

Some tabbed regions include a subset of buttons. To remove buttons from display, you exclude the functions (buttons) at responsibility level.

To remove a tabbed region or button from display:

You can use the following method to remove a tabbed region or button from display:

Set a function exclusion at the responsibility level:

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

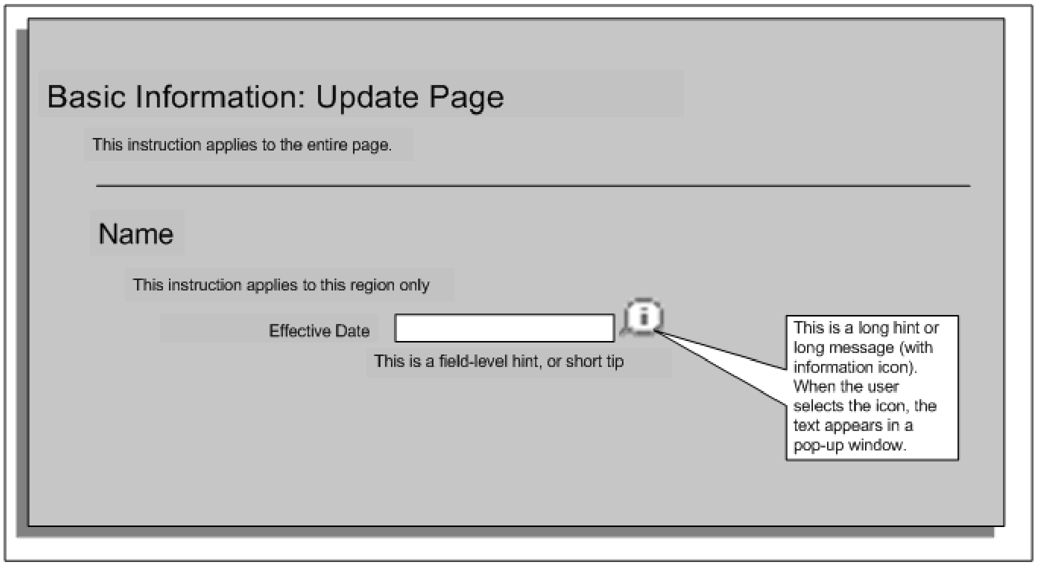
Adding Instructions to Web Pages

You can change the predefined instructions, messages, and tips attached to your web pages to provide relevant information for your users. You can replace delivered texts or create new texts for regions or item delivered without a text attached, using one of three formats:

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

The graphic below illustrates examples of the different types of text:

Instructions, Messages, and Tips on a Self-Service Page



You create texts in the Messages window using the traditional forms interface and add them to your region or item using the Personalization Framework.

To create a new text:

1. Log on to the database using an Application Developer responsibility.
2. Navigate to the Messages window.
3. Enter the name for your message.
4. Select Note as the message type.
5. Enter the application and the message text. You can enter a long message, short message, or tip text.
6. Save your work.

To add a text to a region or item or to replace a delivered text:

This procedure changes slightly depending on the type of text.

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

   Note: To enable configuration, the Personalize Self-Service profile option (FND_CUSTOM_OA_DEFINITION) must be set to Yes at an administration level.

2. Click Personalize Region or Personalize Page.
3. Navigate to the self-service page or region in which you want to change or add a text.

   Then select one of the following options:

   - To add or replace an instruction text, page 5-24
   - To add or replace a tip or long message, page 5-24

To add or replace an instruction text

1. When the personalization structure is displayed, drill down to the region or page element you wish to personalize.

To replace a delivered message attached to a region or page

2. Locate the instruction text. The text usually has the name Static Styled Text: <*name*>.
3. Select the Personalize icon for the item.
4. Replace the value in the Message Name field with a message of your choice.
5. Click Apply to save your changes

To add a new instruction to a region or page

If you are adding an instruction to a region or page that does not contain an instruction text as standard, you need to carry out the following steps:

6. Create a region item with the style staticStyledText.

   See: Create Item Page, page 5-19
7. Enter the ID for the region. This the identifier for the region and should follow naming conventions.

   See: OA Framework File Standards.
8. Set the CSS Class to OraInstructionText.
9. Enter the application short name in the Message Appl Short Name field..
10. Enter the name of the message in the Message Name field.
11. Click Apply to submit your changes.

To add or replace a tip or long message

1. When the personalization structure is displayed, drill down to the region item you wish to personalize.
2. Select the Personalize icon for the region or item.
3. In the Tip Message Name column for the corresponding region, search for your message or tip.
4. In the Tip Type field, select the appropriate format for your text.

   > **Note:** If applicable, you can display a date format example next to a date field. In this case, select dateFormat in the Tip Type field. The OA Framework then automatically displays a date example based on the user's date preference.
5. Click Apply to submit your changes.

Configuring the Global Button Bar

The Global Button Bar comprises the following buttons by default:

- Return to Portal
- Log Off
- Select Preferences

- Email
- Self-Service Help

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

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

To configure a button on the global button bar:

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

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

To remove the global button bar display:

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

   See: Oracle Self-Service Framework Version 5.2.2B (available on Metalink)

Personalizing Screen Images

Oracle delivers self-service functions with a default Oracle image in the upper left corner of the page. This image, together with the header text that identifies the function, is known as *branding*.

You can replace the default Oracle image, with your own image if required. Change the default image in one of two ways: overwrite the default image with an image of the same name or replace the default image with one of your own.

Alternatively, you can add an image to a region or page if required.

The standard size of the branding image and text is *small*. However, if required, you can change the size to *regular* or *medium* by changing the FND: Branding Size profile option value. The profile option settings have the following effect:

- Regular

- the global buttons appear with corresponding icons and links.

- Medium

  - displays global buttons with links and a lower profile product branding image.

- Small

  - results in global buttons with links and low profile product branding text with a small, generic graphic

To overwrite the default image with your own image:

1. Create an image.
2. Save and name the image:
   - FNDSSCORP.gif (Oracle image)
   - PERBRAND.gif (Human Resources image)
   - IRCBRAND.gif (iRecruitment image)
   - LOGO.gif (log-in image)
3. Place the gif in the $OA_MEDIA/<Language> directory.

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

To replace the default image with your own image:

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

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

3. Query the web page regions or page for personalization.
4. The Image URL attribute defines which graphic appears on the web pages. Overwrite the attribute name with the name of your image.
5. Save your work.

To add a image to a page or region:

1. Query the web page regions or page for personalization.
2. Click Create Item.
3. Create an item with the item style Image.

   See: Create Item Page, page 5-19

4. Click Apply to submit your changes.

Configuring the Effective Date Prompts

The effective date prompt appears at the top of most self-service web pages and indicates whether the current transaction is effective as of a specific date or whether the transaction is effective on approval.

The two prompts are as follows:

- Effective Date:

  Appears if you specify an effective date on the Effective Date Options page.

- Effective as of Approval Date

  Appears if you specify on the Effective Date Options page that changes should take effect as soon as approval takes place.

There are two different procedures for configuring these prompts:

To configure the Effective Date prompt:

You configure the Effective Date prompt in the Messages window.

1. In the Messages window, query the following message:

   HR_EFFECTIVE_DATE_PROMPT

   The message body appears in the lower half of the screen.

2. Change the text of the message as required. For more information on creating messages, see: Messages Window, *Oracle Applications Developer's Guide*

   Adding Instructions to Web Pages, page 5-22

3. Save your work.

When you next log on to SSHR to carry out a transaction, your new effective date prompt appears.

To configure the Effective as of Approval prompt:

1. Click either Personalize Page or Personalize Region.

2. Select the Personalization Context.

   For more information, see: Configuring Web Pages, page 5-15.

3. Navigate through the personalization hierarchy to the element Message Styled Text: <*prompt text*> and click Personalize.

4. To change the text for the prompt, enter the required text in the appropriate personalization level field in the Prompt row. For example, to change the text for all selected personalization levels, enter a new text in the first personalization level column, and select the Inherit value for any other personalization levels.

5. Apply the changes and return to the application.

6

Approvals

Approvals Overview

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

All approvals mechanisms used in SSHR follow a basic approval loop. The logic checks whether the current approver is the final approver in the hierarchy. If the current approver is not the final approver, the application fetches the next approver who then receives the approval notification. The next approver can either reject the transaction, approve the transaction, reassign the transaction, or send the transaction for correction to anyone in the approvals chain. The approver may also be able to update the transaction, depending on the system configuration.

See: Configuring Approvals, page 6-12

Setting Up Approvals for SSHR

Does SSHR provide a secure approvals tool?

Yes. Oracle SSHR can use both Dynamic Approvals in the Workflow Builder and Oracle Approvals Management to provide a secure approvals environment.

Why does SSHR use both Dynamic Approvals and Oracle Approvals Management?

Up until SSHR 4.1, Dynamic Approvals was the standard approvals mechanism for SSHR. From SSHR 4.1, however, the delivered functions used Oracle Approvals Management as standard. You can, however, choose to use Dynamic Approvals instead of Oracle Approvals Management by configuring your self-service functions accordingly.

What is the advantage of using Oracle Approvals Management?

Oracle Approvals Management enables you to define business rules to control your approvals processes. You can define conditions, rules, and attributes to define an approvals process to meet the requirements of your enterprise. For example, you could create an approvals process in which approval from a particular user is only required if a salary raise is above a set amount. Alternatively, you could set up an approvals process for a particular business process.

Can the approvals chain be configured to meet my requirements?

Yes. You can configure your approvals processes to include specific approvers or managers. You can also specify that particular users should receive notification of the approval. If you are using Dynamic Approvals, you can still configure your processes using the Workflow Builder.

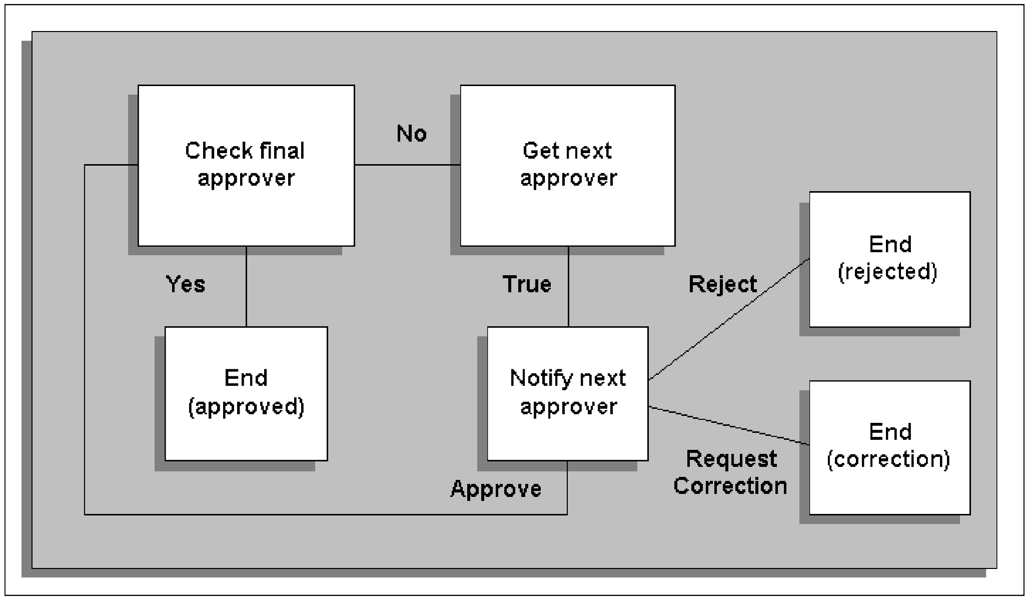
Do I need a separate license to use Oracle Approvals Management?

No. Oracle Approvals Management is included if you purchase any application license.

Approvals

Approvals Processes

The Basic Approvals Loop



Approvals with Correction is the default behavior for modules in SSHR. Within the approvals process, the application uses rules to generate a list of approvers for the SSHR transaction. The way in which the list is generated depends on the approvals mechanism you are using (see Approvals Mechanisms in SSHR).

The default approvals process also includes dynamic approvals as standard. The dynamic approvals functionality works in two parts. One part is the self-service user interface which enables the initiating manager to add additional approvers and/or notification recipients. You can also display the approvers and limit the number of approval levels.

The second part is an application which generates the default approvers. This is either Oracle Approvals Management (AME) or a customizable PL/SQL package. The dynamic approval workflow process then sends notifications to approvers and/or notification recipients based on the approver list.

See: Configuring Approvals, page 6-12

As part of the approvals process, you can choose to enable dynamic approvals by configuring the Review activity for the workflow process in question.

See: Review and Confirm, page 7-13

Allow updates of pending transactions

An approver can update an action themselves, or return an action for correction to any recipient on the approval chain. However, the ability to update depends on two configurations:

- The system profile option HR: Allow Approver Updates to Self Service Actions must be set to Yes.
- The recipient must have a workflow role that allows edits.

To be able to update pending transactions approvers must have a workflow role with the appropriate role type attached to allow them to edit actions. They will then be able to update actions regardless of their position in the approval chain.

There are two supplied role types that control approvers' ability to update pending transactions: SSHR Update Allowed and SSHR Update Not Allowed. These role types should not be used in conjunction with each other; use whichever will be simplest.

- SSHR Update Allowed

  If a role is associated with this role type, then any approver with that role will be able to update a pending transaction. No one else will be able to perform updates on pending transactions.

- SSHR Update Not Allowed

  If a role is associated with this role type, all approvers with that role will be prevented from updating pending transactions; all other approvers will be able to update pending transactions.

Use the Maintain Roles window to associate a role with a role type.

Route actions to HR representative

Actions can be routed to an HR representative. The application will send the action to all persons having a role associated with the seeded HR Representative role type. Use the Maintain Roles window to associate a role with this role type.

The first HR representative to process the action does so on behalf of all HR. This is especially useful in situations where the application encounters a future-dated change to a person's record. See Future-Dated Actions in Managing Dates in SSHR, page 7-16.

Defer Update After Approval

By default, the save of the SSHR transaction to the database is deferred after the final approval. This is to prevent any delay between the final approver clicking the approve button and moving on to the next notification.

The transaction is saved automatically when the Workflow Background Process runs. The system administrator needs to schedule this process to run periodically as needed.

When you run the Workflow Background Process you need to set the following parameters:

- Item Type = HR
- Process Deferred = Yes
- Process Timeout = No
- Process Stuck = No

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

If you need to modify the default behavior so that transactions are saved immediately after final approval, the system profile HR:Defer Update After Approval should be set to No at User/Responsibility/Application/Site level.

See User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Approvals Mechanisms in SSHR

From release 4.1, SSHR uses the Oracle Approvals Management (AME) application to define and manage approval logic. For more information on AME, see: *Implementing Oracle Approvals Management* (available on Metalink).

See: Oracle Approvals Management, page 6- 6

> **Note:** If you are an existing SSHR customer, the customizable PL/SQL package for approvals, which was the default approvals mechanism in previous releases of SSHR, is still supported in this release as an alternative to AME.

See: Customizing Approvals Using PL/SQL, page 6- 8

All delivered SSHR functions from version 4 onwards functions are linked to AME. If required, you can also link any existing custom functions that you may have based on earlier version 4 functions to OAM.

> **Note:** You cannot link SSHR version 3 functions to AME.

See: Configuring SSHR Functions to Use Oracle Approvals Management (AME), page 6-11

Alternatively, you can choose to continue to use the customizable PL/SQL package for new functions, even if they are modeled on later SSHR functions.

For information on configuring and customizing the PL/SQL package and workflow activity for SSHR, see: Customizing Approvals Using PL/SQL, page 6- 8 .

This section provides information on the Oracle Approvals Management (AME) and dynamic approvals, and lists the configuration options for both approval mechanisms.

Dynamic Approvals

The self-service user interface for dynamic approvals has two sections: the Approvals and Notification Recipient sections. The SSHR user can see the path of the transaction by displaying all default approvers who will participate in the approval process. The manager initiating the SSHR transaction can add additional approvers to the approval chain and nominate additional notification recipients (reviewers). The notifications would then be sent to these persons on submission and/or on approval.

The dynamic approvals is default behavior for SSHR functions, however, you can disable the insert approvers/add notification recipients functionality if required by configuring the Review activity for the workflow process.

See: Review and Confirm, page 7-13

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Approvals Process with Correction

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

See: Review and Confirm, page 7-13

Oracle Approvals Management (AME)

Oracle Approvals Management (AME) is a web-based application which is integrated with Oracle Workflow and which enables you to define business rules to control your approvals processes.

With AME, you use the following components to define your approvals processes. They are associated with a transaction type for a particular application.

- Attribute - this is a business variable, for example, a salary amount, user ID, or workflow process name.
- Condition - a condition compares an attribute value with a set of allowed attribute values. For example, a condition could look at a salary amount. If the salary is greater than a specified value, a particular approver list is created.
- Approval type and approval specifications - these components define the type of approver list that is generated. For example, to generate a supervisor-based approver list with 5 levels, you use the ’supervisory level’ approval type with the ’requires approval up to the first 5 approvers’ approval specification.
- Rules - a rule links the other components together by associating one or more conditions with the approval type and approval rule.

For more information on the components used in AME, see: *Implementing Oracle Approvals Management* (available on Metalink).

Default Use of OAM Configuration in SSHR

Oracle SSHR delivers an AME configuration which has been designed to emulate functionality delivered in the PL/SQL package. The default behavior is to use a supervisor-based approvals hierarchy which is now delivered using AME rules.

The default AME configuration consists of:

- a single AME transaction type 'SSHRMS' with
- a single condition WORKFLOW_PROCESS_NAME
- a single rule which requires approvals to the top of the approval hierarchy or to 10 levels above the initiator, whichever comes first.
    - this is based on the standard AME approval type 'chains of authority based on number of supervisory levels'

Configuring SSHR Approval Levels in AME

To meet your business needs, you may add additional rules, conditions, or attributes within the delivered SSHRMS transaction type, or you can define a custom transaction type.

For more information on configuring AME rules, conditions, and attributes, see: *Implementing Oracle Approvals Management* (available on Metalink).

It is relatively easy to make minor changes to the delivered AME configuration and some examples are provided below.

To define a different approval level for all SSHR workflow processes:

- For example, to specify two approval levels: The approval level is currently defined in the rule 'SSHR Rule for at most 10 approvers in Supervisor chain'. You would edit this default rule and change the approval level for the supervisory level approval type to 'requires approval up to the first two superiors at most'.

To define a different approval level for a specific workflow process:

- First you create a new condition with the attribute WORKFLOW_PROCESS_NAME and enter the workflow processes which will have the different approval level as the attribute values.
- Then you create a new rule, for example, '2 approvers in supervisor chain'.
    - Use the 'supervisory level' approval type with the 'requires approval up to the first two superiors at most' approval
    - Finally, attach your new condition to the rule.

To define a new approval level (if the delivered approvals do not meet your requirements):

1. You create a new approval (for example, 'requires approval up to the first 15 superiors at most') in the 'supervisory level' approval type.

To define a particular user as the final approver, or final authority (even if they are not the last person in the approval chain):

- You create a List Modification Condition and specify a user, for example, a manager, as the final approver. You would add this list modification condition to your rules so that the approval chain would stop at this specified approver. Alternatively, you could create a new rule, add the approval type for final approver and add the WORKFLOW_PROCESS_NAME condition so that this final approver rule would apply to selected processes.

For more information on the configuration options offered by AME, see: *Implementing Oracle Approvals Management* (available on Metalink).

For information about function parameters associated with AME, see Supplied Functions, page 2-11

For descriptions of function parameters, see Menu Function Parameter Descriptions, page 2-22

Sample Code for Modifying Approvals Using PL/SQL

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

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

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

```
??-- -Check_final_approver

function check_final_approver

           (p_forward_to_person_id in per_people_f.person_id%type

           ,p_person_id            in per_people_f.person_id%type
)
         return varchar2 is
--
  cursor csr_pa(l_effective_date in date) is

    select  paf.person_id

    from    per_all_assignments_f paf

    start   with paf.person_id = p_person_id

      and     paf.primary_flag = 'Y'

      and     l_effective_date

      between paf.effective_start_date

      and     paf.effective_end_date

    connect by prior paf.supervisor_id = paf.person_id

      and     paf.primary_flag = 'Y'

      and     l_effective_date

      between paf.effective_start_date

      and     paf.effective_end_date;

--

  l_person_id per_people_f.person_id%type := null;
```

```
--
begin
  -- loop through each row. the rows are returned in an order whi
ch makes
  -- the last row selected the top most node of the chain.
  for csr in csr_pa(trunc(sysdate)) loop
    -- set the l_person_id variable to the row fetched
    l_person_id := csr.person_id;
  end loop;
  if p_forward_to_person_id = l_person_id then
    return('Y');
  else
    return('N');
  end if;
exception
  when others then
       return('E');
--
end check_final_approver;
()
- -Get_next_approver
function get_next_approver
           (p_person_id in per_people_f.person_id%type)
         return per_people_f.person_id%type is
--
  cursor csr_pa(l_effective_date in date
               ,l_in_person_id   in per_people_f.person_id%type)
is
    select  ppf.person_id
    from    per_all_assignments_f paf
```

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

```
end get_next_approver;
()
```

For more information on using PL/SQL, see Overview of Using PL/SQL in Applications, *Oracle Applications Developer's Guide*

Configuring SSHR Functions to Use Oracle Approvals Management (AME)

Any custom functions you created prior to release 4.1 will use the customizable PL/SQL package as the default approvals mechanism. However, you can modify any custom SSHR functions to point to AME by adding two new function parameters.

You define the additional parameters in the Form Functions window. You should also check the workflow attributes for your workflow process using the Workflow Builder.

The AME rules and conditions always override any other workflow attribute settings that apply to approvals, for example, the attribute settings for the Review activity. If the Approvals Required workflow attribute is set to Yes for a workflow process but AME does not return any approvers, the process completes without requiring approval. As a general set-up recommendation, you should set up processes that currently do not require approval as follows:

- Set the Approvals Required workflow attribute to Yes
- Configure AME so that no approvers are returned

> **Note:** If you subsequently need to add approvals to your process, you can simply use a different AME condition.

To link your function to AME in the Form Functions window (required):

1. Query your function.
2. Navigate to the Form tabbed region.
3. Add the following parameter information to the Parameters field for your function:
   - pAMETranType=SSHRMS
   - pAMEAppId=800
4. Save your work.

To add your custom workflow process to the list of values for the condition attribute for the SSHRMS AME transaction type (required if using the delivered SSHR transaction type):

1. Log on to Oracle Approvals Management.

   > **Note:** You need to use one of the following AME responsibilities (AME is the Oracle internal abbreviation for AME):
   >
   > - AME Application Administrator
   > - AME General Business User
   > - AME Limited Business User

2. Select the SSHRMS transaction type.

3. Select the Conditions tab and click on the WORKFLOW_PROCESS_NAME condition.
4. Choose the Add Text Value button and enter the name of your new workflow process as an attribute value.
5. Save your work.

To set the Approvals Required attribute in the Workflow Builder:

1. Display your function in the Workflow Builder.
2. Display the attributes for the Review function.
3. Set the Approvals Required attribute to Yes or Yes - Dynamic Approvals.

   Note: To display the Additional Approvers/Notification Recipients page, you must select the Yes - Dynamic Approvals value.

4. Save your work.

Configuring Approvals in the Workflow Builder

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

To configure approvals in the Workflow Builder:

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

   Note: You may have to drill down through several subprocesses until you reach the correct Review Page activity.

4. Make a copy of the process and any affected subprocesses. For example, if you are modifying the approvals for the Process Personal Information process, you would have to copy the Process Personal Information process, and the related subprocesses, for example, the Process Basic Details subprocess.

   See: Updating Workflow Objects, page 4- 3

5. Select the Review Page activity for your process/subprocess and set the Approval Required workflow attribute (HR_APPROVAL_REQ_FLAG) to YES. This activates approval for your process/subprocess.

   Note: The default value varies for different modules.

   See: Review and Confirm, page 7-13

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

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

7. Save your work.

7

Common SSHR Modules

Common Modules Overview

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

The common modules are:

- Enter Process
- Actions Page
- Return for Correction
- Release Employee Information
- Review and Confirm
- Dates
- Save for Later
- Document Manager
- New User Registration

Using Common SSHR Functions

Which common functions does SSHR provide?

SSHR includes a number of common functions which are not associated with any particular area of Oracle HRMS. These functions are useful in the everyday operation of SSHR and are intended to improve your self-service processes. An example of a common function is the Enter Person process which is used in the manager self-service functions to select an employee or worker for a transaction.

Is it always necessary to select the function first and then the employee?

No. If you select the Manager Actions function from the self-service menu, you select your employee or worker first and can then select the required function from a list of all available functions for the person. The list is context-sensitive. If you are an employee or worker, you can select the Personal Actions function from the menu and you can select the required function from a list of available functions. Again, this list is context-sensitive.

Are there any review mechanisms in place?

Yes. Before you submit a transaction to the database (as an employee or manager), you can check your data on the Review page. This page shows a summary of any new or changed information and enables you to make any last-minute changes before submitting the transaction to the database. You can also enter comments for approvers in this page.

Is there any way to provide approvers with additional information?

If you need to provide additional information for an approver, you can add comments in the Review and Confirm page. Also, if the Attachments region is enabled in the Review and Confirm page, you can add an attachment, for example, a file, URL or piece of text.

Can I save transactions before submitting them to the database?

Yes. You can use the Save for Later button on the Review page to save a transaction to be completed at a later point. Approvers can also use this functionality to return transactions to the initiator for additional information or correction. Suspended and returned transactions are accessed from the All Actions Awaiting Your Attention table on the Actions page.

Can SSHR generate notifications and other business documents?

Yes. The Document Management functionality enables you to automatically generate business documents and notifications using the data from self-service transactions. For example, you could use this functionality to create a Notification of Change or a standard letter. You define which fields are included in the documents using the PDF Forms technology.

I want to enable my employees and contingent workers to create their own SSHR users - is this possible?

Yes. You can use the New Employee and Non-employee Registration functionality to enable your users to create their own users. Employees and non-employees can register with the self-service application and create their own user names and passwords.

Common SSHR Modules

People in Hierarchy, My List, and Search Pages

The Hierarchy, My List, and Search pages are collectively known as the Enter Process pages.

The Hierarchy page is generally the starting point for all manager self-service functions. It enables managers to select a user record for processing in SSHR.

The navigation options from the People in Hierarchy page depend on the path that the manager has taken to navigate to the page. There are two possible paths:

- From the generic Manager Actions menu

  In this case, the manager first selects a person the from People in Hierarchy page or the People in My List page. This takes the manager to the Actions page. A context-sensitive list the SSHR modules or actions available for the selected person.

  > **Note:** The parameter pDestination for the Manager Actions Tree View function (HR_PERSON_TREE_SS) has the value HR_ACTIONS_SS (instead of a specific function value) to ensure that the user navigates through the Actions page.

- From a specific manager self-service menu item

  In this case, the manager selects a specific SSHR function and then selects the person for processing in the People in Hierarchy or People in My List page. When the manager selects a person, the selected function appears.

  See: Navigation Paths, page 3- 6

  See:Defining Functions for SSHR, page 2- 8

People in Hierarchy

The People in Hierarchy region displays a hierarchical view of the current manager's subordinates. Users can expand or collapse the lower levels of management as desired.

By default, the hierarchy uses a supervisor hierarchy (based either on the supervisor or the supervisor assignment).

> **Note:** If you want to build a hierarchy based on the supervisor's assignments, you must specify the hierarchy type using the HR: Supervisor Hierarchy Usage profile option and you must enable multiple assignments using the SSHR:Enable Multiple Assignments in SSHR profile option. See Multiple Assignments, page 8-38.

However, if you prefer, you can display a position hierarchy. To do this, set the profile option HR:Display Position Hierarchy. Set this profile option to Yes if you prefer to display the position hierarchy.

My List

The My List functionality enables managers to store people whose records they frequently access in a list for quick record retrieval. When a manager searches for a person, they can click the Add to My List button to add that person to the list. When the manager next selects the My List option from the People in Hierarchy page, the names of these saved employees are displayed in a table.

Advanced Search Page

As an alternative to the simple search, you can select Advanced Search to specify advanced search criteria. When you select this option, the following standard search fields are available:

- First Name
- Last Name
- Assignment Number
- Job

If these fields are not sufficient, you can add additional fields from a list. You can also specify whether the search must include all criteria or whether records that meet only some of the criteria are valid. If required, you can save the search criteria to use again.

Person Details

A manager can access the personal details for any person included in the Hierarchy or My List simply by clicking the Details icon for the person. SSHR displays the Person Detail view for the person, enabling the manager to display Employment, Salary, Performance, Absence, and Application information for the person. Training information is also available although this tab is hidden as standard. When the Person Details are displayed, the views displayed are summary views. To display more detailed information, expand the view.

For more information, see: Employee Information View, page 8-72.

Personalizing Hierarchy, My List, and Search Pages

Important: Changes in Oracle HRMS Version 11.i.10

Oracle HRMS version 11.i.10 delivers new Hierarchy, Search, and My List pages. This means that the base definitions of these pages in the Meta Data Services Repository have changed. As a result, any personalizations that you may have created on these pages are no longer valid.

In addition, SSHR plans to use the enhanced sorting functionality provided by the OA Framework. However, as this is a future development, sorting support is not currently available for the Hierarchy page.

Simple Search Personalizations

From some self-service pages, you can search for a person by entering the person's name in the Name field. If you prefer to use different search criteria, you can use the Personalization Framework to enable a drop-down list displaying the Full Name, Last Name, and First Name as search criteria. You can select any of these criteria to be the default criterion by setting the Initial Value attribute (the Last Name is the standard default value).

1. Select the Personalize Page link.
2. Navigate to the QuickSearch region
3. Personalize the Search Filter item by changing the value in the Rendered field to True.

See: Configuring Web Pages, page 5-15

Name Format

The Enter Process pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Customer Overrides

Customer overrides enable you to configure data without making any changes to database tables. In the Enter Process pages (My List, Hierarchy, Person Search), you can use customer overrides to configure a user-defined format for displaying positions and jobs. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 2- 4 .

Navigation Links (Breadcrumbs)

The delivered Hierarchy, My List, and Search pages display navigation links to help you navigate through the pages. For example:

Manager Actions: People in Hierarchy > Manager Actions: People in My List

If you choose to include this functionality in custom versions of the Enter Person pages, set the following function parameter:

- &addBreadcrumb=Y

Multiple Assignments

If a person has more than one assignment for a given manager, the manager needs to select the Action icon for the relevant assignment in order to carry out the action.

To enable multiple assignments, set the profile option HR:Enable Multiple Assignments in SSHR to Yes at the required level. This allows managers to update all assignments reporting to them. If you set the profile option to No, managers can only view and edit primary assignments.

> **Note:** If you set this profile option to Yes, Oracle recommends that you create supervisor-based security profiles for SSHR managers. See: Security Profiles in Managing User Access, page 3- 3

Transactions Across Business Groups

You can choose to enable your managers to see the names of persons in other business groups but prevent them from performing any transactions on persons in other legislations. To do this, you use the HR:Restrict Transactions Across Legislations in SSHR profile option in conjunction with the existing HR:Cross Business Group profile.

If you set the HR:Cross Business Group profile to Yes, managers can see the names of persons in other business groups and perform transactions on them. If you then set the HR:Restrict Transactions Across Legislations in SSHR profile to Yes, the application disables the names of the persons in other legislations.

Menu and Function Names

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

See: Defining User Access and Menus, page 2- 6

Workflow

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Display Position Hierarchy	Site	Yes/No	No
HR:Display Brief Person Name	Site, Application, Responsibility, User	Brief Name/Full Name	Brief Name
HR:Enable Multiple Assignments in SSHR	Site, Application, Responsibility, User	Yes/No	No
HR:Cross Business Group	All	Yes/No	No
HR:Restrict Transactions Across Legislations in SSHR	All	Yes/No	No
HR: Supervisor Hierarchy Usage	Site		

HR:Display Position Hierarchy

If you set this profile option to Yes, the application displays the position hierarchy on the Enter Person page instead of the supervisor hierarchy.

HR:Display Brief Person Name

If you set this profile option to Brief Name (default value), the application displays the person names in the brief format instead of the long name format.

HR:Enable Multiple Assignments in SSHR

This profile option controls whether a manager can view and update multiple assignments for a person in SSHR. If you set the profile option to Yes, the application displays all the assignments for a person on the Enter Process page. Otherwise, the application only displays primary assignments.

HR:Cross Business Group

This user profile option allows SSHR users to see certain information for more than one business group. For example, managers can view persons in other business groups.

HR:Restrict Transactions Across Legislations in SSHR

If you set this profile option to Yes, SSHR managers cannot carry out transactions on persons (within their supervisor hierarchy) who are from different legislations.

HR: Supervisor Hierarchy Usage

This profile option determines how supervisor hierarchies are built within Oracle HRMS and SSHR. You can select either a person-based or assignment-based hierarchy.

Additional Configuration Steps

Search Page

1. To prevent your users from using the Basic or Advanced Search, hide the corresponding region in the Personalization Framework or use function exclusions to exclude the Person Search function at the responsibility level.
2. You can configure the search criteria for the Basic and Advanced Searches. You can rearrange the sequence of the criteria by configuring the displayed fields using the Personalization Framework.

   See: Configuring Web Pages, page 5-15

Actions

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

The list is driven by the hidden submenu defined for the HR: Manager Actions Menu profile option. The default menu for this profile option is the predefined Personal Actions Menu (HR_LINE_MANAGER_PERS_FUNCTIONS).

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

See: Data Security Menus, page 3- 9

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

- Managers can click on the Actions icon for a specific assignment to display the actions relevant to the employee or worker
- Self-service users can select the Personal Actions menu option from their menu and display their personal actions

See: Navigation Paths, page 3- 6

Eligibility

The Available Actions list is, by default, limited to those actions the user is currently eligible for.

For information on setting up eligibility see: Eligibility Processing Setup Example, page 7-31.

For further information on eligibility see: Initiating a Self Service Action, *Oracle HRMS Enterprise and Workforce Management Guide*.

Viewing and processing of ineligible actions is controlled by two profile options:

- HR:Allow Use of Eligibility for Self Service Actions
- HR:Allow Processing of Ineligible Self Service Actions

When HR:Allow Use of Eligibility for Self Service Actions system profile is set to No (the default), this page does not display the Eligibility column and only eligible actions for the selected person are listed. When this profile option is set to Yes, the page displays the Eligibility column and all actions are listed. The Eligibility column distinguishes between eligible and ineligible actions.

However, a user will not be able to process an ineligible action unless HR:Allow Processing of Ineligible Self Service Actions is also set to Yes. This will enable users to process actions for which the selected person is currently ineligible, but may be eligible by the effective date. The action will still fail if the person is not eligible for the action by the given date.

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.

Concurrent transactions

The application supports multiple simultaneous actions on the same person. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes. When this profile option is set to No, the Pending column is displayed which indicates to the user whether pending transactions are present. The user can then review the pending transaction. When you set the profile option to Yes, the Pending column will not be displayed, and users will be able to perform actions against all assignments.

When concurrent transactions are activated potential data conflicts may arise. For information on how to deal with these see Managing Dates in SSHR, page 7-16.

Menu and Function Names

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

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

See: Defining User Access and Menus, page 2- 6

Workflow

Not applicable

Configurable Tips and Instructions

Actions Page

Region	Tip Type	Message Name
Actions Awaiting Your Attention	Instruction	PQH_SS_PERSON_NTF_INT
Available Actions	Instruction	HR_SS_INST_ACTIONS_DUAL
Selected Action	Instruction	HR_SS_INST_ACTIONS_SINGLE
Selected Action	Instruction	HR_INST_ACTIONS_SINGLE_SUS

Effective Date Page

Region	Tip Type	Message Name
Effective Date Options	Instruction	PQH_SS_EFFECTIVE_DT_HDR

Refresh Page

Region	Tip Type	Message name
Intervening Actions Found	Instruction	PQH_SS_CONC_REFRESH_INT

Sub Actions Page

Region	Tip Type	Message name
Assignment Header	Instruction	PER_SS_ASOF_APPROVAL_DT_DESC
Sub Actions	Instruction	PQH_SS_SUB_ACTIONS_INT

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields:

Not applicable

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Allow Use of Eligibility for Self Service Actions	Site	Yes/No	No
HR:Allow Processing of Ineligible Self Service Actions	Site	Yes/No	No
HR:Allow Concurrent Self Service Actions	Site	Yes/No	No
HR: Manager Actions Menu	All	All Manager Actions menus	Manager Actions Menu
HR:Personal Actions Menu	All	All Personal Actions menus	Personal Actions Menu
HR:Actions - Validation	All	All Actions Checked, Preselected Action Checked, All Validation Post Selection	All Actions Checked

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Return for Correction

The Return for Correction page is available from the Pending Approval Notification page.

When a manager clicks on a Return for Correction link in a notification they navigate to the Return for Correction page. Here they can select a previous approver or the initiator of the action and submit for correction with comments. A notification is sent to the selected user.

The receiver of the Return for Correction can then restart the approval notification from the following places:

- All Actions Awaiting Your Attention page
- Actions Awaiting Your Attention in Perform Action page
- Return for Correction notification

Menu and Function Names

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

User Menu Name	Function Name
HR Self-Service Pages	HR Return for Correction Page

Workflow

Not applicable.

Configurable Tips and Instructions

Return For Correction Page

Region	Tip Type	Message Name
Comments Region	Error	PQH_SS_RFC_RESPONSE_INT
Person Selection Region	Error	PQH_SS_RFC_SELECT_PERSON_INT
Top Content Region	Error	PQH_SS_RFC_CONTENT_INT

Configurable Flexfields

Not applicable.

Release Information

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

See: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

If the employee or worker subsequently decides that the information should no longer be shared, they can use the Revoke Access functionality to block access to their information.

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

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Release Information Mgr
Employee Self Service	Release Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Release Employee Information

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

CAED Page

Region	Tip Type	Message Name
CAED: Grant Access to	Instruction	HR_INST_CAED_GRANT_ ACCESS
CAED Granted Employee Header Region	Instruction	HR_INST_CAED_EXISTING_ GRANTS
CAED Pending Employee Header	Instruction	HR_INST_CAED_PENDING_ GRANTS
CAED Control Access To Employee Data	Instruction	HR_INST_CAED_TOP_TEXT

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Not applicable

Configurable Profile Options

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

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

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Additional Configuration Steps

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

   See: Defining User Access and Menus, page 2- 6

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

   See: Security Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Review and Confirm

Most functions display at least the Review page. The Review page displays a corresponding region for each web page section that you have updated as part of the preceding transaction. Inside each region is a list of current database and proposed transaction data. Changed information is highlighted with a blue dot, enabling you to easily identify which information has changed in the transaction.

The Confirm page contains a confirmation message and appropriate navigation buttons.

You can use the Personalization Framework to configure the Review and Confirm pages to suit your requirements. All of the standard Personalization Framework functionality is available to you including the ability to rearrange fields, to insert and edit instructions, and to hide and display fields and regions.

For more information, see the following documentation:

- Configuring Web Pages, page 5- 3
- Adding Instructions to Web Pages, page 5-22

Approvals

If you have configured approvals, users can enter approvals comments in this page. If you have enabled the Dynamic Approvals function, the user can view approvers and pre and postapproval notifiers, and add further approvers and notification recipients.

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

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

Attachments

If you have enabled the Attachments region in the Personalization Framework, users can attach supporting documents to the current transaction. An attachment can be a file, a URL, or text.

When the user clicks on View Attachments List. The Attachments page is then displayed in which users will then be able to edit, delete or simply view attachments using the Attachments table. The Add Attachment button will display the Add Attachment page.

What If

If you have enabled the What If region in the Personalization Framework, users can assess the impact of the change on the employee's eligibility for benefits before committing the change or sending it for approval.

> **Note:** The What If feature will only function if you have Oracle Advanced Benefits (OAB) installed.

Printable Pages

The user can print a copy of the submitted transaction for their records if required. Enable the Printable Page button in the Personalization Framework to enable this feature.

When the user clicks on the Printable Page button the transaction data will be formatted for printing. How the data is formatted depends on whether you have configured any documents in Document Manager that correspond to this action. You can use Document Manager to produce formatted documents containing merged data, using Acrobat Forms technology. See Document Manager, page 7-19. If documentation has not been configured, users will simply see a printer-friendly version of the Review page.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Common functionality which is used by all processes.

Configurable Workflow Attributes:

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

HR_DYNAMIC_APPROVAL_LEVEL:

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

HR_APPROVAL_REQUIRED_FLAG:

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

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

Confirm Instruction Application Short Name:

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

Confirm Send for Approval Instruction Name:

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

The text associated with this message name is displayed in the confirmation page immediately after the standard confirmation message. This text is only displayed when the process requires approval.

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

See: Configuring Workflow Attribute Values, page 4- 8

Configurable Tips and Instructions

Review Page

Region	Tip Type	Message Name
Additional Information	Instruction	PQH_SS_REVIEW_ATTACH_ INT
Additional Information	Instruction Text	PQH_SS_REVIEW_ADDL_ INFO_INT

Configurable Flexfields

For a list of flexfields for SSHR review pages, please see the corresponding functional descriptions.

Configurable Profile Options

Not applicable

Managing Dates in SSHR

Effective Dates

When a user initiates an action the application prompts the user for an effective date. The user can elect for the changes to take place as soon as final approval is made. Or the user can supply an effective date. The application checks the hire date and tells the user to select a later date. The application also informs the user of any pending changes to that person's record.

The application validates the entry to make sure the data is correct using specific criteria. The following checks are carried out in a chained process:

- hire_date

  Checks that the effective date entered is later than the hire date. If it is not, an error will be issued and the user will be unable to continue.

- termination_date

Checks that the effective date entered is earlier than the termination date. If it is not, an error will be issued and the user will be unable to continue.

- pending_workflow

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

  If there are pending changes, the user will be unable to continue with the action unless the profile option HR:Allow Concurrent Self Service Actions is set to Yes.

- future_assignment

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

- insert_mode

  Issues a warning (alert) only if the effective date of the assignment is less than a future-dated change.

  To configure the outcome of the above checks, see Handling Concurrent Transactions, page 7-17 below.

Handling Concurrent Transactions

The application supports multiple simultaneous actions on the same employee or worker. To activate this feature you need to set the system profile option HR:Allow Concurrent Self Service Actions to Yes.

Enabling concurrent transactions can give rise to potential data conflicts from either intervening actions or actions dated in the future. Two profile options enable you to control the potentially conflicting data: HR:Refresh Self Service Actions With Data From Intervening Actions, and HR:Manage Self Service Actions When Future-Dated Changes Exist.

Intervening Actions

If someone approves an action on an employee or worker while a manager is performing a transaction on the same employee or worker, and the effective date of the approved action is prior to the current action's effective date, then a potential conflict exists. The system profile, HR:Refresh Self Service Actions With Data From Intervening Actions, enables you to deal with this potential conflict.

- If you set the system profile to Yes, the application displays a warning message listing the attributes that have been changed by the prior approved action. A refresh of the current data will occur. The manager will then be able to proceed with the transaction.

- If you set the system profile to No, the application displays a warning with the following message: "The database contains future-dated changes to this person's record. Your current setup does not allow you to complete this action. Contact your system administrator." The current transaction will fail.

Future-Dated Changes

When the application encounters a pending change to the manager's selected person's record, effective subsequent to the current action's effective date, the future-dated change poses a potential conflict with the current action. You can manage these potential conflicts by setting the profile option, HR:Manage Self Service Actions When Future-Dated Changes Exist, to one of the values below:

- Allow Approval (Notify HR Rep)

  After completing the chain of approval, a notification of the transaction will be sent to an HR Representative who can review the change, then apply the necessary changes to the database manually.

  You must define a role based on the predefined type HR Representative, and assign it to each HR manager you want to receive the notification. The first HR manager to act on the notification and apply manual changes does so on behalf of all HR Representatives.

- Stop with an Error

  The manager will be forced to choose an Effective Date subsequent to the future-dated change.

> **Important:** If you enable the system profile HR:Manage Self Service Actions When Future-Dated Changes Exist by setting it to Allow Approval (Notify HR Rep), Oracle highly recommends that you also enable HR:Refresh Self Service Actions with Data from Intervening Actions. Otherwise you should disable HR:Refresh Self Service Actions with Data from Intervening Actions.

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

Save For Later

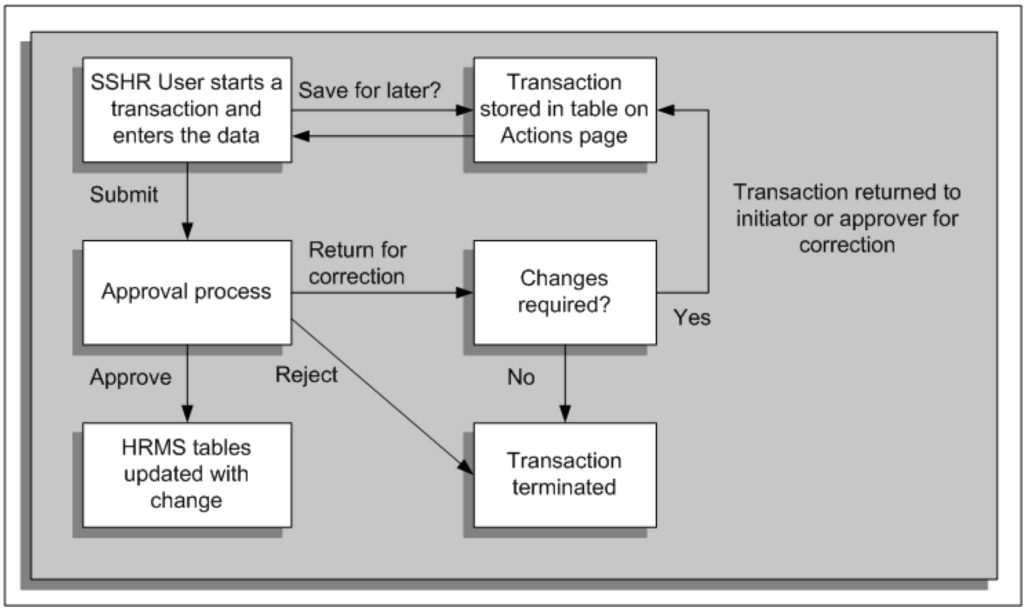
The Save for Later functionality enables a user to interrupt transactions before they are complete. The user can then save them so that they can be completed at a later point. When users save a transaction for later the application sends them a notification.

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

Both suspended transactions and returned transactions are displayed in the All Actions Awaiting Your Attention list on the Actions page.

Users can also access their saved functions using the All Actions Awaiting Your Attention menu option on the employee and manager menus.

Save for Later Functionality



The graphic above shows how transactions can be saved for later and returned for correction.

Route 1 (Save for Later): When a user initiates a self-service transaction, or receives a transaction for correction, they can either submit the transaction for approval immediately or save the transaction for subsequent processing. If the user submits the transaction immediately, the transaction is subject to the usual approval processes. If the user chooses to save the transaction for later, it is suspended and the user can restart it or delete it from the All Actions Awaiting Your Attention table in the Actions page.

Route 2 (Return for Correction): When a user has submitted a transaction for approval, the approver can either approve the transaction, reject the transaction, or return it for correction. If the approver returns the transaction for correction, the initiator can subsequently restart or delete it from the All Actions Awaiting Your Attention table in the Actions page of the initiator.

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

The application will notify users whenever they have saved a transaction for later.

> **Note:** If you want to disable the Save for Later feature you need to set the profile option HR:Self Service Save for Later to No (the default is Yes). This will hide the Save for Later button on all transaction pages and the Review page.

Document Manager

Document Management features enable you to automatically generate business documents containing data from self-service actions. Examples of business documents might include a Request for Action, Notification of Change, standard letter, or contract. You set up your documents in two stages:

- Create formatted PDF documents, using PDF Forms technology to create form fields
- Configure document groups and attribute mappings in HRMS Document Manager

Create Formatted PDF Documents

Create formatted documents in any word processing or page layout application, then generate a PDF file. In a PDF editing application, add named form fields to contain data from the action. The form field names are the tags you map to your action's attributes in Document Manager.

Configure Document Groups and Attribute Mappings

Using an HRMS Manager responsibility, run Document Management from the Main Menu.

Document Management Page

From this page, you can create a new document group by entering a Group Name and Short Name. You can also search for existing groups. You use document groups to define a collection of PDF documents and associate them with the appropriate workflow process. To create the link between the document group and the workflow process, add the function parameter pGroupName=<*documentgroupshortname*>.

From the Results list, you can add, update, or remove documents from the group.

Map Documents Page

Use this page to add a document to the selected group. You can select from a list of documents in the database that are not yet part of a group, or you can add a new document.

Define (Update) Document Page

Here you add a new document by defining a document name and short name. You specify the document's effective date, then upload a new PDF file or select one that already exists in the database. Here you also specify any FastFormula you want to use to populate PDF document tags with returned values from the database, or override tag values with literals.

Define Document: Attribute Mapping

This page displays a list of tags (form field names) found in the selected PDF file, with corresponding Transaction Data Attribute fields. To merge data to each form field from attribute values found in an action, you search for available attributes in the Transaction Data Attribute field beside the tag name.

Define Documents Properties

If you select an existing document on the Define Document page and press Continue, the Define Documents Properties page appears. Here you can specify if this is the Pre-Approval or Post-Approval version of the document, or if it is both. Pre-Approval versions of documents appear when a user presses the Printable Page button on the

Review page of an action, while it is still in process. Initiators receive a notification on final approval containing a link to post-approval versions of available documents.

FastFormula Options

You can do the following using FastFormula:

- Set a value into the document
- Override an existing value in the document

Your formula must be of type Document Print.

The application provides three predefined input parameters for your use:

- P_SESSION_ID
- P_TRANS_ID
- P_EFFECTIVE_DATE(TEXT)

Setting a Value into the Document

Say you want to set the manager name in the document, but the manager name is not a data field found within the workflow process.

Using an HRMS Localization Seed Data responsibility, create three functions, described below in order of invocation.

1. A FastFormula function that passes the Transaction ID to a database function, returning the manager name
2. A database function that returns the manager name for the specified transaction
3. A second FastFormula function that sets the manager name in the PDF tag (form field)

Function	FastFormula Function1	Database Function	FastFormula Function2
Name	My_FF_Get_Mgr_ Name	MyPackage.My_DB_ Mgr_Name_Function	My_FF_Put_Mgr_ Name
Definition	MyPackage.My_DB_ Mgr_Name_Function		PQH_SS.PRINT.set_ document_data
Data Type	VARCHAR2	VARCHAR2	Number
Class	External		External
Parameters	Use predefined parameter: **Name**: P_TRAN_ID **Type**: VARCHAR2 **Class**: Input Value	Use predefined parameter: **Name**: P_TRAN_ID **Type**: VARCHAR2 **Class**: Input Value	Use predefined parameters: **Name**: P_TAG_ NAME **Type**: Text **Class**: Input Value **Name**: P_TAG_ VALUE **Type**: Text **Class**: Input Value
Return Value	mgr_name	db_mgr_name	0 = success

The database function returns the manager name (db_mgr_name) to FastFormula Function1:

`<local variable1> = My_FF_Get_Mgr_Name(P_TRAN_ID)`

The second FastFormula function sets the manager name (mgr_name) in the PDF document form field:

`<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME',<local variable1>)`

Overriding an Existing Value in the Document

Say you want to override the manager's name with a specific manager's name. You can override the existing value with a literal:

`<local variable2> = My_FF_Put_Mgr_Name('MANAGER_PDF_TAGNAME','Mark Johnson')`

> **Note:** Performing the tasks described in this section assumes knowledge of FastFormula, including the ability to use SQL queries to create Definitions, such as MyPackage.My_DB_Mgr_Name_Function.

See: Using Oracle FastFormula, available on Metalink.

Menu and Function Names

The following table lists user menu names and function names for this module.

User Menu Name	Function Name
	SSHR Document Management

Workflow

Not applicable

Configurable Tips and Instructions

The following tables list the configurable tips and instructions for each page.

Define Document Page

Region	Tip Type	Message Name
Page	Instruction Text	PQH_SS_DEFINE_DOC_INT
Page	Instruction Text	ICX_POR_INDICATES_REQ_FIELD
Page	Instruction Text	PQH_SS_DEFINE_DOC_U_INT
Error	Error	PQH_SS_DUPLICATE_SHORT_NAME
Error	Error	PQH_PA_NO_TAGS_IN_FILE
Error	Error	PQH_SS_INVALID_FILE_ERR

Define Document: Attribute Mapping Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_ATTR_MAP_INT

Define Document: Attribute Mapping Delete Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_SS_DOC_DELETE_MSG_INT

Define Document Properties Page

Region	Tip Type	Region Name
Select Document Properties	Instruction Text	PQH_PA_DOC_PROP_INT

Document Mapping Page

Region	Tip Type	Region Name
Warning	Error	PQH_PA_DOC_CREATED_INT

Document Delete Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOCUMENT_DELETE_INT
Page	Instruction Text	PQH_SS_DOC_DELETE_INT

Document Update Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOCUMENT_UPDATE_INT
Document Information	Instruction Text	PQH_SS_DOC_UPDATE_ALLOWED_TIP

Document Search Page

Region	Tip Type	Region Name
Page	Instruction Text	PQH_PA_DOC_MGMT_GRP_INT
Results	Instruction Text	PQH_PA_DOC_MGMT_HGRID_INT
Search Group	Instruction Text	PQH_PA_GRP_SRCH_HRD_INT
Confirmation	Information	PQH_PA_RECORDS_SAVED

Document Remove Warning Page

Region	Tip Type	Region Name
Description	Instruction Text	PQH_SS_DOC_REMOVE_DESC
Instruction	Instruction Text	PQH_SS_DOC_REMOVE_INT

Map Documents Page

Region	Tip Type	Region Name
Results	Instruction text	PQH_PA_DOC_SRCH_RSLT_INT
Results	Instruction text	PQH_PA_DOC_SRCH_RSLT_U_INT
Search	Instruction text	PQH_PA_DOC_SRCH_INT

Define Group Page

Region	Tip Type	Region Name
Page	Instruction text	PQH_PA_GRP_HDR_INT
Page	Instruction text	PQH_MANDATORY_MESSAGE_INT

Group Details Page

Region	Tip Type	Region Name
Page	Instruction text	PQH_PA_GROUP_DETAILS_INT

Group Delete Warning Page

Region	Tip Type	Region Name
Description	Instruction text	PQH_SS_DOC_DELETE_GRP_DESC
Instruction	Instruction text	PQH_SS_DOC_DELETE_INSTRUCTION

See .Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

New User Registration

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

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

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

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

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

Benefits Registration

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

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

Generic Users and Responsibilities

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

Default Organization

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

Default Payroll

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

Default Responsibility

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

New Employee Registration and Non-employee Registration

These modules are available under the predefined New User Registration Responsibility. They can be used as part of employee self-service or manager self-service. Using New Employee Registration, users log on with a generic user name to create their own employee records in Oracle HRMS, and their own self-service user name and password. Using Non-employee Registration, other people can log on to create non-employee records in your Oracle HRMS.

Menu and Function Names

User Menu Name	Function Name
New User Registration	New Employee Registration
New User Registration	Non-employee Registration

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

New Employee Registration Process and COBRA Registration Process

See: Overview of Oracle Workflow for Users, *Oracle Workflow Guide*

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Ben Life Event Cobra	Message	BEN_COBRA_LIFE_EVENT_ DATE
Ben Life Event Cobra	Message	BEN_LIFE_EVENT_COBRA
Ben Life Event Current	Message	BEN_LIFE_EVENT_DATE
Ben Life Event Current	Message	BEN_LIFE_EVENT_ CURRENT
Registration user Main Content	Short Tip	HR_INCORRECT_ PASSWORD_LENGTH
Verification Content	DATE_FORMAT	

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Region	Flex Name	Flex Code
Verification Content	Additional Personal Details Flex	PER_PEOPLE
Extra Information Type Update	Extra Person Information	Person Developer DDF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: User to Organization Link	All	Organizations	Null
OAB User to Payroll Link	All	Payrolls	Null
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site--set to Yes	Yes/No	No

Create User Name

This module is available under the predefined New User Registration Responsibility. It can be used as part of employee self-service. Using Create User Name, people who already have an HR record in Oracle HRMS can create their own self-service user names and passwords.

Menu and Function Names

User Menu Name	Function Name
New User Registration	Create User Name

Workflow

The workflow details for this module are listed below:

Workflow Process Display Names:

Create User Name Process

Note: Approval is not supported by these processes.

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
New User Creation Verification Content	DATE_FORMAT	
Registration User Main Content	Short Tip	HR_INCORRECT_ PASSWORD_LENGTH

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Region	Flex Name	Flex Code
New User Creation Verification Content	Additional Personal Details	PER_PEOPLE

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Profile	Configurable Levels	Values	Default
OAB: Self Registered User Responsibility	All	Responsibilities	Self Registered Employee Default Responsibility
HR: Business Group	Set at Responsibility level	Business groups	
HR: Self Service HR Licensed	Site--set to Yes	Yes/No	No

User Hooks To Generate User Names For New User Registration

As supplied, the New User Registration processes (Create New User, New Employee Registration, and Non-employee Registration) include a User ID page where users can enter a user name and password for logging on to self service. Alternatively, you can implement some additional code so that the user name and password are generated by the application when the user clicks a button on this page. You can implement this using user hooks.

There are two user hooks:

- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_B (which we will call the "Before user hook" because it runs before the user name is created)
- BEN_PROCESS_USER_SS_BK1.CREATE_USER_DETAILS_A (which we will call the "After user hook" because it runs after the user name is created)

They are called in the user api BEN_PROCESS_USER_SS_API. The user hooks communicate with this caller api through a set of globals. These globals are defined in the package BEN_PROCESS_USER_UTILITY. The usage notes within this package explain how to use the globals.

Using the Before User Hook

Use the Before user hook to set globals with user and responsibility information. To set the globals with user information, use G_FND_USER_RECORD. To associate responsibility and security group/security profile information with the user, use G_FND_RESP_RECORD. If you do not set the responsibility and security information using globals, the application uses the responsibility from the *OAB:Self Registered Employee Responsibility* profile option.

Minimum Setup

The minimum you need to do to create a user with today's date as the start date is to put the following two lines in the Before user hook.

ben_process_user_utility.g_fnd_user_record.user_name := 'testuser';
ben_process_user_utility.g_fnd_user_record.password := 'testpassword';

You can also set up globals for start_date, end_date, last_logon_date, password_date, password_accesses_left, password_lifespan_accesses, password_lifespan_days, email_address, fax, description, customer_id, and supplier_id.

> **Important:** Never set the employee_id global within the New User Registration processes. If you do so, the global overwrites the employee id created during the process and so the user will not be associated with the correct employee id. If you want to use the user wrapper api outside of the page for creating user name and password, you can then pass in the global for employee id.

Using the After User Hook

Use the After user hook to accomplish something that needs to be done after a user is created. For example, the Before user hook enables you to pass in information about a responsibility, but it does not handle multiple responsibilities. You could pass no information about responsibility in the Before user hook and instead call the appropriate "fnd" api(s) in the After hook to take care of the responsibility, menu, or any profile value that you want to associate with the user.

Another use for the After hook might be to write code to populate some tables--such as communication or extract tables--from where you can extract the information later.

Set Up Eligibility Processing

Eligibility Processing Setup Example

The following is a best practice example of how to set up automatic calculation of a person's eligibility for a self-service action, using features available in HRMS Compensation and Benefits as a processing engine. When a user initiates an action, the application runs the Compensation and Benefits BENMNGLE engine, and displays whether or not the selected person is eligible.

To enable eligibility processing, turn on the system profile HR:Allow Use of Eligibility for Self Service Actions. If you want to allow users to process actions for which a selected person is not eligible, turn on HR:Allow Processing of Ineligible Self Service Actions.

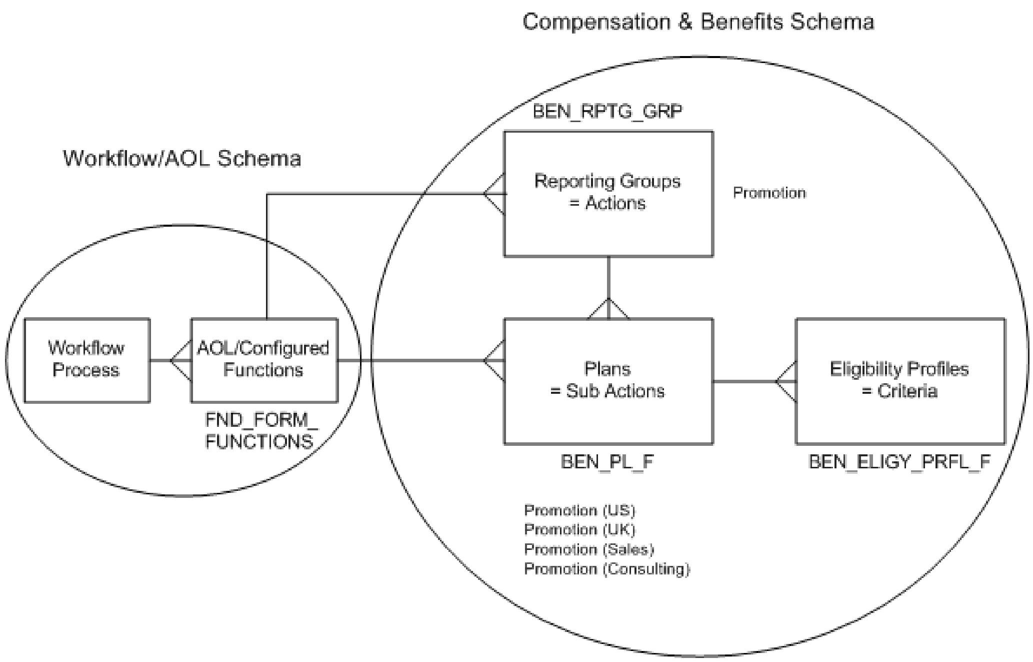
If you are confident that the BENMNGLE engine runs and updates the results tables on a regular basis, you can improve performance by disabling the profile HR:Run BENMNGLE when processing a Self Service action.

The system profiles described above are off by default.

Eligibility for Self-Service Actions

The following figure describes how SSHR has mapped the Workflow and AOL schema onto the Compensation and Benefits schema to provide a generic eligibility processing engine. In a typical implementation, you link your copied and configured form functions to actions, such as Promotion. The actions take on a parent relationship with sub actions such as Promotion (US) or Promotion (Sales), which you define based on the requirements of, say, differing locales or departments.

Mapping the Workflow/AOL Schema to the Compensation and Benefits Schema



For a person to be eligible for a sub action that is legislation-specific, say, Promotion (US), you set up the sub action (plan) in a US business group. You refine the criteria that make a person eligible by defining eligibility profiles and linking them to the sub action. You can link each form function to multiple actions and sub actions, but you can determine eligibility only for sub actions.

> **Note:** The application considers a person who meets all *Required* profiles and at least one *Optional* profile eligible. If you link only one profile to a sub action, you define it as Required.

Setting Up Eligibility Based on Length of Service

In this example, you have already decided to use the Benefits engine to process eligibility, and you have configured the form functions your enterprise wants to make available to users. User-friendly names help users recognize the workflow processes. Examples might include:

- Promotion (Australia)
- Promotion (Manufacturing)
- Transfer
- Award Bonus

This example assumes that you have copied and configured two form functions based on the predefined function Change Job:

- Change Assignment
- Change Assignment with Bonus

You have identified the applicable policies and eligibility rules in effect in your organization, and reviewed the available eligibility profile criteria. You have asked and answered appropriate business questions, including:

- What are the criteria that govern eligibility for each available form function? Examples include:
  - Legislation
  - Organization Unit (department)
  - Job
  - Length of Service
- Which life events can impact eligibility for actions?

In your organization, an employee is eligible for a bonus after one year of service. You set up eligibility processing so that if a person's length of service is less than one year, the person is eligible only for Change Assignment. If length of service is one year or more, the person is eligible for Change Assignment with Bonus.

Generic Steps to Set Up Eligibility

The steps below describe the generic process of setting up eligibility for sub actions.

1. Define eligibility criteria as required
2. In the Participant Eligibility Profiles window:
   - Create eligibility profiles
3. In the Plan Types window:
   - Define a plan type
4. In the Plans window:
   - Create plans (sub actions)
   - Link each plan to a form function (Miscellaneous tab)
   - Link eligibility profiles to each plan (Plan Eligibility tab)
5. In the Reporting Groups window:

- Create reporting groups (actions)
- Link each reporting group to a form function
- Link each reporting group to plans (Components tab)

Sample Steps for Length of Service

Using an HRMS Manager responsibility, follow the steps below to set up eligibility based on length of service.

Derived Factors

Specify how the application evaluates length of service criteria by defining two derived factors.

1. Define the first derived factor, in which length of service is less than one year. In the Derived Factors window (Length of Service tab):
   - Name = "LOS < 1 yr"
   - UOM = "Day"
   - Date to Use Code = "Date of Hire"
   - Values: Activate the No Min check box; Max = 364
   - Determination Code = "As of Event Date"
2. Define the second derived factor, in which length of service is one year or more. In the Derived Factors window (Length of Service tab):
   - Name = "LOS >= 1 yr"
   - UOM = "Year"
   - Values: Activate the No Max check box; Min = 1
   - Date to Use Code and Determination Code are the same values as the first derived factor

Eligibility Profiles

Set up two eligibility profiles. The first makes a person eligible with less than one year of service, the other makes a person eligible with a year or more of service. You can set up as many eligibility profiles as you need to qualify a person for an action. You specify if a profile is Required or Optional when you link the profile to a plan, below.

1. Define the first eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "Less Than 1 yr LOS"
   - Assignment Type = "Any Assignment" (Primary and Secondary)
   - Status = "Active"
   - Applies To = "Benefits Profile"
   - Select "Length of Service" from the LOV
   - Length of Service = "LOS < 1 yr"
2. Define the second eligibility profile. In the Participant Eligibility Profiles window (Derived Factors tab):
   - Name = "1 yr or More LOS"

- Select the same values for Assignment Type, Status, and Applies To as the first profile
- Length of Service = "LOS >= 1 yr"

  Note: If the Assignment Type is Any Assignment, eligibility processing can consider secondary assignments, enabling the application to find all actions for which the person is eligible. In a good implementation, a person is eligible for only one related sub action for each action. If BENMNGLE retrieves more than one eligible sub action, a Sub Actions page appears and displays the available choices.

Sub Actions (Plans) and Actions (Reporting Groups)

Create a plan type to relate your sub actions (plans) to self-service actions eligibility instead of benefits.

1. Define a new plan type to use for self-service actions. In the Plan Types window:
   - Name = "Business Process"
   - Option Type = "Personnel Action"
2. Define a sub action that includes only the assignment change. Link it to a form function and an eligibility profile. In the Plans window:
   - Name = "Change Assignment"
   - Status = "Active"
   - Plan Type = "Business Process"
   - Plan Usage = "May not be in program"
   - On the Eligibility Rates tab, activate the "Track ineligible persons" check box
   - On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment" (or any form function name you have configured to change an assignment)
   - Confirm that you have activated the Plan Years Not Applicable check box
   - Save your work
   - Press the Plan Eligibility button to open the Maintain Plan Eligibility window
   - Press the Eligibility button to open the Eligibility window. Eligibility Profile Name = "Less Than 1 yr LOS"
   - Activate the Required check box
   - Save your work
3. Define a second sub action that additionally includes bonus. The steps are the same as in the first sub action, except for the following:
   - Name = "Change Assignment with Bonus"
   - On the Miscellaneous tab, Personnel Action Function Name = "Change Assignment with Bonus" (or any form function name you have configured to change an assignment and award a bonus)
   - Eligibility Profile Name = "1 yr or More LOS"

4. Define an action and link it to your two sub actions to complete your setup. In the Reporting Groups window:
   - Name = "Change Assignment"
   - Purpose = "Personnel Action"
   - Function Name = "Change Assignment"
   - Save your work
   - Plan = "Change Assignment"; Plan = "Change Assignment with Bonus" (Components tab)

See:

Plan Design, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Requirements for Total Compensation, *Oracle HRMS Compensation and Benefits Management Guide*

Eligibility Profile Criteria, *Oracle HRMS Compensation and Benefits Management Guide*

Derived Factors, *Oracle HRMS Compensation and Benefits Management Guide*

Defining a Reporting Group, *Oracle HRMS Compensation and Benefits Management Guide*

Setting Up a Generic User ID For New User Registration

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

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

If you are implementing new user registration in more than one business group, see: Setting Up Generic User IDs in Multiple Business Groups, page 7-38. If you are implementing new user registration within a single business group, use the following procedure.

If you are *only* implementing the Create User Name process (that is, you are using self-service to create new users but not to create HRMS records), you can omit steps **7**, page 7-37and**8**, page 7-38.

To set up self-service registration in a single business group:

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

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

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

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

   See: Defining a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

   See: Associating an Organization with a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

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

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

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

4. Create a generic user name and password for the business group or for each organization, so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 7-44.

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

5. Add the New User Registration responsibility (or the responsibilities you created in step *3*, page 7-37) to the generic user name for each organization.

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

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

   > **Important:** Check to ensure that the organization you select is correct. The list of values contains all the organizations in the

database. You must select an organization defined in the business group associated with the user name.

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

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

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

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

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

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

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

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

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step `4`, page 7-37. After entering it, you must change the password to a generic password you want the new people to use when accessing self-service initially to register.

12. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB: Self Registered User Responsibility profile (step `10`, page 7-38) to the new user name.

Setting Up Generic User IDs in Multiple Business Groups

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

To set up self-service registration in multiple business groups:

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

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

   See: Creating an Organization, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Adapting and Creating a New Business Group, *Oracle HRMS Enterprise and Workforce Management Guide*

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

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

3. Create a generic user name and password for each organization so that new people can log on to the Registration page. If users will log in with a guest login, create the guest user instead. For further information on guest users, see: Configuring the Create User Name Process, page 7-44.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

    As the system administrator, the first time you log into self-service, you gain access by using the password you created in step *3*, page 7-39. After entering it, you must change the password to the generic password you want new people to use when accessing self-service initially to register.

11. Use the New Employee Registration function to create a new person and a user name for that person. The application assigns the responsibility set in the OAB:Self Registered User Responsibility profile (step **9**, page 7-40) to the new user name.

Configuring the New Employee and Non-Employee Registration Processes

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

These processes include, by default, the following pages:

Page	Required?	Purpose
Introduction	No	This page includes a checklist of information that new users must have when entering their registration, and a legal agreement that users must agree to before proceeding.
Verification	No	This page has the user enter minimal information about themselves. This way the system can check for their existence on the database before they attempt to register their data.
Basic Details	Yes	Users enter marital status, and other personal data.
Main Address	Yes	Users can enter a primary address and two other addresses.
Phone Numbers	No	Users can enter the phone numbers they require.
Assignment	Yes, for New Employee process (not in non- employee process)	Employees can fill in information about their organization, job, position, grade, payroll, assignment status, people group, and additional employment information.
Family Member Coverage	No	This page simply asks users whether they wish to enter details of other family members. If they confirm that they do, the Add Family Members page appears.
Add Family Members	No	Users can enter names, addresses, phone numbers, and additional personal information for as many contacts as they require.
Life Events	No	**Relevant to US Third Party Benefits providers only.** Users can select the life event that has made them eligible for a benefits program. This creates a potential life event for the person. NOTE: Employers must remove this page from the process.

Page	Required?	Purpose
User Name	No	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

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

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

Using Workflow Builder

To configure the New Employee and Non-employee Registration workflows:

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

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

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

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

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

   See: Configuring Workflow Objects, page 4- 7

Using the Personalization Framework

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

On the Personal Information page:

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

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

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

On the Verification page:

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

For a list of configurable regions, see: New Employee Registration and Non-employee Registration, page 7-27.

See also: Configuring Web Pages, page 5-15

Setting Up Life Events (Advanced Benefits only)

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

You determine which life events appear on the Life Events page by the *Selectable for Self-Service* code you enter when you define the life event in the professional user interface. The code choices are:

- All--meaning that the life event can be selected in all self-service processes that use the Life Events page.
- Basic Registration--meaning that the life event can be selected in the New Employee Registration process
- COBRA Registration--meaning that the life event can be selected in the Non-employee Registration process
- Basic and COBRA Registration--meaning that the life event can be selected in both the New Employee and the Non-employee Registration processes

Colliding Life Events:

When a person selects a life event from this page, the process will insert the event as a potential life event for the person. By completing the rest of the registration process, the person may have other life events detected due to life event triggers in the business group. Ensure that your life event collapsing and collision logic leaves a user with just one "winning" potential life event during the Participation Process. You could do this by one of the following approaches:

- Ensuring that all life events that can be selected in Registration have the Override check box selected (and other life events that might be triggered do not). Then, during setup of collapsing life events, you could choose which event should win if there is more than one overriding event.
- Turning off automatic triggering of life events
- Removing Life Event page from workflow and configuring life event triggers in the business group to be detected based on data entered by the person during the registration process. This is the approach that employers should use to determine data changes that may give the person an opportunity to make benefit election changes.

Configuring the Create User Name Process

The Create User Name Process workflow within the Human Resources Self-Service item type displays the pages for people who already have a record on the HR database to create their own self-service user names and passwords.

This process includes, by default, the following pages:

Page	Required?	Purpose
Verification	Yes	This page has the user enter minimal information about themselves. This page must find one and only one person matching the information entered so that the User is connected to the correct HR record
User Name	Yes	On this page, users can create their own user id and password. Alternatively you can generate user names and passwords. A user hook is provided so that you can write the PL/SQL to generate the user names and passwords as you require.
Review	Yes	This page summarizes all the information in the database about the new user. If the user clicks Submit, the data is saved and the Confirmation page displays.
Confirmation	No	If you want to enable users to enroll themselves in benefits, you can display the Enroll Now button on this page.

To configure the Create User Name process:

1. Decide whether users should log on to use this process with a generic company ID or with a guest ID (which would happen automatically and be invisible to the user).
2. If you decide to use a company ID for extra security:
   - Decide whether to create an ID specific to this process, or shared with the new employee registration process. This determines whether the user sees a menu of processes after logging on, or is taken straight to the Create User Name process.
   - Decide how to communicate the company IDs to your users. One approach--if you have licensed Oracle Advanced Benefits--is to create a new communication type and use the Determine Communications batch process. This approach will only work for people currently in the database.
3. If you decide to use a guest ID, there are three approaches you can use. Do ***one*** of the following:
   - In the Users window, create the guest user with the user name GUESTOAB and the password GUESTOAB. You can grant this user the predefined New User Registration responsibility or your copy of it. Log on using this user to change the password to WELCOME.

     Call the supplied pl/sql procedure ben_guest_user_api without passing a user name and password. The procedure uses user name GUESTOAB and the password WELCOME. It passes the user name and unencrypted password into the call to oraclehomepage.home().

> **Note:** Call ben_guest_user_api from a URL in this way: [APPS_WEB_AGENT]ben_guest_user_api.login?i_1=USERNAME&i_2=PASSWORD&rmode=2

- In the Users window, create the guest user with any name and password. Log on using this user to change the password.

  Call the supplied pl/sql procedure ben_guest_user_api, passing a user name and unencrypted password. (For the format of the call, see the Note above) If the user name is passed in, the password must be too, or the procedure returns an error. The procedure passes the user name and unencrypted password into the call to oraclehomepage.home().
- Call oraclehomepage.home directly passing a user name/password if desired. (For example, oraclehomepage.home?userid=<your user name>&password=<your password>).

4. On the Verification page:
   - Decide what information a user must enter on the Verification page of the system to identify the existing HR person record. By default this information is: first name, last name, and birth date. You can add the following fields: national identifier (such as social security number), employee number, email address, supervisor, organization, location, address, and person flexfields.
   - Decide what to display if the information entered on the Verification page matches more than one person. By default, the application displays an error.

   For a list of configurable regions, see: Create User Name, page 7-29.
5. Decide what should happen if users try to create a user name when they do not have an existing HR record. By default the application issues an error directing the user to retry or Cancel to the menu and contact their administrator. You can configure the message text and the URL associated with the Cancel button. For example, the Cancel button could take them straight to the New Employee Registration process, rather than to the menu.
6. Determine which responsibility to assign to the new users. By default, all new users are granted the responsibility set in the OAB:Self Registered User Responsibility profile option. You may wish to configure this to vary the responsibility by the person type (especially employee versus non-employee).

   To do this, you can create different generic IDs (and responsibilities) for different groups of users and change the OAB:Self Registered User Responsibility profile option at responsibility level.

Generating Self-Service User Names and Passwords

When a person has registered themselves in the HR database, you can choose to generate their self-service user name and password, rather than have them create their own. You can implement this using user hooks.

To generate user names and passwords:

1. Write the PL/SQL to generate the user names and passwords as you require, using the user hooks.

   See: User Hooks To Generate User Names for New User Registration (appendix), page 7-30.

2. Optionally, edit the instruction text on the User ID page, hide the user name and password fields, and change the button label from Next to Generate.

3. Consider how you will inform users of their user name. One approach--for Oracle Advanced Benefits customers--is to use a user hook to call your own code that populates the communication tables, and use this information to alert your users. Another approach is to generate the user names in a standard and predictable way from users' names or national identifiers.

8

Workforce Sourcing and Deployment

Workforce Sourcing and Deployment Overview

SSHR provides self-service functions within the following area of Workforce Sourcing and Deployment:

- Recruiting and Hiring
- People Management

This chapter looks in detail at the self-service functions available within this area and provides information on the functionality and configuration options for each function.

Using SSHR for Workforce Sourcing and Deployment

How can I use SSHR for my workforce sourcing and deployment processes?

You can use the New Hire processes to hire applicants and to bring contingent workers to your enterprise. These processes enable you to enter data in a series of web pages and to then finally hire the applicant or contingent worker.

Can I modify these processes to suit the requirements of my enterprise

Yes. The sequence of web pages used in the New Hire processes is defined in the Workflow Builder. To modify this sequence, you can create your own version of the New Hire processes and chain together the required modules in a different sequence.

Does SSHR carry out any checks when I hire an applicant or contingent worker using the self-service interface?

As in the Professional Forms Interface, SSHR can check for any duplicate persons within the system if required. If you activate this functionality, SSHR displays a list of any possible duplicate persons.

Can I access the iRecruitment functionality using the self-service interface?

Although iRecruitment uses a self-service interface and the Oracle Applications Framework functionality, you cannot access iRecruitment directly from SSHR. To access the iRecruitment functionality, you must purchase the appropriate license.

What are the advantages to the HR Department of using SSHR?

Potential self-service activities in an HR department range from simple data entry tasks, such as updating personal and educational details, to more complex tasks, such as informing employees of their current vacation allowance and providing policy advice. With SSHR, the person making an inquiry or wanting to change their personal details can find and manage this information themselves at little administrative cost to the HR department.

How does SSHR improve the accuracy of employee data?

Employees have a vested interest in ensuring their information is accurate, for example, to ensure that their pay check is mailed to the correct address. With SSHR, employees can maintain their own data and ensure that it is correct.

How does SSHR improve a manager's access to information?

Managers using SSHR can access the information for their employees using a hierarchy tree or, if enabled, the Person Search function. Security mechanisms ensure that managers can only retrieve information for those employees to whom they have access.

In addition, the Employee Directory provides contact information for employees within the enterprise. Users can search for people using different search criteria and look up contact and organizational information.

Can I use SSHR to carry out standard HR procedures?

Yes. You can use the Manage Employment Events functionality to carry out such procedures as granting a salary increase, reassigning an employee to a new position, or terminating an employee. You can use the Workflow Builder functionality to chain different modules together to create enterprise-specific procedures.

Employee Demographics

Personal Information Modules

The Personal Information function enables self-service users to enter and update their own personal records. This function is integrated within Oracle Workflow. By using Oracle Workflow and the Personalization Framework, you can design a process to control which personal details a user can change or display. You can also design an approval process for any changes made by employees, workers, or managers. The Personal Information function can be used to update basic details such as Marital Status, Title, First and Last Name, Addresses, Emergency Contacts, and Dependents and Beneficiaries.

The Personal Information module can include Extra Information Types. It can also be chained in a workflow process.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Personal Information

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Basic Details

The Basic Details module records information such as a user's name and marital status.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Basic Details

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Basic Details Page

Region	Tip Type	Message Name
Basic Detail Update Name Entry	Long Message	HR_TIP_EFFECTIVE_DATE
Basic Detail Update Name Entry	Long Message	HR_TIP_PREFIX
Basic Detail Update Name Entry	Long Message	HR_TIP_SUFFIX
Basic Detail Update Name Entry	Long Message	HR_TIP_PREFERRED_NAME
Basic Detail Update Name Entry	Long Message	HR_TIP_PREVIOUS_ LASTNAME
Basic Detail Update Name Entry	Instruction	HR_INST_BASIC_DETAILS_ FORM
Basic Details Update Entry	Instruction	HR_PERINFO_FUTURE_ CHANGES

Basic Details Action Page

Region	Tip Type	Message Name
Basic Details Action Type	Instruction	HR_INST_BASIC_DETAILS_ TOC

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Basic Details Page

Region	Flex Name	Flex Code
Basic Detail Update Other Entry	Further Person Information	Person Developer DF
Basic Detail Update Other Entry	Additional Personal Details	PER_PEOPLE

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Main Address

The Main Address module stores the employee's primary address.

Address Styles

You can choose how to display your address in SSHR by configuring the Personal Address Details descriptive flexfield.

For information on this procedure, see: Changing the Default National Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

> **Note:** If you create a custom address style, make sure that the first two letters of the flexfield code for the custom segment must relate to the localization code, for example, US_ABC or NZ_ABC. If the flexfield code does not relate to the localization code, SSHR will use the general address style.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Main Address

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Main Address Page

Region	Tip Type	Message Name
Main Address Update	Long Message	HR_TIP_MADDR_EFFECT IVE_DATE
Main Adderss Update	Long Message	HR_TIP_MADDR_ ADDRESS_TYPE
Main Address Update	Instruction	HR_INST_MAIN_CORRECT_ ADDRESS
Main Address Update	Instruction	HR_INST_MAIN_NEW_ CHG_ADDRESS
Main Address Update	Instruction	HR_INST_VIEW_FUTURE_ CHANGES

Main Address Action Page

Region	Tip Type	Message Name
Main Address Action Type	Instruction	HR_INST_MAIN_ADDRESS_ TOC

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Main Address Page

Region	Flex Name	Flex Code
Main Address Update	Personal Address Details	Address Structure
Main Address Update	Additional Address Details	PER_ADDRESSES

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Secondary Address

The Secondary Address module stores additional addresses for a self-service user.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Secondary Address

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Other Address Page

Region	Tip Type	Message Name
Second Address Update	Instruction	HR_TIP_SADDR_EFFECTIVE_DATE
Second Address Update	Instruction	HR_TIP_SADDR_ADDRESS_TYPE
Second Address Update	Instruction	HR_INST_SCND_CORRECT_CHANGES
Second Address Update	Instruction	HR_INST_SCND_NEW_CHG_ADDRESS
Second Address Update	Instruction	HR_INST_VIEW_FUTURE_ADDRESS

Other Address Action Page

Region	Tip Type	Message Name
Secondary Address Action	Instruction	HR_INST_SECONDARY_ ADDRESS_TOC

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Other Address Page

Region	Flex Name	Flex Code
Secondary Address Update	Personal Address Information	Address Structure
Secondary Address Update	Additional Address Details	PER ADDRESSES

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Phone Numbers

The Phone Numbers module stores the telephone information for an self-service user.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Phone Numbers

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Personal Information Overview Page

Region	Tip Type	Message Name
Phone Numbers Overview	Instruction	HR_PERINFO_PHONES_ ABOVE_LIMIT
Phone Numbers Update	Instruction	HR_INST_PHONES_FORM

Other Addresses Page

Region	Tip Type	Message Name
Second Address Update	Instruction	HR_INST_SCND_NEW_ CHG_ADDRESS
Second Address Update	Instruction	HR_INST_VIEW_FUTURE_ CHANGES

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Phone Numbers Details Page

Region	Flex Name	Flex Code
Phone Number Details	Additional Telephone Number Details	PER_PHONES

Phone Details Review Page

Region	Flex Name	Flex Code
Details Review	Additional Telephone Number Details	PER_PHONES

Configurable Profile Options

Not applicable

Dependents and Beneficiaries

The Dependents and Beneficiaries module stores the names and contact information for a user's dependents and beneficiaries. When the user has created or edited a dependent or beneficiary, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the dependent or beneficiary until the addition or change has been approved or rejected by the approver.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

Not applicable

Configurable Tips and Instructions

Contacts Page

Region	Tip Type	Message Name
Contacts Main Table Region	Instruction	HR_289383_CONT_EMRG_ MAIN_MSG
Contacts Main Table Region	Long Message	HR_TIP_SUFFIX
Contacts Main Table Region	Long Message	HR_TIP_PREFIX
Contacts Main Table Region	Long Message	HR_289372_EMRG_CONT_ FLAG_TIP
Contacts Main Table Region	Long Message	HR_289373_PRMRY_REL_ MAIN_TIP
Contact Phone Numbers	Instruction	HR_INT_PHONES_FORM
Contact Address	Instruction	HR_INST_MAIN_CORRECT_ ADDRESS
Contacts Main Table Region	Instruction	HR_289371_DEP_BNF_ FLAG_TIP

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Emergency Contacts

The Emergency Contacts module stores the contact information for emergency contacts. Self-service users can add and delete people from the list of emergency contacts as required. When the user has created or edited a contact, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the contact until it has been approved or rejected by the approver.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Personal Information
Employee Self Service	Personal Information

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Contacts

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Contacts Page

Region	Tip Type	Message Name
Contacts Main Table Region	Instruction	HR_289383_CONT_EMRG_ MAIN_MSG
Contacts Main Table Region	Long Message	HR_TIP_SUFFIX
Contacts Main Table Region	Long Message	HR_TIP_PREFIX
Contacts Main Table Region	Long Message	HR_289371_DEP_BNF_ FLAG_TIP
Contacts Main Table Region	Long Message	HR_289373_PRMRY_REL_ MAIN_TIP
Contact Phone Numbers	Instruction	HR_INT_PHONES_FORM
Contact Address	Instruction	HR_INST_MAIN_CORRECT_ ADDRESS

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Professional Details Modules

There are five modules within Professional Details: Competence Profiles, Education and Qualifications, Other Professional Awards, Work Preferences, and Resume. In addition, there are two modules for the US localization (Tenure Tracking and Academic Rank). Employees can maintain their own details or managers can maintain the details for their direct reports.

Education and Qualifications

This module allows users to add qualifications to an existing list of qualifications or to create a new list of qualifications. The user can also add, edit, and delete the major subjects for the qualifications. When the user has created or edited a qualification, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

The Education and Qualifications overview page shows the list of approved education qualifications for a person and also those qualifications that are pending approval.

> **Important: Personalizing Table Header Prompts for Education and Qualifications**
>
> With the introduction of version 11.i.10 of the Oracle Applications Framework (OAF), Oracle has changed the definition of some elements in the Education and Qualifications Review page. If you have previously personalized this page by changing the table header prompts for the tables within the Education and Qualifications Review page, Oracle recommends that you check the personalizations and make the changes again if necessary.
>
> See: Configuring Web Pages, page 5-15

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Education and Qualifications Mgr
Employee Self Service	Education and Qualifications

: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Education and Qualifications

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Education and Qualifications Overview Page

Region	Tip Type	Message Name
Qualification Approved Header	Instruction	HR_INST_NO_QUALIFICATION_FOUND
Qualification Overview Page	Instruction	HR_INST_ADD_QUALIFICATION
Qualification Approved Header	Instruction	HR_INST_QUALIFICATION_FOUND

Add Qualifications Page

Region	Tip Type	Message Name
Qualification Add Main Page	Instruction	HR_INST_NEW_QUALIFICATION
Qualification Add Main Page	Instruction	HR_INST_EDIT_QUALIFICATION
Add Qualification Add School		HR_INST_SCHOOL_NAME

Add Subject Page

Region	Tip Type	Message Name
Qualification Add Subject Main Page	Instruction	HR_INST_AWARD_ADD_SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_AWARD_EDIT_SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_QUA_ADD_SUBJECT
Qualification Add Subject Main Page	Instruction	HR_INST_QUA_EDIT_SUBJECT

: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Add Qualifications Page

Region	Flex Name	Flex Code
Qualification Add Qualification	Additional Qualification Details	PER_QUALIFICATIONS
Qualification Add Qualification	Further Qualification Information	Qualification Developer DF
Add Qualification Add School	Additional Establishment Attendance Details	PER_ESTABLISHMENT_ ATTENDANCES

Add Subject Page

Region	Flex Name	Flex Code
Add Subject	Additional Subjects Taken Details	PER_SUBJECTS_TAKEN
Add Subject	Further Subject Information	Subject Developer DF

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Free Text School Name Allowed in Self Service	All	Null, Yes/No	Null

The following profile option controls a user's ability to enter school names

HR: Free Text School Name Allowed in Self Service

Users can add a school names either in free text, or they can select the school name from a list of values. You can prevent users from entering the school name in free text and only allow them to select the school name from a list of values, by setting the profile option HR: Free Text School Name Allowed in Self Service. If this is set to Yes or Null (the default), then free form entry of the school name will be possible. If you set this profile option to No, the list of values will be used to validate the entry of the school name.

Other Professional Awards

This module allows users to add additional professional awards to an existing list of awards or to create a new list of professional awards. Professional awards include licenses and professional qualifications. Academic awards are entered in the Education and Qualifications page. When the user has created or edited an award, the workflow submits the transaction for approval. If the transaction is awaiting approval, the user cannot edit the qualification until it has been approved or rejected by the approver.

Important: Personalizing Table Header Prompts for Other Professional Awards

With the introduction of version 11.i.10 of the Oracle Applications Framework (OAF), Oracle has changed the definition of some elements in the Other Professional Awards Review page. If you have previously personalized this page by changing the table header prompts for the tables within the Other Professional Awards page, Oracle recommends that you check the personalizations and make the changes again if necessary.

See: Configuring Web Pages, page 5-15

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Other Professional Awards Mgr
Employee Self Service	Other Professional Awards

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Other Professional Awards

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Awards Page

Region	Tip Type	Message Name
Awards Add Main Page	Instruction	HR_INST_NEW_AWARD
Awards Add Main Page	Instruction	HR_INST_EDIT_AWARD

Other Professional Awards Overview Page

Region	Tip Type	Message Name
Award Approved Header	Instruction	HR_INST_NO_AWARD_ FOUND
Award Approved Header	Instruction	HR_INST_AWARD_FOUND
Award Overview Page	Instruction	HR_INST_ADD_AWARD

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Awards Page

Region	Flex Name	Flex Code
Awards Add Qualification	Additional Qualification Details	PER_QUALIFICATIONS
Awards Add Qualification	Further Qualification Information	Qualification Developer DF

Add Subject Page

Region	Flex Name	Flex Code
Add Subject	Additional Subjects Taken Details	PER_SUBJECTS_TAKEN
Add Subject	Further Subject Information	Subject Developer DF

Configurable Profile Options

Not applicable

Competency Profile

The Competency Profile enables the user to record a set of competencies for an individual. Competencies include knowledge, skills, and personal or professional attributes. Access to the competencies function may be restricted to specific users, for example, the line manager. There is the need for a security mechanism to define who can maintain competencies for which employees.

The Competency Profile Overview page has three sections:

- Current competencies
- Current session changes
- Competencies pending approval

In the Competency Profile Overview page, you can:

- View the Competency Profile History
- Add additional competencies
- Update competency levels
- Correct existing competencies
- Correct or delete session changes

In the Add Competency page, you can:

- Search for competencies to add to your profile using a basic or advanced search
- Assign default competencies based on a job profile
- Add additional information on competencies

In the New Levels Attained page, you can

- Enter information on the competency level attained

All pages allow you to validate the changes made.

A person's competencies are only valid in the context of the proficiency level at which they demonstrate each competency. A competency definition associated with a competency profile typically 'ends' when a new level of the competency is attained. Typically, a person may have a continuous series of records for a given competency showing progression from one level to the next. The levels for a given competency can fluctuate over time. A given competency can also become obsolete within a person's competency profile.

Proficiency scales can vary with each competency so it is essential that the user has access to the descriptions for the competency, its associated levels, and its behavioral indicators wherever a competency and scale is displayed. The proficiency levels must be displayed dynamically depending on the selected competency.

The user can copy the competencies defined for the job or position related to a person's assignment across to their competency profile using the Default Competencies button in the Add Competency page. However, the user must update the proficiency level manually as this is not copied across.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Competency Profile Mgr
Employee Self Service	Competency Profile

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Competency Profile

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Correction Page

Region	Tip Type	Message Name
Correction Main Page	Instruction	HR_COMP_CORRECTION_SS

Current Changes Page

Region	Tip Type	Message Name
Current Changes Main Page	Instruction	HR_COMP_CORRECTION_SS

See: Adding Instructions to a Web Page, page 5-22

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Work Preferences

The Work Preferences function enables users to store information about their preferred work location and their relocation and travel preferences. Employees can enter the information for themselves and managers can enter the information for their direct reports.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Work Preferences Mgr
Employee Self Service	Work Preferences

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Work Preferences	Instruction	HR_INST_WORK_ PREFERENCES

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Resume

The Resume module enables you to use standard attachment functionality to store and update their own resume. You can upload a resume, add a link (URL) to an online resume, or edit the resume text. A manager can also store a resume for an employee or worker or update the resume with new information.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Resume Mgr
Employee Self Service	Resume

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Resume	Instruction	HR_INST_TEXT_RESUME

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Tenure Status (US)

Tenure is a unique term in the "Education Industry" that means the completion of professional criteria and an extended probationary period. This results in a person attaining permanent employment with the institution. The Tenure Status module captures the following information:

- Tenure status
- Date determined
- Projected tenure date
- Adjusted tenure date
- Reason for adjustment
- Subject to tenure quota?

Menu and Function Names

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

User Menu Name	Function Name
Manager Professional Details	Tenure Status
Professional Details	Tenure Status Overview
Employee Self Service	Tenure Status
Manager Self Service	Tenure Status

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Tenure Status

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Region	Attribute Name	FlexField Name
Tenure Status Flex	Descriptive Flexfield	Extra Person Info DDF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Academic Rank (US)

The Academic Rank module is a method for promotional progression within Higher Education. The Academic Rank module captures the following information:

- Academic rank
- Start date and end date
- Next academic rank
- Projected date

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Academic Rank
Manager Self Service	Academic Rank

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Academic Rank

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Region	Attribute Name	FlexField Name
Academic Rank Flex	Descriptive Flexfield	Extra Person Info DDF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Employee Directory

The Employee Directory Module

The Employee Directory provides an easily accessible, highly configurable lookup of people within your enterprise. Users can search for a specific person against a range of data, and navigate through the organization to view details of a person's manager or direct reports. You can set up the Employee Directory to search for people from a single business group or from multiple business groups as required.

The directory extracts information from the Employee Directory repository. The repository tables hold a snapshot of de-normalized HRMS data. In addition, users can upload their personal picture to the repository.

The Employee Directory includes the following features:

- **Anonymous access to the Employee Directory repository with simple and advance search features**

  You can provide users with anonymous access to the read-only directory. Users can use basic or advanced search facilities to find people and their assignment details.

- **Controlled access to the HRMS data during major reorganization processes within the company**

  The repository data is independent of the HRMS data, and therefore remains static if your organization is undergoing internal change. The directory data will not change until you refresh the repository.

- **Constant and immediate availability**

  The directory is available continuously, and supports concurrent users.

- **Presentation of complex Oracle HRMS data**

  The associated HRMS data is de-normalized into the Employee Directory repository tables, enabling users to view a range of data relating to workers and their assignments in a simple layout. In addition, the directory is not dealing with temporal data.

- **Time zone support**

  The Employee Details page can display the local time at the worker's location.

- **MLS support**

  If your configuration includes the MLS dictionary, you can display organization, position, and job values in the local language.

- **Multi-assignment support**

  You can view multiple assignments for each worker.

- **Support for multiple data sources**

  You can import data from heterogeneous data sources.

Search Facility

The simple search field enables users to enter a value to match against any of the following columns in the repository for the worker's primary assignment:

- First Name
- Last Name
- Full Name
- Preferred Name
- E-mail Address
- Work Phone Number
- Alternate First Name
- Alternate Last name

  Note: To search on a telephone number enter the numbers only, without spaces or other characters. The telephone number search format can be altered using the override packages. For an example, see: Customer Override for Single Sign On, page 8-30

The Advanced Search page enables users to search on multiple values. You can configure this page to display the most appropriate search fields for your requirements.

See Configuring Web Pages, page 5-15

Deploying the Employee Directory

You can choose to deploy the Employee Directory in any of the following ways:

- **Self Service Personal Home Page**

  Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

  See: Self-Service Menus and User Access, page 3- 9

  The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-24 to configure this menu.

- **Portal**

  For information on configuring Portal, see the following notes on MetaLink:

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=132035.1

Populating the Employee Directory

Before you can use the Employee Directory you must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 8-31

Editing Personal Details

From the directory, users can log on to Self Service modules to update their personal information. For example, a user can log on to the employee directory to update a phone number or change name information. See: Enabling Single Sign On to Self Service, page 8-30

Personal Picture

Users can upload their personal picture into the repository using the Update Profile page if you have enabled Single Sign On. See: Enabling Single Sign On To Self Service, page 8-30.

The repository stores the images as locally.

Name Fields

The Display Name is a format which is used in the following places:

Page	Item
Employee Detail	Header title (Employee Detail Region)
	Name
	Tree
	Manager
	Representative1
	Representative2
	Representative3
	Representative4
Organization Hierarchy	Employee Name
Simple Search	Employee Name
Advanced Search	Employee Name
Employee Profile	Page title
Profile Preview	Page title

You can change the format of the Display Name by using the override procedures. The change will affect the format of the name in all of the above items.

The following fields display a value depending on the legislation associated with a person:

Field name	Description
First Name	Displays a value for the person's first name
Last Name	Displays a value for the person's last name
First Name Alternate	Displays a multi-byte first name
Last Name Alternate	Displays a multi-byte last name

The values held by each of the above fields can be altered by using the override procedures.

See: Setting Up Legislation and Customer Overrides, page 8-33

You can configure the pages at the required levels to display whichever name fields are appropriate for your enterprise.

Page Layout Configuration

You can configure the Employee Detail page at all personalization levels. You can configure the other pages at Function, Responsibility, User, and Site levels.

> **Note:** Responsibility and User level personalizations are not available for Anonymous access.

On the Employee Detail page, the application automatically displays the Employee Detail region. If you enable other regions, the application will only display them if they contain data.

If you enable additional telephone number fields, map them to a lookup code of type "PHONE_TYPE".

See: Configuring Web Pages, page 5-15

Menu and Function Names

User Menu Name	Function Name
Employee Directory Functions Menu	Employee Directory

See: Defining User Access and Menus, page 2- 6

Workflow

Not applicable

Configurable Tips and Instructions

Simple Search Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_SIMPLE_SEARCH_INSTR
Search Results Region	Instruction	HR_EMPDIR_MULTI_ASG_INSTR

Advanced Search Page

Region	Tip Type	Message Name
Search Header Region	Instruction	HR_EMPDIR_ADV_SEARCH_INSTR
Search Results Region	Instruction	HR_EMPDIR_MULTI_ASG_INSTR

Employee Detail Page

Region	Tip Type	Message Name
Employee Detail Cell	Instruction	HR_EMPDIR_EMPDETAIL_INSTR

Organization Hierarchy Page

Region	Tip Type	Message Name
Hierarchy Region	Instruction	HR_EMPDIR_HIERARCHY_INSTR

Employee Profile Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_EDITPROFILE_INSTR
Photo Region	Instruction	HR_EMPDIR_PIC_INSTR
Edit Employee Information Region	Instruction	HR_EMPDIR_EMPUPD_INSTR

Picture Preview Page

Region	Tip Type	Message Name
Page Layout Region	Instruction	HR_EMPDIR_PREVIEW_PIC_INSTR

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

With anonymous login, the application has no context of business groups, responsibilities, or personal profiles, to support flexfields. However, you can import flexfields using the override packages. If you do so, it is your responsibility to map the flexfields to MLS if you require multi-lingual support.

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Employee Directory Global Menu	Site	Any menu name with menu type of Global	Employee Directory Global Menu
Server Timezone	Site, User	List of values based on FND_TIMEZONES_VL	None

HR:Employee Directory Global Menu

This system profile enables you to specify a menu to provide global buttons in addition to the standard Self Service Global Menu buttons when the Employee Directory is accessed anonymously.

Server Timezone

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Employee Details page.

> **Note:** The Client Timezone profile option also exists within Oracle applications. If you enable this profile option at User level, there will be implications for other windows and pages. This is because other DATETIME fields on other windows and pages are automatically converted to the time zone defined by the Client Timezone profile. This time zone may be inconsistent with the time zone defined by the Server Timezone profile option. To avoid this situation, the system administrator should carry out the following steps:
>
> - Prevent the Client Timezone profile option being set at the User level. To do this, use an Application Developer responsibility to change the delivered profile option definition. See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*
> - Use the Personalization Framework functionality to remove the Time Zone field from the Preferences page.

Anonymous Access to the Employee Directory

Follow the steps below to set up anonymous access and to configure the global button bar.

To provide users with anonymous access to the Employee Directory:

1. Ensure your HTML form includes an Action referencing "/OA_HTML/EmpdirLogin.jsp". This action takes the user to the simple search field, logged in anonymously. See the example code below.
2. Ensure the HTML form has the following two elements:
   - A Text element with the name "srchText"

     This element places a text field in your form into which the user can enter search criteria in order to access people in the Employee Directory.
   - A Hidden element with the name "L", and the required language code for MLS

     This element provides field labels and data for the directory in the chosen language.

   See the example code below.
3. Function level personalization is not automatically available for anonymous access. If you want to enable Function level personalization, add a Hidden element with the name "OAFunc" pointing to the function being personalized.

   See the example code below.

   Example HTML form

```
<form NAME="people"
ACTION="http://qapache.us.oracle.com:5122/OA_HTML/EmpdirLogin.jsp"
 METHOD="POST" target="_top">
     <table WIDTH="100%" cellpadding="0" cellspacing="0">
     <tr><td WIDTH="1%" valign="TOP">
     <table WIDTH="130">
     <tr><td valign="TOP">
     <input TYPE="text" NAME="srchText" SIZE="9">
     <input TYPE="hidden" NAME="L" value="US">
     <input TYPE="hidden" NAME="OAFunc" value="ORACLE_PROXY_SS">
--this line is optional
</form>
```

To configure the Global Buttons for anonymous login:

1. If you require additional buttons, such as Files Online, or Calendar, make entries to the Employee Directory Global Menu, or to any customer defined menu of menu type Global.

   Note: Global buttons are defined as FND Form functions.

2. Set the system profile HR:Employee Directory Global Menu to point to the Employee Directory Global Menu (the default), or the menu you have defined in the previous Step.

Enabling Single Sign On to Self Service

The Employee Directory is read only. To enable users to edit their personal information, or to add or edit their image, follow the procedures below to provide them with single sign on access to Self-Service:

1. Define an FND user for each person that requires access to Self-Service, if they are not defined as FND users already.

   See: Defining User Access to Self-Service Functions, page 2- 7

2. In the Descriptive Flexfield Segments window, configure a segment in the Additional Personal Details Descriptive flexfield to hold the FND_USER names, using any available attribute.

   See: Defining Descriptive Flexfield Structures, *Oracle Applications Flexfields Guide*

3. Map the segment to the USER_NAME column in the PER_EMPDIR_PEOPLE repository table by editing the PER_EMPDIR_PEOPLE_OVERRIDE package body. See: Customer Override for Single Sign On, page 8-30

Enabling Customer Overrides for the Employee Directory

You can use overrides with the Employee Directory to customize the fields available when you synchronize the data from Oracle HRMS tables with the Employee Directory repository tables. For example, to enable single sign on to self-service applications from the Employee Directory, you can perform a customer override to add your FND_USER names to the directory. This means that the Employee Directory repository tables are modified in line with the customer or legislation override.

> **Note:** If legislation and customer overrides exist, customer overrides take precedence over legislation overrides.

All customer override package bodies are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information on overrides, see: Legislation and Customer Overrides, page 2- 4 .

Set up Customer Override for Single Sign On:

1. Open the package body PER_EMPDIR_PEOPLE_OVERRIDE in a text tool.
2. Modify the line

   ```
   g_override_flg BOOLEAN := FALSE;
   ```

   to

   ```
   g_override_flg BOOLEAN := TRUE;
   ```

   This change enables the override package.
3. Add the following code into the before_dml procedure:

```
IF p_srcSystem = 'PER' THEN
   per_empdir_ss.personTbl.person_key(p_rec_locator) :=
            upper(per_empdir_ss.personTbl.attribute26(p_rec_locato
r))
            ||' '||per_empdir_ss.personTbl.person_key(p_rec_locato
r)
            ||' '||substr(personTbl.work_telephone(p_rec_locator),

                                length(personTbl.work_telephone(p_
rec_locator))-4, 4);
   per_empdir_ss.personTbl.user_name(p_rec_locator) :=
            upper(per_empdir_ss.personTbl.attribute26(p_rec_locato
r));
END IF;
```

Instead of "attribute26", use the attribute name you used to configure the segment in the Additional Personal Details Descriptive flexfield.

The preceding code assigns the user name to an available column in the repository. In addition it adds the user name to the person_key, which enables searches on the user name.

It also formats the work telephone number and adds it to the person_key, enabling searches on a preferred telephone format. This is where you can determine how the telephone number is formatted for the simple search field.

Populating the Repository

Use the following procedures to load HRMS data into the Employee Directory repository. Prior to loading the data, you can optionally configure the data for your legislation and country requirements.

1. Use the supplied override packages to override values in the repository table columns for individual legislation teams and customers if required. The overrides are effective when you refresh the repository in either Complete or Incremental refresh mode.

   See: Setting up Legislation and Customer Overrides, page 8-33

2. In the Submit Request window, run the concurrent program Refresh Employee Directory. This program populates the repository with data from HRMS tables.

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

   The Refresh Employee Directory concurrent program uses the following parameters:

Parameter	Options	Description
Refresh Mode	Complete/Incremental	Use the Complete refresh mode for the initial population of data to the Employee Directory repository tables and intermittently in the future. A Complete refresh rebuilds all the data in the repository and clears deletes. This process requires downtime. Perform a full refresh once every six months or so to clear deletes from the repository, depending on the rate of staff turnover. Use Incremental refresh mode at regular intervals to synchronize the data between Oracle HRMS and the Employee Directory. The frequency depends on how current you require the data to be.
Refresh Date	Leave this blank to use the system date.	The concurrent program will collect data applicable to this date. **Warning:** *Oracle recommends you leave this parameter blank for scheduled refreshes.* If you insert a date, every time the concurrent program runs, it will collect data for the same date - in other words, the data will never be updated.
Source System	A valid host system	This parameter identifies the host system. You should select 'PER'. By default 'PER' identifies Oracle HRMS.
Process Multiple Assignments	Yes/No (default)	Use the default option of No to process only primary assignments. Set it to Yes to process secondary assignments as well.

Note: If you run the Refresh Employee Directory concurrent program in Complete Refresh mode with Process Multiple Assignments set to Yes, subsequent runs in Incremental Refresh mode with Process Multiple Assignments set to No will have no effect. Incremental Refresh mode does not remove previously populated secondary assignments.

Conversely, if you run this program in Complete Refresh mode with Process Multiple Assignments set to No, then subsequently run in Incremental Refresh mode with Process Multiple Assignments set to Yes, secondary assignments will be populated.

Legislation and Customer Overrides for Employee Directory

When you refresh the repository data, the system calls override packages to populate the repository tables with data from Oracle HRMS. You can edit these packages to override values at legislation or customer level.

All customer override package bodies for the Employee Directory are in the peredcor.pkb file, in the $PER_TOP/patch/115/sql directory. The legislation override package body is in the peredlor.pkb file, in the $PER_TOP/patch/115/sql directory.

For more information, see: Customer and Legislation Overrides, page 2- 4 .

1. Identify which segments you want to override for any table in the Employee Directory repository, and note the attribute name for each.

2. Identify the correct override call to edit.

   The following table shows which Employee Directory repository tables map to the Oracle HRMS tables:

Entities Denormalized from Oracle HRMS

EMPDIR table name	HRMS table name
PER_EMPDIR_PEOPLE	PER_ALL_PEOPLE_F
PER_EMPDIR_ASSIGNMENTS	PER_ALL_ASSIGNMENTS_F
PER_EMPDIR_ORGANIZATIONS	HR_ALL_ORGANIZATION_UNITS, HR_ ALL_ORGANIZATION_UNITS_TL
PER_EMPDIR_JOBS	PER_JOBS, PER_JOBS_TL
PER_EMPDIR_POSITIONS	HR_ALL_POSITIONS_F, HR_ALL_POSIT IONS_TL
PER_EMPDIR_LOCATIONS	HR_LOCATIONS_ALL
PER_EMPDIR_LOCATIONS_TL	HR_LOCATIONS_ALL_TL
PER_EMPDIR_PHONES	PER_PHONES

The following table shows which override call to use to override values in the repository tables at legislation or customer levels.

Legislation and Customer Override Calls

Table	Legislation Override Call	Customer Override Call	Record Structure (Instance)
PER_EMPDIR_PEOPLE	PER_EMPDIR_LEG_OVERRIDE. PEOPLE	PER_EMPDIR_PEOPLE_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS.PersonTblType (personTbl)
PER_EMPDIR_ASG	PER_EMPDIR_LEG_OVERRIDE. ASG	PER_EMPDIR_ASG_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. AsgTblType (asgTbl)
PER_EMPDIR_ORGS	PER_EMPDIR_LEG_OVERRIDE. ORGS	PER_EMPDIR_ORGS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. OrgTblType (orgTbl)
PER_EMPDIR_JOBS	PER_EMPDIR_LEG_OVERRIDE. JOBS	PER_EMPDIR_JOBS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. JobTblType (jobTbl)
PER_EMPDIR_POSITIONS	PER_EMPDIR_LEG_OVERRIDE. POSITIONS	PER_EMPDIR_POSITIONS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. PosTblType (posTbl)
PER_EMPDIR_LOCATIONS	PER_EMPDIR_LEG_OVERRIDE. LOCATIONS	PER_EMPDIR_LOCATIONS_OVERRIDE. BEFORE_DML	PER_EMPDIR_SS. LocTblType(locationTbl)

3. In the package body modify the line

   ```
   g_override_flg BOOLEAN := FALSE;
   ```

   to

   ```
   g_override_flg BOOLEAN := TRUE;
   ```

   This change enables the override package.

4. Edit the procedure to override data, using the attribute name you identified in Step 1. For an example showing how to edit an override call, see: Customer Override for Single Sign On, page 8-30

If you have enabled the override packages, they are called when the repository data is refreshed. See: Populating the Repository, page 8-31

Manage Employment Events

Manage Employment Events Modules and Workflow

The Manage Employment Events module groups together workflow processes that relate to changes in an employee's assignment. The functions available enable you to control all actions relevant to your employees in your organization, from hiring employees through their separation from the organization.

You can build and configure these workflow processes to suit the requirements of your enterprise. The basic Manage Employment Events modules are: Assignment, Location, Work Schedule, Change Manager, Employee or Contingent Worker Termination (containing Termination and End Placement), Employee or Contingent Worker Pay (containing Pay Rate and Assignment Rate), Individual Compensation Distributions, Special Information Types, and Other Employment Information.

Chained Manage Employment Events Processes

Oracle Workflow enables you to combine different Manage Employment Events modules into one workflow process. Such processes are known as chained processes. SSHR includes a number of predefined chained processes that appear as functions on the user menus.

> **Note:** You can also include the Individual Compensation Distributions (ICD) module in chained processes, if required.

The following table gives a list of the delivered chained processes.

Manage Employment Events Chained Processes:

Manage Employment Events Chained Process	Contains the following Manage Employment Events modules:
Change Pay	Employee or Contingent Worker Pay
Change Conditions	Assignment, Location, Work Schedule
Change Cost Center, Terms and Manager	Assignment, Other Employment Info, Location, Change Manager
Change Cost Center, Location and Manager	Assignment, Location, Change Manager
Change Extra Information Types	EIT, EIT Update
Change Hours	Work Schedule, Pay Rate
Change Job	Assignment
Change Job and Terms	Assignment, Other Employment Info
Change Location	Location
Change Manager	Change Manager
Change Pay Rate Process	Employee or Contingent Worker Pay
Change Special Information Types	SIT, SIT Update
Change Supervisor Process	Change Supervisor
Deploy Person	Assignment, Location, Work Schedule, Change Manager
Worker Status Change	Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay, SIT
Change Worker Status and Terms	Assignment, Other Employment Info, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay
ICD and Termination Integration	Termination Page, Change Manager
Employee or Contingent Worker Termination (Termination, End Placement)	Termination (or End Placement) Page, Change Manager, Organization Manager Detail
Termination with Compensation	Termination Page, Change Manager, Organization Manager Detail, Other Compensation
Transfer	Assignment, Location, Change Manager, Work Schedule, Employee or Contingent Worker Pay

Ordering Manage Employment Events Workflow Processes

The order of workflow processes must be carefully designed to ensure business rules are maintained and implemented. If you choose to create your own chained processes and functionality, you must consider the following rules when designing the sequence of functions:

Function	Restriction
Assignment	If the Assignment module is present in a chained process, it must appear first.
Change Manager	If used in a chain with Employee or Contingent Worker Termination, it should follow the Termination or End Placement page.
Extra Information Types	Can appear anywhere in the chain
Individual Compensation Distributions	Can appear anywhere in the chain
Location	Can appear anywhere in the chain
Other Employment Information	Can appear anywhere in the chain
Employee or Contingent Worker Pay (Pay Rate, Assignment Rate)	Can appear anywhere in the chain
Special Information Types	Can appear anywhere in the chain
Employee or Contingent Worker Termination	If used in a chain with Supervisor, it should precede Supervisor

You can configure your own processes in any number of ways but they must comply with the restrictions listed above. For example, you could configure a process that follows this sequence:

- Step 1: Assignment
- Step 2: Location
- Step 5: Work Schedule

But, you cannot configure a process in this order, as you will break business rules:

- Step 2: Location
- Step 1: Assignment
- Step 5: Work Schedule

As long as you maintain the order of steps you can configure whichever workflow processes your enterprise needs.

Assignment

The Assignment module is used in some delivered Manage Employment Events menu functions, for example, the Employee Status Change chained process. It can be added in any of your own business processes that you model in the Workflow Builder.

Assigning a Salary Basis

You use a salary basis in Oracle HRMS to establish the duration of a salary. For example, an hourly salary basis (for example, 1,000 yen per hour) or an annual salary basis (for example, 18,000 pounds per year).

For more information on salary bases, see Salary Basis, *Oracle HRMS Compensation and Benefits Management Guide*.

If you enable the Salary Information region, users can assign newly hired employees and workers to a salary basis, or change the salary basis of an existing employee or worker. If they change the salary basis mid-way through a payroll period, the application ends the existing salary element entry. This may not be desirable for payroll calculations, therefore if a user changes the salary basis of an employee or worker assigned to a payroll on any effective date other than the first day of the payroll period, the application sends a notification to a payroll contact as part of the approval process. The payroll contact can accept or reject the change, or return it to the originator requesting a change to the effective date (normally setting it to the first day of the next payroll period).

> **Note:** This notification is sent only for employees and workers assigned to a payroll. Also, this notification is sent to your payroll contact only if you have enabled approvals for this transaction. You must also set up the payroll contact using a workflow item attribute (Payroll Contact User Name). This notification is only sent for *changes* to salary basis and not for new hires or the first assignment of a salary basis to an existing employee or worker.

If you want to enable self-service users to assign a salary basis, you must enable the Salary Information region item in the HR_ASSIGNMENT_SS and HR_ASSIGNMENT_REVIEW_SS regions.

If a salary basis is assigned without a pay proposal, the Description and Salary fields on the Pay Rate page will be mandatory if the profile option HR: Base Salary Required is set to Yes.

Multiple Assignments

If an employee or worker has more than one assignment, the manager must select the relevant assignment before carrying out the employee action.

> **Note:** To enable a manager to select an assignment, the profile option HR: Enable Multiple Assignments in SSHR must be set to Yes at the required level.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Assignment

The Assignment module is used in several example chained processes including:

- Employee Status Change
- Change Job
- Transfer

Configurable Workflow Attributes:

Function Activity Display Name	Function Activity Attribute Display Name
Assignment	Use Grade Points
	Set Grade Ceiling
	Use Step/Grade No Update
	Display Job Attachment
	Display Position Attachment
	HR Element Warning
	Asg Change Reason Lookup Codes
	HR Use Default Location
Item Level Attributes	Item Attribute Display Name
	Payroll Contact User Name

See: Configuring Workflow Attribute Values, page 4- 8

Use Grade Points

Defines whether the ceiling point can be displayed.

Set Grade Ceiling

Defines whether the ceiling point can be updated.

Use Step/Grade No Update

Defines whether the grade can be changed if grade steps exist.

HR Element Warning

Controls whether hr element changes are displayed as a warning or an error.

Asg Change Reason Lookup Codes

Allows system administrator to specify which change reason lookup codes should be displayed (subset of change reason lookup codes). You enter the codes as follows:

- Reason1|Reason21|...

Display Job Attachment

Whether attachments are displayed for the job when there are no job comments. If there are comments for the job, no attachments are displayed.

Display Position Attachment

Whether attachments are displayed for the position when there are no position comments. If there are comments for the position, no attachments are displayed.

HR Use Default Location

The location can be changed to the default organization or position locations. If the organization/position is then changed for a user, the user's location will be the default location for the organization/position.

Payroll Contact User Name

The Applications user name of the payroll representative who should be notified when a user changes a salary basis in the middle of a payroll period. This attribute is mandatory if you use the Salary Basis functionality.

Configurable Tips and Instructions

Assignment Page

Region	Tip Type	Message Name
Assignment	Instruction	HR_INST_TOP_COMMON_TEXT
Job	Instruction	HR_INST_ASG_JOB_SS
Position	Instruction	HR_INST_ASG_POSITION_SS
GRE	Instruction	HR_INST_ASG_GRE_SS
Payroll	Instruction	HR_INST_ASG_PAYROLL_SS
Location	Long Message	HR_INST_CHANGE_LOCATION
Location	Long Message	HR_INST_WORK_AT_HOME_LOC

* These instructions are delivered as hidden, although they can be displayed and personalized.

Configurable Flexfields

Assignment Page

Region	Flex Name	Flex Code
Specific Job Information	HrFlex1	Job Developer DF
Extra Position Information	HrFlex1	Extra Position Info DDF
Department Working Conditions	HrFlex1	Org Developer DF
People Group	People Group Key Flex	GRP
Other Assignment Information	Additional Assignment Details	PER_ASSIGNMENTS
Statutory Information	Work Sched Key Flex	GRES_AND_OTHER_DATA

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Use Grade Defaults	Site, Application, Responsibility, User	Yes/No	Yes
HR:Override Grade Defaults	Site, Application, Responsibility, User	Yes/No	No

The following profile options control a user's ability to use grade defaults.

HR:Use Grade Defaults

If this profile value is Yes, the user can only select a valid grade for a parent organization, job, or position. The list of values for the Grade field is determined by the entry in the Organization, Job, or Position field.

If this profile value is No, the user can select any grade for the organization, job, or position.

HR:Override Grade Defaults

If this profile value is Yes (and the HR:Use Grade Defaults profile is also Yes), the user can select a different (non-default) grade for an organization, position, or job.

If this profile value is No, the user cannot override the default grade.

Termination

The Termination page enables a manager to end an employment relationship. When the manager selects the Termination function from the menu, a person hierarchy is displayed to enable the manager to select an employee or contingent worker for termination. This hierarchy is usually supervisor or position-based.

For more information on the hierarchy, see Enter Process, page 7- 3 .

Multiple Assignments and Termination

If your organization uses multiple assignments and assignment-level security is enabled, it may be the case that an assignment-based hierarchy only displays a subset of a person's assignments. A person may have secondary assignments that are not visible to the manager.

For more information on security, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

> **Important:** A manager can only terminate an employee if he or she has access to the primary assignment for the person. If a manager only has access to a secondary assignment, the termination process is cancelled and an error message is displayed. An error message is also displayed if a manager tries to terminate a person and that person has other assignments.

Change Manager Function

If the terminated employee or worker has direct subordinates, the system automatically displays the Change Manager page to reassign the terminated supervisor's subordinates to another supervisor.

In the event of the employee or worker also being a manager to an organization, the Update Organization Manager page may appear for you to assign a new manager. This depends on how your security profile is set up.

For more information see: Organization Manager, page 8-60

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Termination Process

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Termination Process	Termination Page	Termination Reason Lookup Codes

Configurable Tips and Instructions

Termination Page

See: Configuring Web Pages, page 5-15

Region	Tip Type	Message Name
Termination Details	Long Message	HR_INST_TERMINATION

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Termination Page

Region	Flex Name	Flex Code
Termination Details	Additional Period of Service Details	PER_PERIODS_OF_SERVICE
Termination Details	Additional Period of Service Information	PER_PDS_DEVELOPER_DF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

End Placement

The End Placement page enables a manager to end a contingent worker's work relationship and specify a reason. This changes the person type to Ex-Contingent Worker and ends all assignments. If the contingent worker has direct subordinates, the system will automatically display the Change Manager page to reassign the contingent worker's subordinates to another supervisor.

If the contingent worker is also a manager of an organization, the Update Organization Manager page may appear to enable you to assign a new manager. This depends on how your security profile is set up.

See: Ending a Placement, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Organization Manager, page 8-60

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Termination Process	Main Process
Employee or Contingent Worker Termination	Sub Process

The Termination process uses the sub process Employee or Contingent Worker Termination. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Termination page (Selected Person Type = Employee) and the End Placement page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Not applicable.

Configurable Tips and Instructions

Termination Page

Region	Tip Type	Message Name
Termination Details	Long Message	HR_INST_CWK_TERMINATION

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Termination Page

Region	Flex Name	Flex Code
Termination Details	Additional Period of Placement Details	PER_PERIODS_OF_SERVICE

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Work Schedule

The Work Schedule workflow process enables a manager to change the work schedule and employment category for an employee or worker. A work schedule is the number of days and hours worked and the start and end times for the employee or worker. The employment category defines the type of employment, for example, full and part-time employment.

> **Note:** Part of the Work Schedule page information is displayed from the Soft Coded Key Flexfield.
>
> See Configuring Flexfields, page 5-20

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Work Schedule

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Work Schedule	Long Message	HR_INST_WORK_SCHED_MAIN
Work Schedule	Short Tip	HR_TIP_WORK_START_TIME
Work Schedule	Short Tip	HR_TIP_WORK_END_TIME

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Region Name	Flex Name	Flex Code
Work Schedule	Soft coded KeyFlexfield	SCL
Work Schedule	Additional Assignment Details	PER_ASSIGNMENTS

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Location

The Location function enables a manager to change the work location for an employee or worker.

The Location function is available under the predefined Manager responsibility. If required, you can set up approvals processes for the Location function.

The Location region includes the Home Worker check box. This check box is available for all localizations, although it is delivered as hidden. **US users:** If you select the Home Worker check box for an employee or worker, the employee or worker is assumed, for tax purposes, to work 100% from their primary address (or tax override address if there is one) for this assignment.

For more information on the tax implications of the Home Worker check box for US users, see Entering Federal Tax Rules for an Employee, *Oracle HRMS Payroll Processing Management Guide*.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Location

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Location	Location	Hr Null Allowed
Location	Location	HR Location Required
Location	Location	Hr Use Defaults
Location	Location	Hr Override Defaults
Location	Location	HR Element Warning

HR Null Allowed:

Allows null location for an employee or worker.

HR Location Required:

Defines whether the location is required for an employee or worker.

HR Use Defaults:

The location can be changed to the default locations which are the user's Organization Location or Position Location. This is enforced by displaying the locations in a poplist.

HR Override Defaults:

The location can be changed to any global location or any location in the user's business group. The locations are displayed in a list of values if this attribute is called.

HR Element Warning:

Defines whether or not to display the HR element warning.

See: Configuring Workflow Attribute Values, page 4- 8

Configurable Tips and Instructions

Location Page

Region	Tip Type	Message Name
Change Location	Instruction	HR_INST_TOP_COMMON_TEXT
Change Location	Long Message	HR_TIP_LOCATION_CODE

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Location Page

Region	Flex Name	Flex Code
Location	Location Address	Address Location
Location	Additional Assignment Details	PER_ASSIGNMENTS

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Special Information Types (SITs)

Special Information Types (SITs) enable you to store additional information that is not currently captured by the system.

Example

Example of a Special Information Type

To capture information on an employee's linguistic ability, you could create an SIT entitled Languages with the following segments:

- Language
- Written fluency level
- Spoken fluency level

Alternatively, you could create a create an SIT to capture an employee's vehicle information and include the following segments:

- Vehicle type
- Value
- License type
- License number

See: Special Information Types, *Oracle HRMS Enterprise and Workforce Management*

Menu and Function Names

Special Information Types

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Special Information Types

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Special Information Page

Region	Tip Type	Message Name
Special Information Type Main Page	Instruction	HR_INST_SIT_OVERVIEW

Special Information Type Update Top Page

Region	Tip Type	Message Name
Special Information Type Update Page	Instruction	HR_SIT_UPDATE_ INSTRUC_TEXT_SS

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Special Information Page

Region	Flex Name	Flex Code
Special Person Information Type Details	Personal Analysis Flexfield	PEA

Special Information Type Update Top Page

Region	Flex Name	Flex Code
Special Person Information Type Review	Personal Analysis Flexfield	PEA
Special Information Type Update Page	Additional Person Analysis Details	PER_PERSON_ANALYSES

Review Page

Region	Flex Name	Flex Code
Special Information Type Review	Additional Person Analysis Details	PER_PERSON_ANALYSES
Special Information Type Review	Person Analysis Flexfield	PEA

See: Configuring Flexfields , page 5-20

Configurable Profile Options

Not applicable

Additional Configuration Steps:

1. Decide how you want to use your SIT modules:
   - standalone - as an Employee or Manager menu
   - chained - as part of a self-service action flow
   - chained - as part of a Personal Information flow

   See: Manage Employment Events Functions and Workflow, page 8-35
2. Enable your SITs using the Special Information Types form. You must enable them for each business group and select at least the Enabled and Other check boxes.

   See: Enabling Special Information Types, *Oracle HRMS Enterprise and Workforce Management*
3. Check the title of the SIT type. This title appears as the region header above the data in the self-service module.
4. Use the Personalization Framework to restrict the SIT types that are displayed. By default, all SIT types that are enabled using the above procedure are displayed in the self-service SIT module (defined by the selected person's business group), however, you can use the Personalization Framework to display only specific types.

   To display only certain special information types, personalize the HR_PERSON_SIT_DETAILS_SS region at the appropriate level (for example, responsibility or function) and in the Flex Settings box for HrSitKeyFlex, list the key flexfield structure codes of only the types you wish to appear. After each structure code, list the names of the segments you wish to appear for that special information type. Separate multiple segments with single pipe symbols (|) and separate multiple structures with double pipe symbols (||).

   > **Note:** If you list a structure code with no segment names, the special information type will not be displayed.

   If you choose to only display certain SITs, you should also personalize the HR_PERSON_SIT_UPDATE_SS region and the HR_PERSON_SIT_REVIEW_SS region to correspond to the HR_PERSON_SIT_DETAILS_SS region.

   See: Configuring Flexfields, page 5-20

Extra Information Types (EITs)

Extra Information Types (EITs) are a type of flexfield that allows you to set up unlimited amounts of extra information. They are often used by localizations for capturing local information.

Example

Example of an Extra Information Type:

You could capture a passport information for an employee or worker by creating an EIT entitled Passport Details with the following segments:

- Country
- Passport number
- Issue date
- Expiry date

See: Extra Information Types, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Although EITs and SITs are similar in appearance, configuration steps differ due to underlying structural differences. You can currently set up EITs for the following HR entities:

- People
- Assignment

Menu and Function Names

Extra Information Types

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Extra Information Types

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Extra Information Types	EIT	HR EIT TYPE

HR EIT TYPE

This attribute value defines whether the EIT is a Person or Assignment EIT. The possible values are PERSON or ASSIGNMENT, and the default value is PERSON.

See: Configuring Workflow Attribute Values, page 4- 8

Configurable Tips and Instructions

Extra Information Type Page

Region	Tip Type	Message Name
Extra Information Type Main Page	Instruction	HR_EIT_INSTRUCTION_ TEXT_SS

Extra Information Type Update Page

Region	Tip Type	Message Name
Extra Information Type Update	Instruction	HR_EIT_UPDATE_ INSTRUC_TEXT_SS

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Extra Information Type Page

Region	Flex Name	Flex Code
Extra Information Type Update	Extra Person Information	Extra Person Info DDF

Extra Information Type Update Page

Region	Flex Name	Flex Code
Extra Information Type Update	Extra Person Information	Extra Person InfoDDF
Extra Information Update Page	Extra Person Info Details	PER_PEOPLE_EXTRA_INFO

Review Page

Region	Flex Name	Flex Code
Extra Information Update Page	Extra Person Info Details	PER_PEOPLE_EXTRA_INFO

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Additional Configuration Steps

First, you choose how you want to use your EIT modules:

- standalone - as an Employee or Manager menu
- chained - as part of a Manage Employment Events flow
- chained - as part of a Personal Information flow

User responsibilities and business group legislation codes restrict the EITs that appear in a self service module. Before you can add the EIT function to an SSHR process, you must restrict the EITs available to your responsibilities. All EITs are available to all business groups and delivered responsibilities, in other words, there are no predefined legislation restrictions. All EITs are already available to the business group for your responsibility.

You enable EITs in the Information Types Security window.

1. Copy the EITs for the delivered Manager Self-Service or Employee Self-Service responsibility to a custom responsibility.
2. Delete the EITs that are not required for your responsibility.
3. Save your work.

> **Note:** The Context Description for the descriptive flexfield context value for the EIT appears as the region header in the self-service module. You configure the Context Description in the Descriptive Flexfield Segments window.

The self-service EIT module displays all EITs you enable using the above steps.

If your responsibility only covers one business group, you can specify the required EITs directly in the Information Types region. If your responsibility covers multiple business groups, you need to include the EITs from the other business groups with your responsibility.

> **Note:** We do not currently provide personalization options for EITs in self-service. The general advice on configuring flexfields does not apply to the EIT module.

Other Employment Information

The Other Employment Information module enables you to store assignment and employment information in descriptive flexfields and Developer Descriptive Flexfields (DDFs).

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Other Employment Info

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Other Employment Info	Long Message	HR_INST_TOP_COMMON_TEXT

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Region	Flex Name	Flex Code
CAGR	CAGR Flexfield	CAGR
Assignment Info	Additional Assignment Details	PER_ASSIGNMENTS
Assignment Info	Soft Coded KeyFlexField	SCL

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Pay Rate

You use the Pay Rate module to enable a manager to change a person's overall pay rate directly (Single Pay Rate) or to create component increases to the previous rate (Multiple Pay Rate). You can change pay rates independently of assignment changes or as part of an assignment change. You can also insert a salary proposal for an employee or worker with or without pay components.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Change Pay	Main Process
New Hire	Main Process
Worker Status Change	Main Process
Change Hours	Main Process
Assignment Rate/Payrate	Sub Process

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Pay Rate page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Pay	HR_P_RATE_JSP_PRC	Pay Rate, Assignment Rate

See: Configuring Workflow Attributes, page 4- 8

Configurable Tips and Instructions

Region	Tip Type	Message Name
PayRate Main	Instruction	HR_INST_TOP_COMMON_ TEXT

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Region	Flex Name	Flex Code
Pay Rate Salary Admin Flex Cell	Add'l Salary Admin Details	PER_PAY_PROPOSALS
Pay Rate Multiple Table	Proposal Component Addl Info	PER_PAY_PROPOSAL_COM PONENTS

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Base Salary Required	Site	Yes/No	Null

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.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Assignment Rate

If you are not using Oracle Services Procurement to provide purchase order information for contingent workers, the Assignment Rate module enables you to record contingent worker rates. You can change a contingent worker's rate for an existing assignment, or enter a rate for a new assignment. You select the assignment rate name from a list, select the currency, and enter a value. Optionally, you can specify an end date, after which the rate is no longer in effect.

Your implementation team defines one or more assignment rate names in the forms-based interface. An assignment rate name identifies a combination of rate type (such as Standard Rate or Weekend Rate) and rate basis (such as Hourly Rate or Weekly Rate).

If you are using Oracle Services Procurement, the Assignment Rate module displays information from the purchase order line for the assignment. You cannot update this information in the Assignment Rate page.

If you install and license Oracle Services Procurement at a later date, any rate information you recorded using the Assignment Rate module is no longer visible.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Display Name	Usage
Change Pay	Main Process
New Hire	Main Process
Worker Status Change	Main Process
Change Hours	Main Process
Assignment Rate/Payrate	Sub Process

The main processes above use the sub process Assignment Rate/Payrate. The Workflow Attribute "Selected Person Type" drives the decision to switch between displaying the Pay Rate page (Selected Person Type = Employee) and the Assignment Rate page (Selected Person Type = Contingent Worker).

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Pay	HR_P_RATE_JSP_PRC	Pay Rate, Assignment Rate

See: Configuring Workflow Attributes, page 4- 8

Configurable Tips and Instructions

Region	Tip Type	Message Name
AssignmentRatePG	Instruction	HR_ASSIGNMENT_RATE_ INST

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable.

Configurable Profile Options

Profile	Configurable Levels	Values	Default
PO: Services Procurement Enabled	Site	Yes/No	No

If Oracle Services Procurement is installed and licensed, and the user profile option PO: Services Procurement Enabled is set to Yes, assignment rate information is obtained automatically from Oracle Services Procurement.

Change Manager

The Change Manager function enables a user to perform the following operations on a selected employee or worker and assignment:

- specify which other employees or workers report to the selected manager
- reassign the selected employee or worker to report to a different manager
- reassign the subordinates of the selected employee or worker to one or more managers

Multiple Assignments and the Change Manager Function

In a manager-subordinate relationship, the manager's ID is stored against the subordinate's assignment. If the profile HR: Enable Multiple Assignments in SSHR is set to No, only primary assignments are displayed. If the profile HR: Enable Multiple Assignments in SSHR is set to Yes, other assignments will also be displayed. In situations where a subordinate employee or worker has more than one assignment, it is important to select which of the assignments is to report to the manager. In practice, this means that you may have to select between multiple assignments when you select the employee or worker for whom you are using the Change Manager function and when you select the direct reports for the selected employee or worker. In these cases, the lists of values will contain several fields (including Job, Department, Assignment Number, Location, Grade, Position, and Business Group) to help you select the correct assignment. If you are using an assignment-based security profile, you can also specify an assignment for a manager if you are reassigning a selected employee or worker, or the subordinates for the selected employee or worker, to a different manager.

> **Note:** You can choose to display the additional fields mentioned above (Job, Department, Assignment Number, and so on) as fields on the Change Manager pages using the Personalization Framework. If you display these fields, they are populated when you select a manager assignment.

If you are using assignment-level security, only those assignments for which you are the named supervisor are displayed. This means that you can only perform the Change Manager function on those available assignments.

For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

Menu and Function Names

Not applicable

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change Manager

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Change Manager	Change Manager	HR_MANAGER_REQU IRED_INDICATOR

HR_MANAGER_REQUIRED_INDICATOR

If this attribute has a value of "Y", the employee or worker must have a manager. If no manager is entered, the application generates an error. If this attribute has a value of "N", the supervisor_id field of the per_all_assignments_f record can remain blank.

See: Configuring Workflow Attribute Values, page 4- 8

Configurable Tips and Instructions

Region	Tip Type	Message Name
New Manager	Instruction	HR_INST_SUPERVISOR_MA IN
Direct Reports of Selected Employee	Instruction	HR_INST_SUPERVISOR_D IRECT
New Direct Reports	Instruction	HR_INST_SUPERVISOR_ NEW_DIRECT
Manager Update	Instruction	HR_INST_TOP_COMMON_ TEXT
Direct Reports	Long Message	HR_TIP_SUPERVISOR_DR_ DATE
New Direct Reports	Long Message	HR_TIP_SUPERVISOR_NDR_ DATE

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Organization Management

Organization Manager

The Organization Manager function enables you to maintain organization manager relationships. A manager can only be initially assigned to an organization in the professional forms interface. However, you can view and update organization managers according to your security profile in SSHR.

For more information on organization manager relationships, see Selecting and Viewing Managers for Organizations, *Oracle HRMS Enterprise and Workforce Management Guide*.

If you terminate an employee who is also the manager of one or many organizations, one of the following will occur:

- The Update Organization Manager page displays for you to assign new managers to the organizations for which the terminated person was the manager.
- If you have organization hierarchy security set up and the employee or worker is the manager of multiple organizations, the Update Organization Manager page displays only the records to which you have access and can update.
- If you do not have access to any records, the Update Organization Manager page does not appear.

If you have supervisor security enabled, the Organization Manager Actions Section on the Overview page will automatically display with any records that have been end dated and require you to assign a new manager.

> **Note:** There can only be one organization manager relationship at any single point in time.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Organization Manager

Workflow

Details of Workflow for this module are listed below:

Workflow Process Display Name:

Organization Manager

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Organization Manager	Organization Manager Overview	Restrict Organization Classification

Description of Attributes

You can restrict the Organization Manager module to one organization classification by entering an organization classification code into the attribute. 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.

Configurable Tips and Instructions

Manager Overview Top Page

Region	Tip Type	Message Name
Organization Manager Actions Section	Instruction	HR_CCMGR_ACTIONS_SS
Organization Manager Overview Form	Instruction	HR_CCMGR_OVERVIEW_INSTR_SS
Organization Manager Search Section	Long Message	HR_CCMGR_DIRECT_REPORTS_TIP
Organization Manager Actions Section	Long Message	HR_PENDING_INSTR_SS

Manager Update Top Page

Region	Tip Type	Message Name
Organization Manager Update Form	Instruction	HR_CCMGR_UPD_PAGE_INSTR_SS

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Additional Configuration Steps

Not applicable

Views

Information Overview

This topic and related links provide configuration details for My Information, My Employee Information, and HR Views pages.

My Information and My Employee Information

My Information enables employees or contingent workers to view their employment and other related details. SSHR previously referred to this function as Employee Views. My Information includes past and present records, and you can also view future changes in the areas of training, absence, and job applications.

My Employee Information enables managers and HR professionals to review the same records available to users of My Information for anyone within their security access. SSHR previously referred to this function as Manager Views. In Details views, past, present, and future data is available.

You can view the details of people by the hierarchy, search results or from 'My List' functionality, giving you immediate access to records that connect people with their work context. You can use advanced search criteria to find people, and save your searches for later reuse. Lists of people display all assignments in addition to the primary, providing you with a complete picture of their duties. You can specify an effective date to review records as of a given point in time.

The application groups the information on six tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications

See: My Information and My Employee Information, page 8-64

HR Views

The HR Views module is aimed at HR Professionals. It offers a summarized view of employee-related information: Personal Information, Assignment Details, Compensation Activity, and Termination History.

Each area of information is displayed on separate pages or tabbed regions. From each page, the user can click a button and display different information.

See: Configuring Tabbed Regions, page 5-21

Navigate to HR Views functionality using the responsibility HR User Self Service and the function HR Views. All information is for viewing only. To modify information, users must log on with the Manager Self Service responsibility.

> **Note:** HR Views show information that is more appropriate for HR professional users hence it is delivered under the HR Professional

responsibility. Employee access using HR Views is controlled by the HRMS security access associated with the current user.

See: Employee Information View, page 8-72

See: Assignment Details View, page 8-73

See: Compensation Activity View, page 8-74

See: Termination History View, page 8-75

See: Search Functions for HR Views, page 8-77

My Information and My Employee Information

My Information enables employees and contingent workers to view their employment and other related details.

My Employee Information enables managers and HR professionals to view the employment and other related details of people within their security access. Managers and HR professionals can view the details of people from hierarchy, search results, or 'My List' views.

> **Note:** If you are using assignment-level security, you cannot access any terminated or expired assignments.
>
> For more information, see: Assignment-Level Security, *Oracle HRMS Configuring, Reporting, and System Administration Guide*.

The hierarchy display usually uses the supervisor hierarchy. However, if required, you can display a position-based hierarchy.

For more information, see: Enter Process, *Deploying SSHR Capability*.

Personalizations

Using personalizations, you enable only the functionality, information, and controls you want to make available to users. For example, you can display only the column headings of your choice in Summary and Details views. Consider the following personalizations specific to My Employee Information:

- Enable Manager Actions Icon
- Enable Effective Date
- Enable My List
- Enable Search Filter
- Name Format

Enable Manager Actions Icon

You can navigate to Manager Actions and initiate a self-service action for employees listed on My Employee Information, My List, or Advanced Search pages. To do this, enable the Action icon. Your Employee Type (EMP or CWK) determines whether you navigate to the Manager Actions or the Contingent Worker Manager Actions function. You can enable the Action icon on the following pages:

- My Employee Information
- My List
- Simple Search
- Advanced Search

See: The Personalization Framework, page 5- 3

See: Configuring Web Pages, page 5-15

See: *OA Framework Personalization and Extensibility Guide*, available on Metalink.

My Employee Information

The main page for My Employee Information displays information in six categories, grouped on the following sub tabs:

- Employment
- Salary
- Performance
- Training
- Absence
- Job Applications

> **Note:** The Training tab is off by default. To show the Training tab, see the section Menu and Function Names, page 8-68, below.

Enable the Action icon for each tab by clicking the Personalize Page link. Apply the default scope of Page: 'Oracle Self Service Human Resources: My Employee Information'.

Using the Employment tab as an example, navigate the following nodes:

- Default Single Column: Manager Views
- Sub Tab Layout: (subTabRN)
- Stack Layout: Employment
- Query: Employment.EmpQueryRN

For each tab, navigate the child nodes beneath Query to enable the Action icon when you view selected people from search results or My List:

- Table: Employment
- Image: Action

For each tab, the sibling nodes beside Query (beneath Stack Layout) enable the Action icon for position hierarchies and supervisor hierarchies. Navigate the following nodes beneath Stack Layout:

- H Grid: [Supervisory Hierarchy | Position Hierarchy]
- Image: Action

To enable the Action icon at the function, location, site, organization, or responsibility level, click the Personalize icon and set the value of the Rendered field corresponding to the level.

Repeat the above steps in a similar way for the remaining tabs.

> **Note:** When you personalize at the page level by selecting a scope using the Page: prefix, as shown here, your personalizations are unique to that page. Shared regions can appear on multiple pages. When you select a scope using the Shared Region: prefix (such as Quick Search), your changes propagate to all instances of the region on all pages that use it.

My List

To personalize the My List page, click the Manage My List link to display the My List page. Set the scope on the Choose Personalization Context page to Shared Region: My List. Navigate the following nodes:

- Stack Layout: MyList
- Table: People in My List
- Image: Action

For information on how to enable the Manage My List link, see Enable My List, page 8-67, below.

Simple Search

To personalize the Simple Search page, enter text in the Quick Search field and press Go to display the page. Click the Personalize Basic Search link, and accept the default scope of Region: Basic Search. Navigate the following nodes:

- Default Single Column: Basic Search
- Table: People
- Image: Action

Advanced Search

To personalize the Advance Search page, click the Advanced Search link to display the page. Click the Personalize Advanced search link, and accept the default scope of Region: Advanced Search. Navigate the following nodes:

- Default Single Column: Advanced Search
- Query: Advanced Search
- Table: People
- Image: Action

Enable Effective Date

Enable the Effective Date field to display snapshot views at a point in time in Hierarchy or My List views.

To do this, click the Personalize Effective Date and View As link, and accept the default scope of Region: Effective Date and View As. To enable the Effective Date field and the Go button, navigate the following nodes:

- Flow Layout: Effective Date and View As
- Row Layout: Effective Date
- Message Text Input: Effective Date

- Submit Button: Go

Enable My List

Enable My List features by adding the My List entry to the context switcher. See Lookups, page 8-68, below.

The Manage My List page enables you to view or delete My List members. Enable the Manage My List link on the My Employee Information or Basic Search page using the Personalize Page link. Navigate the following nodes:

- Page: [My Employee Information | Basic Search]
- Scope: 'Shared Region: Quick Search'
- Row Layout: Quick Search
- Link: Manage My List

The Add To My List button enables you to add selected people to My List. Enable the Add to My List button on the Basic Search and Advanced Search pages using the Personalize Page link. Navigate the following nodes from the Basic Search page:

- Scope: Shared Region: Basic Search
- Default Single Column: Basic Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Navigate the following nodes from the Advanced Search page:

- Scope: 'Shared Region: Advanced Search'
- Default Single Column: Basic Search
- Query: Advanced Search
- Table: People
- Table Selection
- Multiple Selection
- Selection Button: Add To My List

Enable Search Filter

To filter name searches, enable the search filter list for First Name, Last Name, or Full Name on the My Employee Information page, the Basic Search Page, or the My List page. If you do not enable the list, users see only the Name label and the Search field, and the default filter is Last Name. Navigate the following nodes:

- Page: [My Employee Information | Basic Search | My List]
- Scope: Shared Region: Quick Search
- Row Layout: Quick Search
- Message Choice: (SearchFilter)

Name Format

The My Information and My Employee Information pages display names in brief format by default. If you prefer to see the full name of the employee or worker, set the profile option HR:Display Person Name to Full Name.

Overrides

In the My Information and My Employee Information pages, the position and job names are displayed using a concatenated flexfield format. If required, you can use customer overrides to configure a user-defined format for displaying position and job names. For example, you can display a name using fewer segments.

For more information on overrides, see: Legislation and Customer Overrides, page 2- 4 .

Menu and Function Names

Navigation is available from the Employee or Manager Self Service menu, or new menus you configure. In addition to including the My Employee Information function in new menus, add the following predefined submenus as-is:

- HR_EMP_VIEWS_FUNC_MENU (My Information Functions)
- HR_MGR_VIEWS_FUNC_MENU (My Employee Information Functions)

Submenus provide Oracle Applications Framework page authentication only, you need not copy or recreate them.

> **Note:** HR professionals can enter My Employee Information using Advanced Search. Add the Advanced Search function to the HR Professional menu.

Menu Name	User Menu Name	Function Name
HR_EMPLOYEE_DIRECT_ ACCESS_V4.0	Employee Self Service	My Information
HR_LINE_MANAGER_ ACCESS_V4.0	Manager Self Service	My Employee Information

> **Note:** You cannot change tab sequence, but you can use standard AOL menu exclusion functionality at the responsibility level to show and hide tabs. Make your changes to the My Information Views Sub Tab Menu (HR_EMP_VIEWS_SUB_TABS) or the My Employee Information Views Sub Tab Menu (HR_MGR_VIEWS_SUB_TABS). See: Configuring Tabbed Regions, page 5-21, *To remove a tabbed region or button from display*.

See: Defining Menus for SSHR, page 2- 6

Lookups

To enable My List functionality, enable My List in the following lookup.

Lookup	Display Name
HR_MGRV_APPL_CONTEXT	Information Views Application Context Switcher

Note: You must also enable the navigation button Manage My List to the My Employee Information page, and the navigation button Add to My List to Simple and Advanced Search Results pages.

Workflow

Not applicable

Configurable Tips and Instructions

The following tables describe configurable tips and instructions.

My Information

Region Name	Tip Type	Message Name
Employee Views	Instruction	HR_EMPV_PAGE_INSTR
Employee History Table	Instruction	HR_EMPV_EMP_TABINSTR
Salary History Table	Instruction	HR_EMPV_SAL_TABINSTR
Performance History Table	Instruction	HR_EMPV_PERF_TABINSTR
Training History Table	Instruction	HR_EMPV_TRNG_TAB INSTR
Absence History Table	Instruction	HR_EMPV_ABS_TABINSTR
Application History Table	Instruction	HR_EMPV_APPLN_TAB INSTR

My Employee Information

Region Name	Tip Type	Message Name
Manager Views	Instruction	HR_MGRV_PAGE_INSTR
Training History Table	Instruction	HR_MGRV_TRNG_TABINST

Configurable Flexfields

The following tables describe available configurable flexfields.

My Information

Region Name	Flexfield Name	Message Name
Employee History Table	Additional Assignment Details	PER_ASSIGNMENTS
Employee History Table	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
Employee History Table	Add'l Period of Placement Det's	PER_PERIODS_OF_ PLACEMENT
Employee History Table	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Performance History Table	Review Addl Information	PER_PERFORMANCE_REV IEWS
Performance History Table	Additional Appraisal Details	PER_APPRAISALS
Absence History Table	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Application History Table	Additional Application Details	PER_APPLICATIONS
Employee Views	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Employee Views	Proposal Component Addl Info	PER_PAY_PROPOSAL_COM PONENTS

My Employee Information

Region Name	Flexfield Name	Message Name
Employment Details	Additional Assignment Details	PER_ASSIGNMENTS
Employment Details	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
Employment Details	Add'l Period of Placement Det's	PER_PERIODS_OF_ PLACEMENT
Employee History Table	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Employee History Table	Add'l Period of Service Det's	PER_PERFORMANCE_REV IEWS
Employee History Table	Add'l Period of Placement Det's	PER_APPRAISALS
Salary Details	Add'l Salary Admin. Details	PER_PAY_PROPOSALS
Performance History Table	Review Addl Information	PER_ABSENCE_ ATTENDANCES
Performance History Table	Additional Appraisal Details	PER_APPLICATIONS
Training History Table	Additional Delegate Booking Information	OTA_DELEGATE_BOOK INGS
Training History Table	Add'l Non OTA Training History Info.	OTA_NOTRING_HISTORIES
Employee History Table	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Application History Table	Additional Application Details	PER_APPLICATIONS
Application History Table	Additional Assignment Details	PER_ASSIGNMENTS

Configurable Profile Options

You can display a position hierarchy instead of a supervisory hierarchy in My Employee Information.

Profile Options

Profile	Configurable Levels	Values	Default
HR: Display Position Hierarchy	Site	Yes/No	No
HR: Enable User Personalization	All	Yes/No	No

Employee Information View

The Employee Information view displays the details relevant to an employee or worker. This information need not relate to their job or employment contract.

The Employee Information page displays any specific fields which you have defined as flexfields and can also display a country-specific section which will display localization fields, for example, the national identifier or visa information.

All the information in the Employee Information view relates to the current record for the employee or worker and no history is displayed.

Menu and Function Names

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

User Menu Name	Function Name
HR Views	HR Views

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
EPI Address Detail Region	Personal Address Information	Address Structure
EPI Additional Person Details	Additional Personal Details	PER_PEOPLE
EPI Further Person Information	Further Person Information	Person Developer DF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Assignment Details View

The assignment of an employee or worker identifies their role and payroll within a business group. The assignment is made up of a number of assignment components, for example, the organization and payroll.

The Assignment Details view displays this assignment information for a particular employee or worker, and also enables you to display additional related information, for example, the hire date or assignment number If multiple assignments are enabled, the HR Professional can select which assignment information to display. If multiple assignments are not enabled, the primary assignment information is displayed.

See: Multiple Assignments, page 8-38

Menu and Function Names

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

User Menu Name	Function Name
HR Views	View Employee Assignment Details

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
AD Current Assignment Region	Job Flexfield	JOB
AD Current Assignment Region	Position Flexfield	POS
AD Current Assignment Region	Grade Flexfield	GRD
AD Additional Assignment Details Desc Flex Region	Additional Assignment Details	PER_ASSIGNMENTS
AD Assignment History Detail Region	Job Flexfield	JOB
AD Assignment History Detail Region	Position Flexfield	POS
AD Assignment History Detail Region	Grade Flexfield	GRD
AD Assignment Statutory Info	Soft Coded Key Flex	SCL

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Compensation Activity View

The Compensation activity view displays the salary and benefits information for an employee. If multiple assignments are enabled, the HR Professional can select the required assignment.

See: Multiple Assignments, page 8-38

> **Note:** The self-service My Employee Information function also contains a Salary view, although this tab does not contain information about the employee's benefits.

The Compensation Activity view displays all the elements for a worker unless they are linked to benefit plans and, therefore, have rates defined. If this is the case, only the rates are displayed.

Menu and Function Names

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

User Menu Name	Function Name
HR Views	View Employee Compensation Activity

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
CA Work Detail Region	Job Flexfield	JOB
CA Work Detail Region	Position Flexfield	POS
CA Work Detail Region	Grade Flexfield	GRD
CA Additional Salary Details Desc Flex Region	Add'l Salary Admin Details	PER_PAY_PROPOSALS

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Termination History View

You terminate an employee or worker when he or she leaves your organization. Information about the employee or worker remains on the system but all current assignments are ended.

The Termination History view displays any termination history for an employee or worker. If a worker's contract is terminated and the worker is subsequently rehired, the application updates the information displayed in the view so that the worker is not displayed as *Terminated*.

The worker's record may contain more that one termination, for example, if they have been rehired more than once.

> **Note:** If the worker has been rehired, the SSHR application displays the last termination date.

Menu and Function Names

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

User Menu Name	Function Name
HR Views	View Employee Termination History

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Region	Flex Name	Flex Code
TH Work Detail Region	Job Flexfield	JOB
TH Work Detail Region	Position Flexfield	POS
TH Work Detail Region	Grade Flexfield	GRD
TH Additional Periods of Service Desc Flex Region	Add'l Period of Service Det's	PER_PERIODS_OF_SERVICE
TH Additional Periods of Service Information Desc Flex Region	Add'l Periods of Service Information	PER_PDS_DEVELOPER_DF

See: Configuring Flex Segments, page 5-20

Configurable Profile Options

Not applicable

Search Functions for HR Views

The first Search function for HR Views is displayed when an HR Professional selects the HR Views option from the self-service menu (when using the HR User Self Service responsibility). At this point, the user can only search for a worker.

The second Search function for HR Views is displayed when the HR Professional has searched for a worker. At this point, the user can either view data for the selected worker or search for another worker.

Menu and Function Names

These modules can be accessed from the following menus and functions:

User Menu Name	Function Name
HR User Self Service (HR_USER_SELF_SERVICE_V4.0)	HR Views Person Search Initial Screen
HR Views Menu (HR_VIEWS_MENU)	HR Views Person Search

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Recruitment

Hire or Placement, Place Contingent Worker Processes

SSHR's workflow processes Hire or Placement and Place Contingent Worker enable you to enter information about new employees or contingent workers, and also hire people for whom you already have applicant assignments with a status of Accepted.

These processes provide you with the ability to hire employees or bring contingent workers into your enterprise, but if you want to configure them to fit your particular business needs, you can chain any of the following modules into the process:

- Personal Information (including basic details, address, and phone numbers)
- Assignment
- Employee or Contingent Worker Pay
- Change Manager
- SIT
- EIT
- Other Employment Information
- Work Schedule (not applicable to Place Contingent Worker)

When creating a chained process, the Hire Details, Applicant Search, or Place Contingent Worker page must be the first page, followed by the Personal Information page. Then you can add the Person EIT, Assignment EIT, or the Assignment pages. Following this, any of the remaining pages can be included.

The following table gives a list of the delivered chained processes and what modules are included in them.

Recruitment Chained Processes:

Chained Process	Contains the following modules:
Hire or Placement	Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager
Contingent Worker Placement	Personal Information, Assignment, Employee or Contingent Worker Pay, Change Manager
French Hire	Personal Information, Assignment, Other Employment Information, Work Schedule, Assignment EIT, Employee or Contingent Worker Pay

> **Note:** These processes are delivered with function level personalizations. If you make a copy either of them in order to make your own changes you will lose these delivered personalizations.
>
> See: Function-level Personalizations, page 5- 6

Applicant Search

When hiring an applicant, the results displayed in the Search Applicant page are restricted according to your security profile. In addition, any applicant who is also a current or future employee in your enterprise is also excluded from the SSHR Search Applicant page.

Duplicate Person Checking

When entering a new person, if you have the HR: Cross Business Group profile option set to Yes, then the application does a check to see if the person you are entering already has an existing record.

For more information see: People in a Global Enterprise, *Oracle HRMS Enterprise and Workforce Management Guide*

If an existing record is found, then a list of the possible matches is displayed in the Potential Duplicate People page. You can do one of the following:

- If a potential duplicate exists in outside of the current business group you can create a link between the two records by selecting it. This indicates that they are the same person.
- If the potential duplicate exists in the same business group, then when you click on the existing record an error is displayed as you cannot have two record for the same person in one business group.
- If this is a new person select No Match to indicate that the new record is not connected to any other records and continue entering information.

Menu and Function Names

These processes can be accessed from the following menus and functions:

User Menu Name	Function Name
Manager Self Service	Hire
Manager Self Service	Applicant Hire
Manager Self Service	Contingent Worker Placement
Manager Self Service	French Hire
Manager Self Service	French Applicant Hire

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Hire or Placement

French Hire

Configurable Workflow Attributes:

Refer to the individual topics on each of the modules included in your process for information on what configurable workflow attributes are available.

Configurable Tips and Instructions

Search Hire Applicant Page

Region	Tip Type	Message Name
Applicant List	Long Message	HR_GENERIC_PENDING_INST_SS
Applicant Entry	Instruction	HR_INST_SEARCH_HIRE_APPLICANT
Applicant Entry	Instruction	HR_INST_SEARCH_APPLICANT
Applicant Entry	Instruction	HR_INST_APPLICANT_HIRE

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Region	Flex Name	Flex Code
Basic Detail Update Name Entry	hrpersondevdfflex	Person Developer DF
Basic Detail Update Other Entry	hrpersondevdfflex	Person Developer DF
Basic Detail Update Other Entry	Add Per Details Flexfield	PER_PEOPLE
NewHire Main Address	hraddressflex	Address Structure
NewHire Main Address	hraddtladdressflex	PER_ADDRESSES

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR: Cross Business Group	Site, Responsibility	Yes/No	No
HR: Propagate Data Changes	Site	Yes/No	No
HR: Self Service Hire and Placement Default	Site, Application, Responsibility, User	Yes/No	Yes
HR: Base Salary Required	Site	Yes/No	Null

HR:Cross Business Group

Specifies whether people from business groups other than your own can be retrieved in the Search Applicant page.

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.

For more information see: Person Record Synchronization, *Oracle HRMS Enterprise and Workforce Management Guide*

HR: Self Service Hire and Placement Default

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

For the Hire or Placement function, if you set the profile to Yes, the application defaults the Organization value based on the primary assignment, as of the system date, of the person logged in. The application also defaults the following values, but they do not apply to contingent worker placement:

- GRE (if US)
- Payroll
- Salary Basis

The supervisor for the new person defaults to the person logged in.

For both 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.

HR: Base Salary Required

See: Pay Rate, page 8-54.

For more information see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Further Configuration Steps

Warning: Hire or Placement functionality uses code 'NEWH' under lookup_type 'PROPOSAL_REASON' to render the PayRate page. *Do not configure this code*, either by disabling the code or by disabling the localization the Hire or Placement process is running. If you do so, the Hire functionality will break.

9

Talent Management

Talent Management Overview

SSHR provides self-service functions within the following areas of Talent Management:

- Competence Management and Development
- Training

This chapter looks in detail at the self-service functions available within this area and provides information on the functionality and configuration options for each function:

Using SSHR for Talent Management

Which Talent Management functions can I access from SSHR?

SSHR includes functions from both Competence Management and Development and Training. Within Competence Management and Development, you can access the Events and Bookings and Employee Review functions. Within the Training functions, you can access internal and external training and also use the External Linking function to generate hypertext links to training.

Can users enroll themselves on training courses?

Yes. Users can either enroll themselves or their managers can enroll their direct reports. The training functions generally operate with self-approval, in other words, no managerial approval is required for the transaction.

Can I set up an approval process for the training functions if required?

Yes. If an approval process is required, you can configure the associated workflow processes so that the Dynamic Approvals functionality is used.

Are employee reviews the same as appraisals?

No. The Employee Review function enables users to set up a review and invite reviewers to the review. The Appraisals functionality enables users to set up reviews and also to attach questionnaires and other documents to the review.

Event and Attendance Administration

Events and Bookings

The Events and Bookings function enables self-service users to create their own events such as meetings, presentations, or training days or to book themselves on existing events. The Events and Bookings function is available to both managers and workers, enabling managers to book their subordinates onto events. If a manager books a subordinate onto an event, the subordinate worker receives notification of the booking.

See also: Event and Attendance Administration, *Using Oracle Learning Management*

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Events and Bookings
Manager Self Service	Events and Bookings

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Events Search Criteria	Instruction	PQH_EVENT_SEARCH
Events Create Button	Instruction	PQH_EVENT_ ADDORCANCEL
Events Search And Result Header	Instruction	PQH_EVENT_BOOK
Manager Events Search And Result Header	Instruction	PQH_EVENT_MGR_ SEARCH
Events Create Button	Instruction	PQH_EVENT_ ADDORCANCEL

See: Adding Instructions to Web Pages, page 5-22

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Employee Reviews

The Employee Review function enables employees and managers to create or update reviews. Employees can create their own reviews and managers can create reviews for their employees. Both managers and employees can invite reviewers to attend the review. They can also remove these reviewers if necessary. When reviewers are invited to a review or removed from a review, they receive a notification.

See: Event and Attendance Administration, *Oracle HRMS Enterprise and Workforce Management*

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Employee Review
Manager Self Service	Employee Review

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Employee Review

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable Flexfields

Not applicable

Configurable Profile Options

Not applicable

Evaluations and Appraisals

Appraisals (Self-Service)

The Appraisals module, accessed through the Employee and Manager responsibilities, manages the structure, content, and distribution of the worker appraisal process. Before creating any appraisals, users must open the professional user (forms) interface to set up at least one Assessment template and at least one Appraisal template.

Appraisals can send overall ratings directly to other self-service modules such as Compensation Workbench. To ensure a workable transfer, implementers must map the numeric step values in the Overall Rating table in the Appraisal Template to those in the Performance Rating lookup (1=1, 2=2, etc.).

Displaying and Hiding Appraisals Regions

In its default configuration, Appraisals displays the Competencies and Questionnaire regions, while hiding the Training Courses regions. Administrative end users can use the Appraisal Template window to display or hide the Competencies and Questionnaire regions on a case-by-case basis, but displaying the Training Courses region requires personalizations best performed by the implementor. Organizations that run Oracle Learning Management (formerly Oracle Training Administration) will probably wish to display the Learning Courses region, while those that do not should not attempt to do so.

To hide the Competencies region, omit the Assessment Template from the Appraisal Template.

To hide the Questionnaire region, omit the Questionnaire from the Appraisal Template.

To display the Learning Courses region, you must follow three steps:

1. Personalize two pages, enabling both to display the item "TraActivitiesRN":
   Overview page: mds/selfservice/appraisals/webui/OverviewPG.xml
   Main Appraiser Final Ratings page: mds/selfservice/appraisals/webui/MAFinalRatingsPG.xml
2. Using the page layout tree in the personalization page for the pages listed in Step 1, personalize the region "TraActivitiesRN", enabling the item "Training Courses" and removing the item "View Competency Gaps".
3. Personalize the following pages to show the Training Courses review region:
   - View Appraisal page for Appraisee - mds/selfservice/appraisals/webui/ApprDetailsROPG.xml
   - Final Appraisal page (viewed by Appraisee after the Appraisal is completed) - mds/selfservice/appraisals/webui FinalApprDetailsPG.xml
   - Final Appraisal page (viewed by Main Appraiser and Final Approvers after the Appraisal is completed) - mds/selfservice/appraisals/webuiFinalAppraisal PG.xml
   - View Details page for Main Appraiser - mds/selfservice/appraisals/webui MAApprReviewPG.xml
   - Main Appraiser Final Ratings Review page - mds/selfservice/appraisals/webui MAFinalRatingsRevPG.xml
   - Appraiser (Participant) View Details page - mds/selfservice/appraisals/webui PartAppraiserROPG.xml

- Reviewer (Participant) View Details page - mds/selfservice/appraisals/webui PartReviewerROPG.xml
- Appraiser (Participant) Update page - mds/selfservice/appraisals/webui PartUpdAprPG.xml
- Reviewer (Participant) Update page - mds/selfservice/appraisals/webui PartUpdRevPG.xml
- Review page in (Create/Update flow) - mds/selfservice/appraisals/webui ReviewPG.xml
- Main Appraiser Review page - mds/selfservice/appraisals/webui MAReviewPG.xml

Menu and Function Names

The following table describes the menu and function names.

Menu and Function Names

User Menu Name	Function Name
Employee Self-Service	Employee Appraisals (HR_EMP_APPRAISALS_PAGE_SS)
Manager Self-Service	Manager Appraisals (HR_MANAGER_APPRAISALS_SS)
Contingent Worker Self-Service	Employee Appraisals (HR_EMP_APPRAISALS_PAGE_SS)
HR Professional	View Appraisals Manager - HR Sys Admin (HR_VIEW_SYSAPPR_MGR_SS)

Workflow

Workflow Process Display Name: Appraisal Details Process

Workflow triggers multiple events, usually notifications to participants. Completion of a Standard or 360-Degree appraisal automatically updates the appraisee's competency profile (unless the system profile is disabled), creates or updates the appraisee's personal training plan, and creates a Performance Review event, which in turn can transfer the overall rating and other data to other modules such as Compensation Workbench.

If you define or configure new functions, you can choose to enable or disable approvals by adding one of the following values to the parameter "pApprovalReqd":

- Y [approvals required]
- YD [approvals with Dynamic Approval support]
- N [no approvals required]

YD is the default value. You cannot enable approvals for Self Appraisals.

The table below lists all the workflow notifications unique to Appraisals.

Workflow Notifications

Message Source	Message Name	Subject	Body
SYSADMIN	HR_APPRAISAL_ COMMAPPLERR_ MSG	An application error has occurred in your process & PROCESS_DISPLAY_ NAME performed on &CURRENT_ PERSON_DISPLAY_ NAME	Your &PROCESS_ DISPLAY_NAME performed on &CURRENT_ PERSON_DIS PLAY_NAME has encountered the following application error: &ERROR_ MESSAGE_TEXT Please click the link below to view the changes. The HR Rep/System Administrator has been notified. For further action on this failed transaction, please contact your HR Rep/System Administrator &AP PROVAL_HISTORY
SYSADMIN	HR_APPRAISAL_ COMMIT_APPERR_ MSG	An application error has occurred in your & PROCESS_DISPLAY_ NAME process.	Your process & PROCESS_DIS PLAY_NAME has encountered the following application error: &ERROR_ MESSAGE_TEXT This process has been cancelled without any changes being made. After correcting the issue, click on 'Retry' to complete the transaction.
Main Appraiser User Name	HR_APPRAISAL_ OTHER_PARTIC_ MSG	The appraisal of & REVIEWEE needs your participation	&FORWARDER has requested that you participate in the appraisal (dated &A PPRAISAL_DATE) of &REVIEWEE Comments: &WF_ NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRAISAL_ REVIEWER_MSG	The appraisal of & REVIEWEE needs your review	&FORWARDER has requested that you review the appriaisal (dated &APPRA ISAL_DATE) of &REV IEWEE Comments: &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
Main Appraiser User Name	HR_APPRAISER_ MSG	The appraisal of & REVIEWEE needs your input	&FORWARDER has requested that you act as appraiser for the appraisal (dated &A PPRAISAL_DATE) of &REVIEWEE Comments: &WF_ NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_APPRAISAL_ COM_APPRAISEE_ MSG	Your appraisal has been completed	&FORWARDER has completed your appraisal. Please click &OBJECT_URL to view the appraisal details.
Main Appraiser User Name	HR_TRANSFER_TO_ APPRAISEE_MSG	Your appraisal has been transferred to you	&FORWARDER has requested that you modify the details of your appraisal dated &APPRAISAL_DATE Comments : &WF_ NOTE Please click &OBJECT_URL to view the appraisal details.
SYSADMIN	HR_NTFY_MA_COM PLETE_MSG	&PROCESS_D ISPLAY_NAME for &CURRENT_ PERSON_DISPLAY_ NAME has been approved	Final Approver: & FORWARD_TO_DIS PLAY_NAME User Name: &FORWARD_ TO_USERNAME Comment: & APPROVAL_ COMMENT & PROCESS_DISPLAY_ NAME changes for &CURRENT_ PERSON_DISPLAY_ NAME have been approved and completed. Listed below is the appraisal commit log &HR_AP PRAISAL_COMMIT_ LOG This notification requires no action.
Main Appraiser User Name	HR_MAIN_APPRA ISER_MSG	The appraisal of & REVIEWEE needs your attention as main appraiser	The appraisal (dated &APPRAISAL_ DATE) of &REV IEWEE requires your attention as the main appraiser. Comments : &WF_NOTE Please click &OBJECT_URL to view the details.

Message Source	Message Name	Subject	Body
Main Appraiser User Name	HR_PART_TO_MAIN_APPRAISER_MSG	&FORWARDER has completed their appraisal of &REVIEWEE	&FORWARDER has completed their appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.
Main Appraiser User Name	HR_NEW_MAIN_APPRAISER_MSG	You have been selected as main appraiser in the appraisal of &REVIEWEE	&FORWARDER has requested that you take over for &MAIN_APPRAISER as the main appraiser in the appraisal (dated &APPRAISAL_DATE) of &REVIEWEE Comments : &WF_NOTE Please click &OBJECT_URL to view the details.

Tips, Instructions, and Messages

Appraisals includes an array of configurable tips, instructions, messages, and page titles as described in the following tables.

Tips and Instructions

Page	Region	Attribute Name	Message Name
AddTrnActPG	-	PageInst	HR_INST_APPR_ADD_TRACT_SS
CompElementDetailsPG	-	CompInst	HR_INST_APPR_NEW_COMP_SS
MAFinalRatingsPG	CompFinalRatingsRN	CompFinalInst	HR_INST_APPR_FINAL_COMP_RAT_SS
MAFinalRatingsPG	CompFinalRatingsRN	OverallAssmtInst	HR_INST_APPR_OVERALL_COMP_SS
OverviewPG	CompetenciesRN	InstFromMsg	HR_INST_APPR_ASSMT_TYPE_SS
MAFinalRatingsPG	EmpAccessOptionsRN	EmpAccessInst	HR_INST_APPR_EMPACCESS_SS
EmpAppraisalsPG	-	EmpApprInst	HR_INST_APPR_EMPAPPR_SS

Page	Region	Attribute Name	Message Name
EmpAppraisalsPG	-	MyAprEmp Instruction	HR_INST_APPR_EMP_RGN_SS
MAAddTrnActPG	-	PageInst	HR_INST_APPR_ADD_TRACT_SS
MAAddTrnCompGapsPG	-	PageInst	HR_INST_COMPGAPS_TRACT_SS
MAAppraisePG	-	AppraiseInst	HR_INST_APPR_MAAPPRAISE_SS
MACompElementDetailsPG	-	CompInst	HR_INST_APPR_NEW_COMP_SS
MAFinalRatingsPG	-	FinalRatingsInst	HR_INST_APPR_MAFINALRAT_SS
MAReviewPG	-	RevPageInst	HR_INST_APPR_MAREVIEW_PAGE_SS
MASetupDetailsPG	-	SetupDetailsInst	HR_INST_APPR_MASETUP_DET_SS
MAUpdTrnActPG	-	CompInst	HR_INST_APPR_UPD_TRACT_SS
MgrAppraisalsPG	-	MgrAprInst	HR_INST_APPR_MGR_RGN_SS
ObjDetailsPG	-	ObjInst1	HR_INST_APPR_OBJ_SS
ObjRatingDetPG	-	ObjInst1	HR_INST_APPR_OBJ_SS
MAFinalRatingsPG	OverallPerfRN	OverallPerfInst	HR_INST_APPR_OVERALL_COMM_SS
PartMADetailsPG	-	PartInstr	HR_INST_APPR_PART_CREATE_SS
PartNotifyPG	-	PartNtfPGInstr	HR_INST_APPR_PART_NOTIFY_SS
PartUpdAprPG	-	ApprInst	HR_INST_APPR_PARTAPRUPD_SS
PartUpdRevPG	-	ReviewerInst	HR_INST_APPR_PARTREVUPD_SS
MgrAppraisalsPG	ParticipApprRN	PartAprEmpInst	HR_INST_APPR_PARTICIP_RGN_SS

Page	Region	Attribute Name	Message Name
ParticipantDetailsPG	-	AddParticipInstr	HR_INST_APPR_ PART_CREATE_SS
MAFinalRatingsPG	PotentialDetailsRN	PotentialDetInst	HR_INST_APPR_ POT_DETAILS_SS
ReviewPG	-	ReviewPageInst	HR_INST_APPR_ REVIEW_PAGE_SS
SetupDetailsPG	-	SetupDetailsInst	HR_INST_APPR_ SETUP_DETAILS_SS
UpdTrnActPG	-	CompInst	HR_INST_APPR_U PD_TRACT_SS
ViewAppraisalsPG	-	MgrAprInst	HR_INST_APPR_ MGR_RGN_SS
-	ApprObjectivesRN	ObjInst	HR_INST_APPR_ OBJ_SS
-	MAObjectivesRN	ObjInst	HR_INST_APPR_ OBJ_SS
-	ObjDetailsRN	ObjInst	HR_INST_APPR_ OBJ_DETAILS
-	ObjRatingDetRN	ObjInst	HR_OBJ_DETAILS_ INST
-	ObjRatingsRevRN	ObjRatingInst	HR_INST_APPR_ OBJ_FINALRAT_SS
-	ObjectivesRN	ObjInst	HR_INST_APPR_ OBJ_SS
PartUpdAprPG	PartCommentsRN	PartCmtInst	HR_INST_APPR_ PART_CMT_SS
MAReviewPG	PartMAReviewRN	PartRgnInst	HR_INST_APPR_ MAREV_PART_SS
ParticipantsPG	ParticipantsRN	PartInst	HR_INST_APPR_ PART_PAGE_SS

Confirmation Messages

Message Name	Message Meaning
HR_CONFIRM_APPR_TRANSFER_SS	Appraisal has been transferred to the Appraisee
HR_CONFIRM_APPR_COMP_SS	Appraisal is complete
HR_CONFIRM_APPR_SAVED_SS	Confirmation Message for Main Appraiser when s/he Submits on Review page in Create/Update flow and is redirected to the Main Appraiser Review page
HR_CONFIRM_APPR_SENTMA_SS	The Appraisal has been sent to Main Appraiser
HR_CONFIRM_APPR_LOCK_SS	Participation status for selected participants is Complete
HR_CONFIRM_APPR_APPROVAL_SS	Appraisal has been sent for Final Approval
HR_CONFIRM_APPR_DELETE_SS	Appraisal has been deleted successfully
HR_CONFIRM_APPR_CHANGE_MA_SS	Main Appraiser for this Appraisal has been changed successfully
HR_CONFIRM_APPR_SEND_NOTIF_SS	Notifications have been sent successfully
HR_CONFIRM_APPR_APRCOMP_SS	Appraiser changes have been saved successfully and a Notification has been sent to Main Appraiser.
HR_CONFIRM_APPR_REVCOMP_SS	Reviewer changes have been saved successfully and a Notification has been sent to Main Appraiser.
HR_CONFIRM_APPR_OPCOMP_SS	Other Participant changes have been saved successfully and a Notification has been sent to Main Appraiser.

Instructions in Dialog Pages

Instruction Name	Instruction Meaning
HR_INST_APPR_DELETE_PAGE_SS	Delete message in Dialog page
HR_INST_APPR_TRMACH_PAGE_SS	When the appraisal is transferred to appraisee and the appraisee's current manager is not the Main Appraiser
HR_INST_APPR_TRANSFER_PAGE_SS	Confirms that the manager wants to transfer the appraisal
HR_INST_APPR_PART_COMPLETE_SS	Occurs when an appraisal participant clicks Complete
HR_INST_APPR_CHANGE_MA_SS	Confirms that the Main Appraiser has to be changed to a new person

Page Titles

Page Title	Page Description
HR_INST_APPR_CREATE_OVIEW_SS	Overview page in Create flow
HR_INST_APPR_UPDATE_OVIEW_SS	Overview page in Update flow
HR_INST_APPR_CREATE_PART_SS	Participants page in Create flow
HR_INST_APPR_UPDATE_PART_SS	Participants page in Update flow
HR_INST_APPR_CREATE_REVIEW_SS	Review page in Create flow
HR_INST_APPR_UPDATE_REVIEW_SS	Review page in Update flow
HR_INST_APPR_CREATE_SETUP_SS	Setup Details page in Create flow
HR_INST_APPR_UPDATE_SETUP_SS	Setup Details page in Update flow
HR_INST_APPR_EMP_HEADER_SS	Region header for Employee Appraisals

Configurable Flexfields

Configurable Flexfields

Region	Attribute Name	Flexfield Name
SetupDetailsPG	ApprDF	Additional Appraisal Details
SetupDetReviewRN	ApprDF	Additional Appraisal Details
MASetupDetReviewRN	ApprDF	Additional Appraisal Details
ApprRatingDetailsRN	ObjDF	Additional Objectives Details

Region	Attribute Name	Flexfield Name
EmpRatingDetailsRN	EmpPerfDFF	Add'l Perf. Ratings Det's
MARatingDetailsRN	MAPerfDFF	Add'l Perf. Ratings Det's
ObjAddlDetailsRN	ObjDFF	Additional Objectives Details
ObjDetailsRN	ObjFlex	Additional Objectives Details
-	PerfRatingFlex	Add'l Perf. Ratings Det's
ObjDetailsRORN	ObjFlex	Additional Objectives Details
-	PerfRatingFlex	Add'l Perf. Ratings Det's
ObjRatingDetRN	ObjFlex	Additional Objectives Details
-	PerfRatingFlex	Add'l Perf. Ratings Det's
ObjRatingsRevRN	ObjDFF	Additional Objectives Details
ObjReviewRN	ObjDFF	Additional Objectives Details
-	PerfRatDFF	Add'l Perf. Ratings Det's
ApprCompAddlDetailsRN	ApprCompElementDF	Add'l Competence Element Det's
CompElementDetailsRN	CompFlex	Add'l Competence Element Det's
CompReviewRN	CompElementDFF	Add'l Competence Element Det's
EmpCompAdUpdDetailsRN	EmpCompElementDF	Add'l Competence Element Det's
EmpCompAddlDetailsRN	EmpCompElementDF	Add'l Competence Element Det's
MACompAdUpdDetailsRN	MACompElementDF	Add'l Competence Element Det's
MACompAddlDetailsRN	MACompElementDF	Add'l Competence Element Det's

Profile Options

Appraisals includes five profile options:

- *HR: Appraisee Can Add Participants* enables appraisees to add appraisers, reviewers, and other participants
- *HR: Worker Appraisals Menu* and *HR: Manager Appraisals Menu* enable you to change the types of appraisals a worker and a manager can create

- *Apply Assessment Competencies to Person*, if set to yes, automatically updates the appraisee's competency profile with data from a completed appraisal
- *Talent Management Source Type* enables you to select a default value from among the values you establish for the PROFICIENCY_SOURCE user lookup; the value appears in various places such as personal training plans

The following table describes the profile options.

Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: Appraisee Can Add Participants	All	**Yes**, No	No
HR: Worker Appraisals Menu	All	**Employee Appraisals Menu**	Yes
HR: Manager Appraisals Menu	All	**Manager Appraisals Menu**	Yes
Apply Assessment Competencies to Person	Site	Yes, **No**	No
Talent Management Source Type	Site	[PROFICIENCY_ SOURCE lookup value]	No

Questionnaire Administration (Self-Service)

The Questionnaire Administration module helps to automate the creation of questionnaires for use in appraisals or surveys.

Users can generate the HTML content with any external HTML editor.

Menu and Function Names

You can access the Questionnaire Administration module from the menus and functions in the table below.

Menu and Function Names

User Menu Name	Function Name
HR Professional	HR_QUEST_ADMIN_SS
Questionnaire Functions Menu	HR_QUEST_ADMIN_SS (Questionnaire Administration) HR_QUEST_DEFINE_SS (Create Questionnaire) HR_QUEST_PREVIEW_SS (Preview Questionnaire) HR_QUEST_VIEW_SS (Preview Questionnaire) HR_QUEST_UPD_PREVIEW_SS (Preview Questionnaire) HR_QUEST_UPDATE_SS (Update Questionnaire)

Workflow

Questionnaire Administration uses no configurable workflow processes.

Tips, Instructions, and Messages

You can configure all the following tips, instructions, and messages directly from the Questionnaire Administration pages, using the "Personalize..." links.

Tips and Instructions

Page	Region	Attribute Name	Message Name
QuestCreatePG	Create Questionnaire	Instruction	HR_QUEST_DEFINE_INSTR_SS
QuestCreatePG	Required Field Description	longMessage	HR_QUEST_HTML_FIELD_INSTR
QuestPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW_INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_ADMIN_INSTR_SS
QuestOverviewPG	Search	Instruction	HR_QUEST_SRCH_INSTR_SS
QuestOverviewPG	Results: Questionnaires	Instruction	HR_QUEST_RESULTS_INSTR_SS
QuestUpdatePG	Questionnaire Update Region	Instruction	HR_QUEST_UPDATE_INSTR_SS
QuestUpdatePG	Required Field Description	longMessage	HR_QUEST_HTML_FIELD_INSTR
QuestUpdPreviewPG	Required Field Description	Instruction	HR_QUEST_REVIEW_INSTR_SS

Confirmation Messages

Message Name	Message Meaning
HR_SAVE_FOR_LATER_NO_CHANGE	No changes have been made in the Update Questionnaire Page
HR_QUESTIONNAIRE_UPDATE_CONF	Questionnaire create/update/publish/unpublish Confirmation

Instructions in Dialog Pages

Instruction Name	Instruction Meaning
HR_QUESTIONNAIRE_DELETE_WARN	Warning displayed for Delete Questionnaire

Flexfields

Questionnaire Administration uses no configurable flexfields.

Profile Options

Questionnaire Administration uses no unique configurable profile options.

Suitability Matching (Self-Service)

The Suitability Matching module provides a range of competency-based methods for finding the right person for a work opportunity or finding the right work opportunity for a person. Managers and HR professionals can compare employees, applicants, and contingent workers by role, job, and position, and employees can find work opportunities that fit their competencies.

Depending on their responsibility, the default Suitability Matching gateway page offers users from four to ten matching options.

The following table describes the options for suitability matching.

Suitability Matching Options

Category	Option	Access by Responsibility
Find a Person for a Work Opportunity	Find Suitable People by Role	Manager, HR Professional
Find a Person for a Work Opportunity	Find Suitable People by Competency	Manager, HR Professional
Find a Person for a Work Opportunity	Compare People by Current Role	Manager, HR Professional
Find a Person for a Work Opportunity	Compare Named Successors for a Position	HR Professional
Find a Person for a Work Opportunity	Compare Applicants for a Vacancy	Manager, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Role	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Find Work Opportunities by Competency	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Pending Applications	Manager, Employee, HR Professional
Find a Work Opportunity for a Person	Compare Succession Options	HR Professional
Find a Work Opportunity for a Person	Compare Current Assignments	Manager, Employee, HR Professional

Menu and Function Names

Suitability Matching is accessible through three menus and corresponding functions as described in the following table.

Menu and Function Names

User Menu Name	Function Name
Manager Self-Service (LINE_MANAGER_ ACCESS_V4.0)	Suitability Matching Mgr (HR_SUITABILITY_ MATCH_MGR_SS)
Employee Self-Service (EMPLOYEE_DIRECT_ ACCESS_V4.0)	Suitability Matching (HR_SUITABILITY_ MATCH_SS)
Contingent Worker Self-Service (HR_CWK_D IRECT_ACCESS)	Suitability Matching (HR_SUITABILITY_ MATCH_SS)
HR Professional (HR_PROF_SELF_SERVICE_ V4.0)	Suitability Matching Hr (HR_SUITABILITY_ MATCH_HR_SS)

Workflow

Suitability Matching uses no configurable workflow processes.

Tips and Instructions

You can configure all the following tips and instructions directly from the Suitability Matching pages, using the "Personalize..." links.

The following table describes the tips and instructions.

Tips and Instructions

Region	Attribute Name	Message Name
AddCompetenciesPG	SelectCompInst	HR_INST_ADD_COMP_TO_ LIST
CompGapsPG	SMCompGapsInst	HR_INST_COMP_GAPS_SS
ComparePeopleListPG	PersonListInst	HR_INST_PERSON_LIST
CompareSuccessorsListPG	PersonListInst	HR_INST_PERSON_LIST
CurrentAssignmentsPG	CurrentAssnInst	HR_INST_ASSIGNMENT_L IST
GraphByCompetencePG	GraphCompInst	HR_INST_GRAPH_COMP
GraphByPersonPG	GraphPersonInst	HR_INST_GRAPH_PERSON
GraphByWorkOppPG	GraphWorkOppInst	HR_INST_GRAPH_WORKO PP
PersonCompetenciesPG	PersonCompInst	HR_INST_PERSON_ SELECT_COMP
PersonListPG	PersonListInst	HR_INST_PERSON_LIST
RefineSearchPG	RefineSearchInst	HR_INST_REFINE_SEARCH

Region	Attribute Name	Message Name
SMManagerOptionsPG	ManagerOppInst	HR_INST_SUITMATCH_ LMDA_OPTIONS
SMManagerOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPT IONS
SMManagerOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_O PTIONS
SMOptionsPG	HROptionsInst	HR_INST_SUITMATCH_ LMDA_OPTIONS
SMOptionsPG	WorkOppInst	HR_INST_WORK_OPP_OPT IONS
SMOptionsPG	PersonOppInst	HR_INST_PERSON_OPP_O PTIONS
SMPersonOptionsPG	PersonPageOppInst	HR_INST_SUITMATCH_ EDA_OPTIONS
SMTrainingActivitiesPG	SMTrainActInst	HR_INST_TRAIN_ACT_SS
SelectCompetenciesPG	SelectCompInst	HR_INST_SELECT_COMP
SelectMultiRolePG	SelectRoleInst	HR_INST_MULTI_SELECT_ ROLE
SelectRolePG	SelectRoleInst	HR_INST_SELECT_ROLE
SelectRolePG	CompareByRoleInst	HR_INST_COMPARE_PEO PLE_ROLE
SelectRolePG	SelectPositionInst	HR_INST_SELECT_POSIT ION
SelectRolePG	SelectVacancyInst	HR_INST_SELECT_ VACANCY
SuccessionOptionsPG	SuccOptionsInst	HR_INST_SUCCESSION_O PTIONS
SuitableWorkOppListPG	WorkOppListInst	HR_INST_SUITABLE_ WORKOPP_LIST
VacancyListPG	VacancyListInst	HR_INST_VACANCIES_LIST
WorkOppListPG	WorkOppListInst	HR_INST_WORKOPP_LIST
MultiJobLovPG	SearchInst	FND_LOV_GO
MultiOrganizationLovPG	SearchInst	FND_LOV_GO

Region	Attribute Name	Message Name
MultiPositionLovPG	SearchInst	FND_LOV_GO
MultiVacancyLovPG	SearchInst	FND_LOV_GO

Configurable Flexfields

Suitability Matching uses no configurable flexfields.

Profile Options

The three profile options control the matching options available to each category of user: employee, manager, and HR professional. Each of the values is a menu name. If you want to change the options available to a given user (if you want to hide the succession options from everyone, for example), you can clone a menu and replace the profile value with the name of your new menu. Note that these menus differ in kind and structure from the user menus listed above.

The following table describes the profile options.

Profile Options

Profile	Configurable Level	Values (default value in boldface)	Value Required?
HR: SM Manager Find Work Opp Menu (HR_SM_PERSONAL_ACTIONS_MENU)	Responsibility	**HR_SM_PERSONAL_FUNCTIONS** (at Responsibility:HR Professional)**HR_SM_PERSONAL_FUNCTIONS** (at Responsibility: Manager Self-Service)	Yes
HR: SM Manager Find Person Menu (HR_SM_MANAGER_ACTIONS_MENU)	Responsibility	**HR_SM_MANAGER_FUNCTIONS** (at responsibility:HR Professional)**HR_SM_MANAGER_FUNCTIONS** (at responsibility: Manager Self-Service)	Yes
HR: SM Employee Find Work Opp Menu (HR_SM_EMP_PERSONAL_ACTIONS_MENU)	Responsibility	**HR_SM_EMP_PERSONAL_FUNCTIONS** (at responsibility: Employee Self-Service)	Yes

Training

Training (Self-Service)

The Training module replaces the Enroll in a Class and Cancel Enrollment functions available in SSHR 3.4. You can now enroll in a training class and cancel enrollment using the same self-service interface.

> **Note:** To obtain the self-service External Training module, you must apply OTA Minipack G or later.

The default Training function uses self-approval. In other words, employees can enroll themselves in classes without requiring approval from their manager or supervisor. You can, however, enable approvals by configuring the Approval Required attribute for the Review Page and Additional Enrollment Details activities within the Enroll in Training workflow process.

See: Overview of Approvals, page 6- 1

To integrate self-service training with a full installation of Oracle Training Administration, see Implementation Steps, *Implementing Oracle Learning Management*

> **Note:** If you have already implemented OTA, you may have already set some of the configurable profile options listed below. You do not need to reset them for SSHR.

Menu and Function Names

You can access this module from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	Training
Manager Self-Service	Training

Workflow

The Training module uses a Workflow Process Display Name of Enroll in Training. No unique workflow attributes are used.

Configurable Tips and Instructions

Region	Tip Type	Message Name
Training Top	Instruction	OTA_SS_INST_SELECT_VIEW_TIP
Training Top	Instruction	OTA_SS_INST_ENR_DETAILS_TIP
OTA Advanced Search Top	Instruction	OTA_SS_SIMPLE_SEARCH_TIP
OTA Advanced Search Top	Instruction	OTA_SS_ADVANCED_SEARCH_TIP
OTA Advanced Search Top	Instruction	OTA_SS_SEARCH_RESULT_TIP
OTA Training Center Search Top	Instruction	OTA_SS_TRN_CENTER_SEARCH_TIP
OTA Training Center Search Top	Instruction	OTA_SS_SIMPLE_SEARCH_TIP
OTA Competence Search Top	Instruction	OTA_SS_COMP_SEARCH_TIP
OTA Competence Search Top	Instruction	OTA_SS_SIMPLE_SEARCH_TIP

Configurable Flexfields

Region	Flexfield Code	Flexfield Name
OTA Additional Enrollment Details Top	OTA_DELEGATE_BOOKINGS	Additional Delegate Booking Information
Top Course Details Page	OTA_ACTIVITY_VERSIONS	Additional Activity Version Information
Top Course Details Page	OTA_EVENTS	Additional Event Information
Top Course Details Page	Address Location	Location Address
Other Non OTA Training Details	OTA_NOTRNG_HISTORIES	Additional Non OTA Training History Information

Configurable Profile Options

If you have previously implemented Oracle Training Administration, you may have already set some of the profiles below. You do not need to reset them for Self-Service Training.

Profile	Configurable Level	Values (default value in boldface)	Value Required?
OTA: Activate Automatic Waitlist Enrollments	All	Yes, **No**	Yes, at Site level
OTA: Automatic Finance Header Approval	Responsibility, Site	Yes, **No**	Yes
OTA: Automatic Waitlist Enrollment Default Booking Status	All	Placed, <value based on Placed>, <**null**>	Yes
OTA: Automatic Waitlist Enrollments: Hours Prior To Event	All	<numeric> (**0**)	Yes, at Site level
OTA: Waitlist Sorting Criteria	All	**Booking Priority**, Date Placed	Yes, at Site level
OTA: SS Automatic Creation of Finance Headers and Lines	Site	Yes, **No**	Yes
OTA: SS Default Training Administrator	Responsibility	<Person name>, <**null**>	Yes
OTA: SS Automatic Transfer to GL	Responsibility, Site	Yes, **No**	Yes
OTA: SS Minimum Hours to Cancel for Free	Site	<numeric value>, **0**	Yes
OTA: SS Read-only Enrollment Message	User	<Message text>, <**null**>	No

For further definitions of the OTA profile options, see Profile Options, *Implementing Oracle Learning Management*.

For general information about profile options, see: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

External Training (Self-Service)

The External Training module replaces the Training History functions available in SSHR 3.4. You can now enter and update external training (courses not originating as events within OTA) using the self-service interface.

> **Note:** To obtain the self-service External Training module, you must apply OTA Minipack G or later.

The default External Training function uses self-approval. In other words, employees can record their attendance without requiring approval from their manager or supervisor. You can, however, enable approvals by configuring the Approval Required attribute for the Additional Training Entry and the Review Page activities within the External Training workflow process.

See: Overview of Approvals, *Implementing Oracle Self-Service Human Resources*

To integrate self-service external training with a full installation of Oracle Training Administration, see Implementation Steps, *Implementing Oracle Learning Management*

Menu and Function Names

You can access this module from the following menus and functions:

User Menu Name	Function Name
Employee Self-Service	External Training
Manager Self-Service	External Training

Workflow

The Training module uses a Workflow Process Display Name of External Training. No unique workflow attributes are used.

Configurable Tips and Instructions

Region Name	Tip Type	Message Name
Additional Training Overview Top	Instruction	OTA_13962_ADD_TRNG_OVIEW_TIP
Additional Training Yes No Top	Instruction	OTA_13961_ADD_TRNG_DEL_CNFR_SS
Additional Training Entry Top	Instruction	OTA_13963_ADD_TRNG_ENTRY_TIP
Additional Training Entry Top	Instruction	OTA_13964_ADD_TRNG_UPD_TIP

Configurable Flexfields

Region Name	Flexfield Code	Flexfield Name
Additional Training Entry Top	OTA_NOTRNG_HISTORIES	Additional Non OTA Training History Information

Configurable Profile Options

The External Training module includes no applicable profiles.

For definitions of the OTA profile options, see Profile Options, *Implementing Oracle Learning Management*.

External Linking (Self-Service Training)

The External Linking module for self-service Oracle Training Administration generates hyperlinks to courses and events that training administrators can copy and paste into emails and Web pages. Clicking these hyperlinks enables employees to view, search for, and enroll in training events.

To generate hyperlinks, training administrators access the Training Link Generation function from their Training Administrator Self Service menu. You first search for the course or event, then the application generates a hyperlink in two forms, one a simple text hyperlink that bears the URL (Web address) of the course or event, the other a block of HTML code that you can copy and paste into a Web page or HTML mail. To copy the standard hyperlink, you generally right-click on the link, choose Copy Shortcut or equivalent from the contextual pop-up menu, then paste into the email or Web page (the specific procedures vary among browsers and platforms). Note that you may have to take an extra step to generate a hyperlink from the URL, depending upon the target application.

In either form, these links give employees direct access to the self-service application. If the hyperlink refers to a course, they can search for events based on the course, then enroll in the selected event; if the hyperlink refers to an event, they can enroll directly in the event. The links enforce security by prompting employees for their self-service login before they can view and enroll in courses and events.

Note that employees with multiple responsibilities or security profiles accessing this functionality cannot use the hyperlinks to enroll in events. These employees must use their standard self-service login procedure to view or enroll in courses or events. Note also that employees cannot enroll in courses outside their business group.

Menu and Function Names

User Menu Name	Function Name
Training Administrator Self Service	Training Link Generation
Global Self Service Functions Seed	Training Link Access
Employee Self Service	Training Link Access

Training Link Access and Global Self Service Functions Seed are included on the Employee Self Service menu but are invisible to Employee Self Service users. The Training Administrator can access these functions for setup and error checking, but they work mainly in the background.

To change menu structures or function names, or to modify workflow processes, you may wish to create your own versions of the Training Link Access and Training Link Generation functions. To copy and modify the supplied functions, you must change the parameter and HTML call values below. You can retain the other values.

Training Link Access

Parameter and Value	Refers To
&pProcessName=OTA_EXT_LINK_JSP_PRC	Training Link Access Workflow process name
&pCalledFrom=OTA_EXTERNAL_LINKING_SS	Training Link Access function name
&pOATrngFunc=OTA_ENROLL_SS	Training function name
&pTrngProcessName=OTA_ENROLL_IN_TRAINING_JSP_PRC	Training Workflow process name

HTML Call and Value	Refers To
&OAFunc=OTA_EXTERNAL_LINKING_SS	Training Link Access function name

Training Link Generation

Parameter and Value	Refers To
pCalledFrom=OTA_EXTERNAL_LINKING_URL_SS	Training Link Generation function name
&pExternalLinkingFunc=OTA_EXTERNAL_LINKING_SS	Training Link Access function name

HTML Call and Value	Refers To
&OAFunc=OTA_EXTERNAL_LINKING_URL_SS	Training Link Generation function name

Workflow

Workflow Process Display Name: Training Link Access

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Training Link Access	Cost Center	HR_APPROVAL_REQ_FLAG
Training Link Access	Review Page	HR_APPROVAL_REQ_FLAG
Training Link Access	Review Page	HR_DYNAMIC_APPROVAL_LEVEL

Configurable Tips and Instructions

Region	Attribute Name	Message Name
OTA EL Adv Srch Criteria	Help Tip 2	OTA_13971_EL_EVT_SRCH_TIP
OTA EL Adv Srch Search Results	Help Tip 2	OTA_SS_SEARCH_RESULT_TIP
OTA EL Center Search Criteria	Help Tip	OTA_SS_SIMPLE_SEARCH_TIP
OTA EL Center Search Results	Help Tip 2	OTA_SS_TRN_CENTER_SEARCH_TIP
OTA EL Course Header	Help Tip	OTA_13975_EL_ACT_TIP
OTA EL Course Header	Help Tip	OTA_13975_EL_ACT_TIP
OTA ELU URL Main	Help Tip 1	OTA_13987_ELU_HYPERLINK_TIP
OTA ExtLinking URL Act Search Criteria	Help Tip 1	OTA_SS_ADVANCED_SEARCH_TIP
OTA ExtLinking URL Act Search Results	Help Tip 2	OTA_13970_ELU_ACT_RSLT_TIP
OTA ELU Center Search Criteria	Help Tip	OTA_SS_SIMPLE_SEARCH_TIP
OTA ELU Center Search Results	Help Tip 2	OTA_SS_TRN_CENTER_SEARCH_TIP
OTA ExtLinking URL Evt Search Criteria	Help Tip 1	OTA_13971_EL_EVT_SRCH_TIP
OTA ExtLinking URL Evt Search Results	Help Tip 2	OTA_13972_ELU_EVT_RSLT_TIP

Configurable FlexFields

Region	Attribute Name	Flexfield Name
OTA EL Activity Details DFF Region	Descriptive Flexfield	OTA_ACTIVITY_VERSIONS
OTA EL Activity Desc Flex Region	Descriptive Flexfield	OTA_ACTIVITY_VERSIONS
OTA EL Main Event Details Page	Descriptive Flexfield	OTA_EVENTS
OTA EL Event Location	Descriptive Flexfield	Address Location
OTA ELU Activity Desc Flex Region	Descriptive Flexfield	OTA_ACTIVITY_VERSIONS
OTA ELU Main Event Details Page	Descriptive Flexfield	OTA_EVENTS
OTA ELU Event Location	Descriptive Flexfield	Address Location
OTA EL Additional Enrollment Details Region 2	Descriptive Flexfield	OTA_DELEGATE_BOOKINGS

Configurable Profile Options

This module contains no configurable profile options.

10

Compensation and Benefits Management

Compensation and Benefits Management Overview

SSHR provides self-service functions within the following areas of Talent Management:

- Leave and Absence Management
- Compensation and Awards Management (Benefits Enrollment, Compensation Workbench, Individual Compensation Distributions)

This chapter looks in detail at the self-service functions available within these areas and provides information on the functionality and configuration options for each function:

Self-Service Compensation and Benefits Functions

Can I use SSHR to enroll in a benefits program?

Yes. You can use the self-service benefits enrollments functions to enroll yourself in any benefits program for which you are eligible. If you are a manager, you can enroll your employees or contingent workers in a benefits program.

Self-Service Benefits supports a variety of enrollment types including open, unrestricted, and life event enrollments for one or more flex or non-flex programs.

When a user logs on to Self-Service Benefits, the application determines eligibility. If a user is able to change their benefits at this time, the Benefits Enrollment Overview page is displayed. If the user cannot change their benefits at this time, the Current Benefits Overview page is displayed.

Do I still create the benefits plans and programs using the Professional User Interface (PUI)?

Yes. You still use the Benefits functionality in the PUI to create benefits plans and programs. You can update benefit-related information, for example, dependent information and personal information, using the self-service interface and this information is stored in the Oracle Applications database tables using standard Application Programmable Interfaces (APIs).

So I can use the Self-Service Benefits functionality to add dependents?

Yes. You can add, delete, or update dependents and family members using the self-service functions.

Some benefit plans use care providers. How does this work in SSHR?

If applicable, you can configure Self-Service Benefits so that your user can search for a primary care provider (PCP) using a web-based search of a PCP database. Alternatively, you can set up a free-form text field for your users to enter a primary care provider.

Apart from Benefits Enrollment, what other functionality is available?

SSHR also includes a module called Individual Compensation Distributions which enables you to assign bonuses and awards to eligible employees. SSHR also supports Absence Management and your employees can use the Absence Management function to enter absence-related information using a self-service interface.

And I can also access the Compensation Workbench using SSHR?

Yes. The Compensation Workbench is available from the delivered Manager Self-Service menu. Managers can use the Compensation Workbench to determine and allocate compensation awards.

Who can use Self-Service Benefits What-if?

HR Professionals, Managers and Employees can use Self-Service Benefits What-if. As a manager, you can use Self-Service Benefits What-if to model electability for benefits of employees in your security group, based on proposed changes to the person's HR record. As an employee, you can use Self-Service Benefits What-if to model changes to your benefits based on your electable choices, plan or option enrollment rate.

What does Self-Service Benefits What-if enable me to do?

Self-Service Benefits What-if enables you to model electability for benefits based on proposed changes to a person's HR record, before you make the actual change. When you model electability, changes are not saved to the database, so you can view different electability scenarios without having to manually save data.

As a manager, you can use Self-Service Benefits What-if to model electability for benefits of employees in your security group, based on proposed changes to the person's HR record. As an employee, you can view changes to your benefits based on your electable choices, plan or option enrollment rate.

Absence Management

Absences

The Absences module enables employees or managers to enter absence-related information in SSHR. You can request multiple absences and view them in a summary format. You can also view a history of absences you have taken and display current leave accrual balances. You can submit a planned absence request (before the absence is taken) or a confirmed request (either after the absence is completed or when dates have been finalized before the absence begins).

You can update absence requests as a manager or employee, for example, to change the absence dates or confirm the absence. Planned, confirmed, and updated requests can be submitted for approval. You cannot update requests when they are pending approval.

For more information on Absence Management, see: Absence Management and PTO Accruals, *Oracle HRMS Compensation and Benefits Management Guide*

Menu and Function Names

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

User Menu Name	Function Name
Leave of Absence	Leave of Absence

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Leave of Absence

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Leave of Absence Summary Top Page

Region	Tip Type	Message Name
Absence Summary	Instruction	HR_INST_LOA_SUMMARY

Create Leave of Absence Page

Region	Tip Type	Message Name
Create Leave Of Absence Main	Instruction	HR_INST_LOA_CREATE
Absence Details	Instruction	HR_INST_LOA_CREATE_ DETAILS

Update Leave of Absence Page

Region	Tip Type	Message Name
Update Main	Instruction	HR_INST_LOA_UPDATE
Update Details	Instruction	HR_INST_LOA_UPDATE_ DETAILS

Confirm Dates Top Page

Region	Tip Type	Message Name
Confirm Dates Main	Instruction	HR_INST_LOA_RETURN
Confirm Dates Details	Instruction	HR_INST_LOA_RETURN_ DETAILS

See: Configuring Tips and Messages, page 5-22

Configurable FlexFields

Create Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

View Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

Update Leave of Absence Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

Confirm Dates Top Page

Region	Flex Name	Flex Code
Additional Absence Details	Additional Absence Details	PER_ABSENCE_ ATTENDANCES
Further Absence Details	Additional Absence Detail Information	PER_ABS_DEVELOPER_DF

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable

Self-Service Benefits Enrollments

Self-Service Benefits Enrollments

Self-Service Benefits supports a variety of enrollment types, including open, unrestricted, and life event enrollments for one or more flex or non-flex programs.

The enrollment choices, price tags, and other information in Self-Service Benefits web pages are derived from Oracle Applications database tables using the rules of your plan design. Updated information is stored in the Oracle Applications database tables using standard Application Programmable Interfaces (APIs).

Self-Service Benefits supports enrollment for plans and options in a program. Use Oracle's professional forms interface or the self-service Individual Compensation Distribution web pages to enroll participants in all plans not in a program such as savings plans, Employee Stock Purchase Plans (ESPP), or 401(k) plans.

Self-Service Benefits Enrollment Functionality

Self-Service Benefits offers an employee the opportunity to:

- Review current, and future program benefits enrollments, and up to ten past enrollments, within the last two years
- Select benefits
- Distribute excess flex credits (Advanced Benefits)
- Add, update, or review family member information

  Note: Family member information entered through the self-service interface and personal contact data entered through the professional forms interface share the same table. Any data entered or updated in Self-Service HRMS or the professional forms interface is reflected in both interfaces.

- Add, update, or remove dependents

  Note: Self-Service requires dependents and beneficiaries to have the personal relationship check box checked on the Contacts window.

- Add, update, or remove beneficiaries

  Employees can select organizational beneficiaries provided that the administrator has entered the Beneficiary Organization using the professional forms interface, and selected the May Designate Organization as Beneficiary check box in the plan enrollment requirements.

- Search for and select primary care providers
- Print a temporary participant identification card

Enrollment Change Workflow Notifications

You can configure the Workflow Builder to send a notification to an HR professional whenever a participant updates a Self-Service Benefits Enrollment web page, excluding the Primary Care Provider page. The notification contains the following information and provides direct access to the Confirmation page for the participant, but is not linked to any Workflow approval process:

- Name of Employee
- Social Security Number or National Identifier
- Life Event Name
- Enrollment Period
- Selected Benefit Plans and Options
- List of Covered Dependents

Oracle Workflow sends a notification to a worklist or group that you maintain after the participant completes the enrollment update. If the participant closes the browser window prior to reaching the Confirmation page, Oracle Workflow sends a notification within one hour of the first enrollment change.

You can manually override the enrollment or contact the participant to correct and resubmit the election if necessary.

See: Self-Service Workflows, *Oracle HRMS Deploy Self-Service Capability Guide*

Hidden Fields in Self-Service Benefits

There are a number of fields that are delivered hidden by default on the self-service pages. You can choose to display them. They include:

- Coverage start and end dates for specific enrollments
- Cost 2 (after tax), 3 (taxable), and 4 (miscellaneous) columns for displaying multiple rates for a vertical display plan type
- Physician group and hospital, on the Primary Care Provider Search page
- Full name

See: Benefits Enrollments, page 10-12 for further details of these hidden fields and the regions where you can display them.

Displaying Descriptive Flexfields

The following descriptive flexfields can be entered in self-service Benefits:

- Additional Ben Prtt Enrt Rslt F Details (BEN_PRTT_ENRT_RSLT_F)

  You enter this flexfield data on the Benefits Information page, which appears after the Benefits Selection page if the flexfield has been set up and there are global segments, or segments defined for the selected plan type.

- Add'l Contact R'ship Det's (PER_CONTACTS)

  You enter this flexfield data in the Miscellaneous region of the Family Member Add page. You can also view or enter the flexfield data in the Personal Information module of SSHR.

- Further Person Information (Person Developer DF)

  You enter this flexfield data in the Name and Relationship region of the Family Member Add page.

If you have set up the Further Person Information or Additional Contact Relationship Details flexfields, you can choose to display some or all of the segments in self-service using the Personalization Framework. See: Configuring Flexfields, page 5-20

The Additional Ben Prtt Enrt Rslt F Details flexfield appears automatically if you define and freeze this flexfield. You must bounce the Apache server after freezing or unfreezing the flexfield to ensure that your changes are displayed.

Plan Type Context

You may want to display the Additional Ben Prtt Enrt Rslt F Details flexfield only for enrollment in specific compensation objects. For example, you may want to display prior years commission information to participants for a supplemental life insurance plan, while hiding commission information used to calculate group life insurance rates.

To display the flexfield differentially by compensation object, you must define a context for the flexfield based on BG_ID_PL_TYP_ID. On the Descriptive Flexfield Segments window, uncheck the Displayed check box for the context if you do not want to show the context poplist to the user. Notice that if you display this list, it will contain all the contexts for the flexfield (even those for other business groups) unless you restrict them by a value set defined for the context.

If there are frozen segments for the descriptive flexfield but no global segments defined and no segments defined for the selected plan type, the Benefits Information page appears in the enrollment chain but the region pertaining to this plan type does not display. Existing data set up in the flexfield is not affected by any new contexts you define for self-service.

Plan Design Considerations for Self-Service Benefits

Before eligible participants can enroll in self-service benefits using the self-service interface, you must design your benefit plan using Oracle's professional forms interface. The following topics look at the points you should consider when designing your plan for the self-service environment.

Legislative Configurations

Self-Service Benefits is delivered with US-style formatting for the following fields:

- Address
- Social Security Number
- Pre Tax Cost
- After Tax Cost

For non-US self-service implementations, you can edit field labels to fit your legislative requirements and you can also hide and unhide fields. For example, you may want to hide the list of States from the address fields.

> **Note:** The address style and country used by Self-Service Benefits is inherited from the primary benefits participant.

If your legislation or benefit plan design does not allow for after tax contributions, consider hiding the after tax columns on the tables contained in the following web pages:

- Benefits Enrollment Overview
- Current Benefits Overview
- Benefits Selection
- Confirmation

See: Setting Up Self-Service Benefits Web Pages, page 10-26

See: Benefits Enrollments, page 10-12 for a list of the configurable user interface elements in each delivered web page.

Integration with Authoria HR (US and UK)

The third party product Authoria HR provides a common knowledge repository to manage and communicate HR and benefits information.

After a self-service implementer defines a total compensation plan in the Oracle HRMS professional user interface, licensees of Authoria HR can configure links between Oracle HRMS and Authoria HR.

End users can click on links in the applicable self-service web pages to display context-sensitive Authoria HR documentation.

You can configure the following self-service enrollment windows for use with Authoria HR:

- Benefits Enrollment Overview page
- Current Benefits page
- Confirmation page
- Benefits Selection page

See Configuring Links Between Oracle Standard and Advanced Benefits and Authoria HR, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Multiple Rates

You can display up to four standard rates for each compensation object to enable employees to see employee and employer paid premiums, and related costs such as fringe benefit taxes and administrative fees. Multiple rates are displayed on the Overview, Benefits Selection, Current Benefits, and Confirmation pages.

Only vertical display Plan Types are able to be custom formatted in self-service to display multiple rates for a single compensation object. Due to display and sizing constraints, horizontal display Plan Types cannot display multiple rates. You can only display one standard rate per column.

When you define standard rates for self-service, you can select any activity type and tax type. However, you must check the Display on Enrollment check box (Processing Information tab) and you must specify the Self Service Display Order number (1 to 4).

When you display multiple rates, the column headings in self-service are Cost 1, Cost 2, Cost 3, and Cost 4. Otherwise, a single rate displays as either Pretax or Aftertax. You can change the column headings using the Personalization Framework.

When defining your standard rate, consider the following:

- For Costs 2, 3, and 4 you can select the Display on Enrollment check box (Processing Information tab of Standard Rates window) or the Enter Value at Enrollment check box (Calculation Method tab). However, do not select the Enter Annual Value check box on the Calculation Method tab. Annual Value can only be entered in Cost 1, if applicable.

- Costs 2, 3, and 4 can be used to calculate additional amounts, either based on the coverage or the amount in Cost 1. For example, if you charge a 2% administration fee for a spending account, you would set up the rates as follows:

  Coverage-Check the Enter Value at Enrollment box

  Cost 1 = *Contribution* - Select Same as Coverage as the Calculation Method

  Cost 2 = *Administration Fee* - Select Multiple of Coverage as the Calculation Method (0.02 * coverage, in this example)

  Cost 3 = *Total Cost* - Select Multiple of Coverage as the Calculation Method (1.02 * coverage, in this example)

Benefits Pools (Advanced Benefits)

If you are displaying multiple rates, you may not want them all deducted from flex credits. Use the Application tab on the Benefits Pool window to determine which standard rate to deduct. All rates selected on this tab are included in the Flex Credit Used Total. Unused Flex Credits (rollovers) displayed are not impacted by the use of multiple rates.

Flexible Spending Accounts (US)

To ensure that your qualifying participants can enroll in Flexible Spending Account (FSA) plans using Self-Service Benefits, you must set up your plans using one of the following two methods:

The preferred method is to use the Plan Types window to define one plan type for each FSA plan. For example, you define one plan type for Dependent Care FSA plans and a second plan type for Health Care FSA plans. For each plan type, you define the coverage plan or plans into which participants and their dependents can enroll. You also define a **decline coverage** plan which is linked to each plan type.

Alternatively, you can set up one FSA plan type that covers both dependent care and health care plans. Within this plan type, you define plans for both dependent care and health care. Then, within these plans, you link **options** for both selecting and declining coverage.

Other items for consideration:

- When you define the activity rate for the FSA plan, check the Enter Value at Enrollment field in the Calculation Method region of the Standard Rates window.
- Select Set Annual Rate Equal to Coverage as the calculation method.
- In the Coverages window, define the minimum and maximum contribution amounts for the FSA plan. Indicate that values for this plan are entered at enrollment.

Flexible Benefits Programs (Advanced Benefits)

With Flexible Benefits Programs, you can offer flex credits to eligible participants to offset the cost of benefits. When you defining a benefit program in the Programs window, select the same periodicity for the activity reference period (the time period in which the system expresses activity rates) and the enrollment rate frequency (the activity rate that is communicated to participants). This ensures that the price tags for selecting benefits and the flex credits available to participants are expressed for the same time period.

Other items for consideration:

- Unless your flex credits are determined using the result of a calculation, you indicate the number of flex credits associated with a compensation object by entering the value in the Flat Amount field in the Calculation Method region of the Flex Credits window.
- You must set up a flex credits *placeholder plan* and link this plan to the flex program. This plan records the total flex credits for the program. Define a rate for this plan by entering zero in the Flat Amount field of the Calculation Method region of the Standard Rates window.
- Set the processing type of the corresponding element to Recurring.

Temporary Participant Identification Cards

A temporary identification card allows a participant to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider. Using Self-Service Benefits, a participant can print one card for each elected plan that allows for temporary identification cards. The participant can also print a card for each covered dependent.

The application generates a temporary ID card upon:

- Enrollment
- Re-enrollment
- Change in Enrollment
- Participant Request (due to loss)

The identification card includes information such as:

- Employee Name and Social Security Number
- Member Name and Social Security Number (for dependents)
- Employer Name
- Plan Name

You indicate that a plan allows for the printing of temporary ID cards by checking the Allow Temporary Identification field on the Plans window.

Declining Coverage

Depending on your plan design, you must set up either a decline coverage plan or option that allows a participant to waive an enrollment opportunity for which they are otherwise eligible.

If a plan type contains multiple plans, you create a *decline coverage plan* in the Plans window (in addition to the regular plans) and indicate that the plan is of the specified plan type. If a plan type has only one plan, you define a *decline coverage option* and link it to the plan. This ensures that participants can either select or decline benefit coverage.

> **Note:** If your plan design *requires* that a participant select at least one option from a group of options or at least one plan from a group of plans, do not define a decline coverage plan or option.

Self-Service Benefits What-if

Self-Service Benefits What-if enables you to model electability for benefits based on proposed changes to a person's HR record, before you make the actual change. When you model electability, the database does not save changes, so you can view different electability scenarios without having to manually save data.

The Self-Service Benefits What-if page is available from Manager and Employee Self-Service Responsibilities. To ensure that certain data is not visible to all users, as an administrator, you can define roles for Self-Service Benefits What-if. Managers can review changes to benefits for employees in their security group that would result from proposed changes to the employee's HR record. Employees can view changes to their benefits based on proposed data changes to their HR records. The comparison is in terms of their electable choices, plan or option enrollment rate.

As a manager or an employee, you can compare current benefits with the proposed benefits based on the electable choices, and a plan or option enrollment rate. For example, you can view the benefits impact of relocation or a change in weekly hours worked.

See: Modeling a Person's Benefits Eligibility (Advanced Benefits), *Oracle HRMS Compensation and Benefits Guide*

The system does not allow you to model electability if current life events are in progress. What-if electability depends only on the data changes you elect to model. Using the HRMS System Administrator responsibility, you need to enable the Benefits Compensation Objects Extra Information Type (EIT). This EIT enables you to add information about the type of compensation object such as program, plan type, compensation object name, and a flag indicating whether the compensation object is visible to the user.

See: Setting Up Extra Information Types Against a Responsibility, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

You also define the What-if Label that displays to users who perform the what-if modeling, and the life events for compensation objects and link one or more person changes to each life event.

See: Setting Up What-if Modeling, *Oracle HRMS Compensation and Benefits Management Guide*

You can use the HRMS System Administrator responsibility to configure Self-Service Benefits What-if so that managers only view changes to benefits for employees in their security profile.

By default, the Self-Service Benefits pages do not display some fields. However, you can choose to display them using the Personalization Framework.

See: Benefits Enrollments, page 10-25

Benefits Enrollments

This topic provides reference information you need to configure your Self-Service Benefits web pages using the Personalization Framework.

For **instruction text**, the tables below list--by web page region--the communication short name and the valid communication usages that are required when you define a communication type to display instruction text for a particular program, plan type, plan, or life event.

See: Defining Self-Service Instruction Text, page 10-33

Hidden Fields: This topic also lists--by web page region--all fields the application delivers as hidden which you can display using the Personalization Framework.

For example, by default all person name fields in Self-Service Benefits display names in the format 'First Last Suffix' (without commas between the parts of the name.) You can add the Full Name field to a web page and remove the delivered Name field. In the US, the Full Name field uses the format 'Prefix Last, First Middle Suffix'.

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Self-Service Benefits Enrollment - Employee
Employee Self-Service	Self-Service Benefits Enrollment - Federal

Configurable Pages and Shared Regions

The following definitions can be configured using the Personalization Framework:

Family Members and Others, and Family Members and Others Detail Page

The Family Members and Others page enables a participant to view a record of their family members and other persons enrolled as dependents or beneficiaries of their benefits. Benefits participants can add another person to the Family Members and Others table by choosing the Add Another Person button, which opens the Family Members and Others Details page.

This page only displays when a person has either:

- An enrollment opportunity
- Eligibility for an unrestricted program
- A detected or unprocessed potential life event as of the system date

If one of these conditions does not exist, the application opens the Current Benefits page.

The seeded life event reason of *Added During Enrollment* prevents a life event from occurring when you create a family member or update a family member's details. If you define a life event reason of the type Personal, that you make Selectable for Self Service, you can trigger a life event when a person enters or deletes a contact on the Self-Service Human Resources Contacts page and selects a relationship start or end reason.

> **Note:** It is recommended that you provide instruction text indicating that eligibility for benefits may be based on family members. However, you cannot use communication usages to restrict the display of instruction text to a compensation object or a life event for the Family Members page.

Hidden Field: Use the BEN_FAMILY_MBRS_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Family Members and Others

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Members Content	Instruction		FML.FAM ILY_MBRS_ CONTENT	Program, Life Event
Family Members Content	Help Tip			

Family Members and Others Detail Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Add or Update Family Members	Instruction		FML.FAM_ ADD_ CONTENT	Program, Life Event
Name and Relationship	Instruction		FML.FAM_ ADD_NAME	Program, Life Event
Address	Instruction		FML.FAM_ ADD_ADDRESS	Program, Life Event
Miscellaneous Information	Instruction		FML.FAM_ ADD_OTHER	Program, Life Event
Second Medical Coverage	Instruction		FML.FAM_ ADD_SECOND_ MEDICAL	Program, Life Event
Address	Help Tip			
Name and Relationship	Hint (Suffix)	92638	—	—
Address	Hint (Postal Code)	92639	—	—
Miscellaneous Information	Hint (National Identifier)	92640	—	—
Miscellaneous Information	Hint (Date of Birth)	92637	—	—
	Message (Required Field Missing)	92601	—	—
	Message (Invalid Birth Date)	92598	—	—

Configurable FlexFields

Family Members and Others Page

Region	Flex Name	Flex Code
Add or Update Family Members	Further Person Information	hrpersondevdfflex
Miscellaneous Information	Additional Contact Relationship Details	Add Cont Details D Flexfield

See: Configuring Flexfields, page 5-20

Benefits Enrollment Overview Page

The Benefits Enrollment Overview web page enables a participant to view a record of their current benefits and to enroll into a new set of benefits.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_SELECTIONS_TABLE
- BEN_OVW_CVRD_DEPS_TABLE
- BEN_OVW_BENEF_TABLE
- BEN_OVW_PCP_TABLE

You can use the BEN_OVW_SELECTIONS_TABLE region to display a column for the taxable cost of a benefit. This column corresponds to a standard rate with an activity type of Self-Service Display, or--if you are displaying multiple rates for the compensation object--to the rate you have defined with 3 in the Self Service Display Order field. If you are displaying multiple rates, you can also display the Cost 2 (After Tax Cost) and Cost 4 (Miscellaneous) columns to show the rates you have defined with 2 and 4 in the Self Service Display Order field.

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Benefits Enrollment Overview Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Enrollment Overview Content	Instruction		BEO.ENRL_ OVERVIEW_ CONTENT	Program, Life Event
Flex Credits	Instruction		BEO.FLEX_ CREDITS	Program, Life Event
Flex Credit Summary	Instruction		BEO.OVERV IEW_FC_ SUMMARY	Program, Life Event
Flex Credit Rollovers	Instruction		BEO.FLEX_ CREDIT_ ROLLOVERS	Program, Life Event
Benefit Selections	Instruction		BEO.OVERV IEW_SELECT IONS	Program, Life Event
Covered Dependents	Instruction		BEO.OVERV IEW_CVRD_DE PS	Program, Life Event
Beneficiary Enrollment Overview	Instruction		BEO.ENRL_ OVERVIEW_ BENEF	Program, Life Event
Primary Care Providers Enrollment Overview	Instruction		BEO.ENRL_ OVERVIEW_ PCP	Program, Life Event
Enrollment Overview Content	Message (No Enrollment Opportunity, Brief Message)	92570	--	--
Enrollment Overview Content	Message (No Enrollment Opportunity, Detail Message)	92571	--	--

Current Benefits Overview Page

The Current Benefits Overview web page enables a participant to see a record of their current benefits.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_CVRD_DEPS_TABLE
- BEN_OVW_BENEF_TABLE

- BEN_OVW_PCP_TABLE

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Current Benefits Overview Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Current Benefits Overview Content	Instruction		CBO. CURRENT_ OVERVIEW_ CONTENT	Program
Flex Credits	Instruction		CBO.FLEX_ CREDITS	Program
Flex Credit Summary	Instruction		CBO.OVERV IEW_FC_ SUMMARY	Program
Flex Credit Rollovers	Instruction		CBO.FLEX_ CREDIT_ ROLLOVERS	Program
Benefit Selections	Instruction		CBO.OVERV IEW_SELECT IONS	Program
Covered Dependents	Instruction		CBO.OVERV IEW_CVRD_DE PS	Program
Beneficiary Overview	Instruction		CBO.ENRL_ OVERVIEW_ BENEF	Program
Primary Care Providers Overview	Instruction		CBO.OVERV IEW_PCP	Program
Current Benefits Overview Content	Message (No Current Enrollment, Brief Message)	92572	—	—
Current Benefits Overview Content	Message (No Current Enrollment, Detail Message)	92573	—	—

Benefits Selection Page

The Benefits Selection page enables a participant to select one or more plans in which to enroll.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Enrollment Selection Content	Instruction		BNS.ENRT_ SELECTION_ CONTENT	Program, Life Event
Top Flex Credit Region	Instruction		BNS.ENRT_ SELECTION_ CR_TOP	Program, Life Event
Bottom Flex Credit Region	Instruction		BNS.ENRT_ SELECTION_ CR_BOTTOM	Program, Life Event
Selection Area	Instruction		BNS.ENRT_ SELECTION_ SELECT_AREA	Program, Plan Type, Life Event
Selection Area	Help Tip (Certification Legend)			
Selection Area	Help Tip (Enter Annual Rate Input Box, Long Tip)			
Selection Area	Help Tip (Enter Rate Input Box, Long Tip)			
Selection Area	Help Tip (Enter Benefit Amount Input Box, Long Tip)			
Selection Area	Message (Enter Annual Rate, Long Tip)	BEN_ENRT_ ANN_RTVAL_ TIP		
Selection Area	Message (Enter Rate, Long Tip)	BEN_ENRT_ BNFTAMT_TIP		
Selection Area	Message (Enter Benefit Amount Tip)	BEN_ENRT_ RTVAL_TIP		
Selection Area	Message (Tokens for above messages)	BEN_ENRT_ SLECT_TIP_ ANY_AMOUNT		
Selection Area	Message (Tokens for above messages)	BEN_ENRT_ SLECT_TIP_ ANY_VALUE		

Dependents Selection Page

The Dependents Selection page enables a participant to add their dependents to a plan.

> **Note:** For Advanced Benefits customers: if participant dependents are not displaying in this page, verify that you have linked the appropriate life events to the program or plan enrollment requirements in the Dependent Change of Life Event window.

Hidden Field: Use the BEN_ENRL_DEPEN_SELECTION_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Dependents Selection Page

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Dependents Selection	Instruction		--	--
Dependents Selection	Instruction		DPS.ENRL_DEPENDENTS_CONTENT	Program, Life Event
Dependents Selection	Hint (Dependent Table)		DPS.ENRL_DEPENDENTS_CONTENT_PL	Program, Plan Type, Plan, Life Event
Dependents Selection	Message (Can’t Designate)	92588	—	—

Beneficiary Selection Page

The Beneficiary Selection page enables a participant to add their beneficiaries to a plan.

Hidden Field: Use the BEN_BENEF_SELECTION_TABLE region to add the hidden Full Name field to the page and to remove the Name field if necessary.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Beneficiary Selection	Instruction (Page)		BFS.BENEF ICIARY_ CONTENT	Program, Life Event
Beneficiary Selection	Instruction (Plan Level Table)		BFS.BENEF ICIARY_ CONTENT_ PLAN	Program, Plan Type, Plan, Life Event
Family Members and Others	Instruction		BFS.BENEF ICIARY_ CONTENT_FAM ILY	Program, Plan Type, Plan, Life Event
Organizations	Instruction		BFS.BENEF ICIARY_ CONTENT_ ORGS	Program, Plan Type, Plan, Life Event
Beneficiary Totals Table	Hint			
Beneficiary Selection	Message (Can't Designate)	92587	—	—

Primary Care Provider Page

The Primary Care Provider page enables a participant to select a care provider. If your enterprise partners with a third party supplier of primary care provider information, you can configure this page to allow web-based searches of a database of provider information.

See: Configuring the Primary Care Provider Search Facility, page 10-34

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Primary Care Provider Selection Content	Instruction	Instruction	PCP. PcpSelectContent PageLevel	Program, Life Event
Primary Care Provider Selection Content	Instruction	Instruction	PCP. PcpSelectContent PlanLevel	Program, Plan Type, Plan, Life Event
Primary Care Provider Selection Content	Hint		—	—
Primary Care Provider Selection Content	Message (Can't Designate)	92567	—	—

Primary Care Provider Summary and Search Pages

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_PCP_SEARCH_TABLE
- BEN_PCP_SELECT_TABLE

On the Primary Care Provider Search page, you can use the BEN_PCP_SEARCH_CR ITERIA region to add the hidden fields of Physician Group and Hospital. The hidden fields of Location, School, and Degree are reserved for future use.

For the Physician Group, Hospital, Language, and Specialty fields, you must load the available data as provided by your third party provider into the corresponding Lookup Codes--in the following order--using the Application Utilities Lookups window in the Professional User Interface.

- BEN_PCP_MED_GRP
- BEN_PCP_HOSPITAL
- BEN_PCP_LANGUAGE
- BEN_PCP_SPCLTY

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Primary Care Provider Search	Instruction		PCS.PCP_ SEARCH	Program, Plan Type, Plan, Life Event
Search	Instruction		PCS.PCP_ SEARCH_CR ITERIA	Program, Plan Type, Plan, Life Event
PCP Result Table	Instruction		PCS.PCP_ SEARCH_ RESULT	Program, Plan Type, Plan, Life Event
Ben PCP XML Request Params	Tip			
Ben PCP XML Request Params	Message (No PC Ps found)			

Confirmation Page

The Confirmation page enables a participant to see a summary of their choices and a warning of any oversights or miscalculations they may have made.

> **Note:** You can also use the Confirmation page to display a *signature region* for participants to print from their web browser. Use this region if you require a participant's signature as part of a benefits enrollment. Use the Personalization Framework to display the signature region for this page.

Hidden Fields: You can use the following regions to add the hidden Full Name field to the page and to remove the Name field if necessary.

- BEN_OVW_BENEF_TABLE
- BEN_OVW_CVR_DEPS_TABLE
- BEN_OVW_PCP_TABLE

You can use the BEN_OVW_SELECTIONS_TABLE region to display a column for the taxable cost of a benefit. This column corresponds to a standard rate with an activity type of Self-Service Display, or--if you are displaying multiple rates for the compensation object--to the rate you have defined with 3 in the Self Service Display Order field. If you are displaying multiple rates, you can also display the Cost 2 (After Tax Cost) and Cost 4 (Miscellaneous) columns to show the rates you have defined with 2 and 4 in the Self Service Display Order field.

You can also use the BEN_OVW_SELECTIONS_TABLE region to display Coverage Start and End Date columns. These columns show the coverage start and end dates for each election.

Region t	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Ben Enrollment Confirmation Content	Instruction		BEC.ENRL_ CONF_ CONTENT	Program, Life Event
Flex Credits	Instruction		BEC.FLEX_ CREDITS	Program, Life Event
Flex Credit Summary	Instruction		BEC.OVERV IEW_FC_ SUMMARY	Program, Life Event
Flex Credit Rollovers	Instruction		BEC.FLEX_ CREDIT_ ROLLOVERS	Program, Life Event
Benefit Selections	Instruction		BEC.OVERV IEW_SELECT IONS	Program, Life Event
Covered Dependents	Instruction		BEC.OVERV IEW_CVRD_DE PS	Program, Life Event
Beneficiaries Enrollment Confirmation	Instruction		BEC.ENRL_ CONF_BENEF ICIARIES	Program, Life Event
Primary Care Providers Enrollment Confirmation	Instruction		BEC.ENRL_ CONF_PCP	Program, Life Event
BEN_ENRL_ CONF_WARN INGS	Message (Confirmation Success)	92605	—	—
BEN_ENRL_ CONF_WARN INGS	Message (Action Item Warning)	92606	—	—

Configurable FlexFields

Confirmation Page

Region	Flex Name	Flex Code
Benefit Selections	Additional Ben Prtt Enrt Rslt F Details	N/A

Unused Flex Credits Page

The Unused Flex Credits page provides a summary of the flex credits left unspent by a participant.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Unused Flex Credits Content	Instruction		FLX.UNUSED_ FLEX_CREDIT_ CONTENT	Program, Life Event
Unused Flex Credits Content	Instruction		FLX.UNUSED_ FLEX_CREDIT_ NONE	Program, Life Event
Unused Flex Credits Content	Message (No Unused Flex Credits)	92633	—	—
Unused Flex Credits Content	Message	92632	—	—

Change Session Date Page

The Change Session Date page lets you test future-dated elections. For example, you may want to perform system testing before the start of an open enrollment period. This page should be removed in your production environment so that benefits participants do not alter their enrollment date.

See: Setting the Effective Date of a Scheduled Enrollment in Self-Service Benefits, page 10-31

Region	Tip Type	Message Name
Session Date Content	Instruction	92604
Session Date Content	Tip (Effective Date)	92637

Temporary ID Card Page

The Temporary ID Card page lets a participant print an ID card which the participant can use to obtain medical, dental, or other benefit treatment before the participant receives the official membership card from the provider.

Region	Tip Type	Message Name	Required Communication Short Name	Valid Communication Usages
Oracle Self-Service Human Resources Identification Card	Instruction		TMP.ENRL_TEMP_ID_PAGE	Program, Life Event
Ben Temporary ID Card Content	Instruction		TMP.ENRL_TEMP_ID_PLAN	Program, Plan Type, Plan, Life Event
Temporary ID Card	Instruction		TMP.ENRL_TEMP_ID_CARD	Program, Plan Type, Plan, Life Event

See: Configuring Web Pages, page 5-15

Self-Service Benefits What-if Pages

You can access Self-Service Benefits What-if from the following menus and functions:

Menu and Function Names

User Menu Name	Function Name
Manager Self-Service	Self-Service Benefits What-if Manager
Employee Self-Service	Self-Service Benefits What-if Employee

You can configure the following definitions using the Personalization Framework.

Configurable Tips and Instructions

Region	Tip Type	Message Name
Impact on Benefits Region	Header Text	BEN_93423_SS_WATIF_HDR_LABEL
Choose Winning Life Event Region	Message (Error)	BEN_93393_WATIF_CONFLICT_LER
Choose Winning Life Event Region	Instruction	BEN_93392_WATIF_CNFLT_LER_INS
Effective Date Region	Instruction	BEN_93389_WATIF_EFF_DATE_INS
Associated Data Changes Region	Instruction	BEN_93391_WATIF_DATA_CHG_INS
Impact on Benefits Region	Instruction	BEN_93394_WATIF_PG_INS_TEXT

You can personalize the following columns to display them:

Seeded Hidden Columns

Column Name	Displayed Detail
Reference Period	Activity Reference Period
Current Electable	Compensation objects currently electable
Current Coverage	Coverage information about currently electable compensation objects
Current Defined Amount	Defined Amount
What-If Electable	Compensation objects based on the what-if modeling
What-If Coverage	Coverage information about compensation object based on the what-if modeling
What-If Defined Amount	Defined Amount based on what-if modeling

Setting Up Self-Service Benefits Enrollments

You must complete your plan design in the professional forms interface before you can view a self-service benefits enrollments web page. If you license Advanced Benefits, you can run the Participation Batch Process from the Concurrent Manager to create electable choices for eligible participants.

If you use Standard Benefits, or if you are an Advanced Benefits customers using the **unrestricted** enrollment method, you can begin to allow participant enrollments after you create your plan design. The application creates the self-service enrollment page when the person logs into Self-Service Benefits.

To set up self-service benefits enrollments:

1. Review the sample benefits web pages. You can configure the following elements using the Personalization Framework:

   - Section titles
   - Table Layout
   - Hints
   - Tips
   - Fields (you can choose to display fields that are hidden by default)
   - Field labels

   See: Configuring Web Pages, page 5-15

2. Define instruction text for each web page region. You do this by defining a communication type and associating the instruction text with a web page Region.

   See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

   You can include a link in your instruction text to another web site using HTML syntax. You could create a link to reference information contained in a summary plan description. For example:

   See the Vision Medical web site for more information.

   In this example, the application opens the web page in a new browser window.

3. Define when you want the instruction text displayed. You can vary the instruction displayed according to:

   - Program
   - Plan Type
   - Plan
   - Life Event (Advanced Benefits)

   See: Defining When to Use a Benefits Communication, *Oracle HRMS Compensation and Benefits Management Guide*

4. Create a hypertext link from a compensation object to a web page which describes that program, plan type in program, plan in program, plan, or option in plan. To create a hypertext link, use one or more of the following windows:

   - Programs (for a program)
   - Plan and Plan Type window (for a plan or a plan type in program)
   - Plans window (for a plan)
   - Maintain Plan Options window (for an option in a plan)

   The link appears in the Benefits Selection web page, or--for Programs--the Overview page.

See: Defining a Benefits Program, *Oracle HRMS Compensation and Benefits Management Guide*

5. Review Messages and change any that do not meet your requirements.
6. Configure Action Item messages (Advanced Benefits) to meet your requirements.

   The application displays Action Item messages at the end of the enrollment process on the Confirmation page.

   See: Enrollment Action Types in Enrollment Requirements, *Oracle HRMS Compensation and Benefits Management Guide*
7. Set up any life event reasons that you want to trigger when a user adds, updates, or deletes a family member contact in Self-Service Benefits.

   See: Defining General Characteristics of Life Event Reasons, *Oracle HRMS Compensation and Benefits Management Guide*
8. Configure whether benefits participants have the option to select a Primary Care Provider (PCP) for a benefits plan.

   See: Maintaining Primary Care Providers for a Plan, *Oracle HRMS Compensation and Benefits Management Guide*
9. Configure whether you want benefits participants to have access to the Primary Care Provider Search facility.

   See: Configuring the Primary Care Provider Search Facility, page 10-34

Enabling Self-Service Benefits Enrollment Notifications

You can configure Self-Service Benefits Enrollments so that an enrollment update generates a notification to an HR professional.

To enable enrollment notifications, you update one of the seeded functions in the Form Functions window using the system administrator responsibility.

See: Enrollment Change Workflow Notifications, page 10- 6

To enable Self-Service Benefits Enrollment Notifications:

1. Query the function that you want to update. Choose one of the following:
   - Employee Self-Service (BEN_SS_BNFT_ENRT)
   - Manager Self-Service (BEN_SS_MGR_ENRT)
2. Choose the Form tab.
3. In the Parameters field, verify that the following parameter appears:

   displayDate=N&allowEnrt=Y&sessionDate=&sendFYINotification=N&wf ProcessName=FYI_NOTIFICATION_PRC.

   > **Note:** If you do not see this string, you must manually enter the parameter.
4. To enable workflow notifications, replace sendFYINotification=N with sendFYINotification=Y.

5. Replace the wfProcessName=FYI_NOTIFICATION_PRC portion of the parameter with your custom process name.
6. Save your work.

Setting Up User Access to Self-Service Benefits

Self-Service Benefits functions are attached to the Benefits Self-Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

If you create a new submenu, you must update the AK regions which point to the submenu.

See: Configuring Tabbed Regions, page 5-21

To set up user access to self-service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self-Service Menu in the Menu field: HR_EMPLOYEE_DIRECT_ACCESS_WEB. The following Self-Service User Menu Name displays to users:
   - Employee Self-Service

   You can change the menu name if required.
4. Query the Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:
   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.
   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self-service web page.
5. Save your work and close the Menus window.
6. If you create a new submenu, you must update the AK regions which point to the submenu.

   Complete steps 2 to 7 to update the region items, or proceed to step 8 if you do not intend to create any new submenus.

   See:Configuring Tabbed Regions, page 5-21
7. Using an AK Developer responsibility, log on to the application.
8. Open the Regions window.
9. Query one of the following regions in the Region ID field:
   - BEN_BENEFICIARY_PAGE

- BEN_CURR_OVW_PAGE
- BEN_ENRL_CONF_PAGE
- BEN_ENRL_DEPENDENTS_PAGE
- BEN_ENRL_OVERVIEW_PAGE
- BEN_ENRT_SELECTION_PAGE
- BEN_FAMILY_MBRS_PAGE
- BEN_FAM_ADD_PAGE
- BEN_PCP_SEARCH_PAGE
- BEN_PCP_SELECT_PAGE
- BEN_UNUSED_FLEX_CREDIT_PAGE

10. Choose the Region Items button to open the Region Items window.
11. In the Attribute Name column, select the Application Menu entry.
12. Scroll to the Menu Name column and update the field with the new menu as entered in the Menu field of the Menus window.
13. Repeat for each region listed in step 9.
14. Save your work and close the Region Items window.
15. You can use the Form Functions window to customize the seeded functions--BEN_SS_BNFT_ENRT and BEN_SS_MNGR_ENRT.
16. Use the Form Functions window to create your own Self-Service Benefit functions from the sample functions supplied. The sample User Function Names are:

    - Self Service View Current Benefits
    - Self Service Benefits Enrollment

    The Function Names are:

    - BEN_SS_CURR_BNFT
    - BEN_SS_BNFT_ENRT

    If you update the seeded functions, you must update your custom function to use the seeded parameters and HTML Calls.

    > **Note:** It is a good practice to check the Readme for each Self-Service Benefits patch you apply to see if the parameters and HTML Calls for the seeded functions have changed.

17. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:

    - HR: Security Profile

    > **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

18. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:
    - HR: Business Group
19. Define the people you would like to access Self-Service Benefits.

    There are two ways to do this. You can follow the typical steps for defining a new user and assign each user a responsibility that enables access to Self-Service Benefits, one at a time.

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

    See the White Paper titled: *Batch Creation of User Accounts*, available from MetaLink.

Setting the Effective Date of a Scheduled Enrollment in Self-Service Benefits

Self-Service Benefits provides different ways of controlling the date on which the application records a participant election:

- The Change Session Date web page (for testing environments in both Standard and Advanced Benefits)
- The Change Session Date menu parameter (Standard Benefits)
- Normal date processing based on the session date (Advanced Benefits)

The Change Session Date web page lets you test future-dated elections, such as for an upcoming open enrollment period.

Use the Change Session Date menu parameter if you use Oracle Standard Benefits and you want to record the life event occurred date of an enrollment for a date that is not equal to the system date.

For example, if you schedule your open enrollment period for the first two weeks in November, you can set the session date to record all enrollments as of January 1st of the following year.

> **Note:** You can use both features simultaneously, but the date the user enters in the Change Session Date web page overrides the session date parameter for the current session.

To set the session date in Self-Service Benefits:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to set the session date. Choose from:
    - BEN_SS_BNFT_ENRT (Employee Self-Service Benefits)
    - BEN_SS_MGR_ENRT (Manager Self-Service Benefits)
4. Choose the Form tab.
5. Update the seeded parameter to display the Change Session Date page or to set the effective date to a date you choose.

Note: If you do not set the session date, Self-Service Benefits processes dates based on the date codes you select in your plan design.

In the following example, setting *displayDate=Y* displays the Change Session Date web page. Setting *&sessionDate=12/31* sets the session date to December 31st for the BEN_SS_MGR_ENRT function.

displayDate=Y&sessionDate=12/31&pFromPersonSearch=Y&pFormFunction=BEN_SS_MGR_SRCH

You enter the session date in *mm/dd* format. Do not include the year.

Note: You should remove this web page from your production environment by setting displayDate=N so that benefits participants cannot alter their enrollment date.

Deriving the Year of the Session Date

The application derives the year to use for the session date, so you should not include a year in the session date parameter.

If you enter a session day and month that is prior to or equal to the *system* day and month, the application uses the following year. If you enter a session date that is later than the system day and month, the application sets the session date to the current year.

Configuring Unrestricted Program Enrollment Processing

Whenever a participant accesses the Benefits function in Self-Service Benefits, the Participation Process evaluates the participant's eligibility for unrestricted program enrollments. During an annual open enrollment period, with many participants accessing the application at once, this can impede system performance.

To reduce system load, you can restrict when the application re-evaluates unrestricted programs for a participant.

Also, you can remove access to the Benefits Enrollment Overview web page during those periods when you do not want participants to enter or update benefits elections for any event. In these instances, participants can still view their past, current, and future elections using the Current Benefits Overview web page.

To configure unrestricted program enrollment processing:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.
2. Choose the Description tab.
3. Query the Function Name for which you want to configure unrestricted enrollment processing. Select one of the following:
   - BEN_SS_BNFT_ENRT (Self-Service Benefits Enrollment - Employee)
   - BEN_SS_MGR_ENRT (Self-Service Benefits Enrollment - Internal Use)
4. Choose the Form tab to display the following parameter:

displayDate=Y&allowEnrt=Y&sessionDate=&sendFYINotification=Y&wfProcessName=FYI_NOTIFICATION_PRC&ssProcessUnrestricted=Y

5. If you do not see the parameter, enter the parameter string as listed above.
6. To force the Participation Process to re-evaluate a participant for each access of the Benefits function, leave the seeded parameter ssProcessUnrestricted=Y. Use this setting during open enrollment.
7. To disallow unrestricted enrollments in Self-Service Benefits, update the seeded parameter by setting ssProcessUnrestricted=N. Use this setting outside of your Open Enrollment period to prevent Self-Service enrollments.
8. Set ssProcessUnrestricted=P to restrict Unrestricted enrollment evaluation during your Open Enrollment period to the following scenarios:
   - This is the first time the application has evaluated the unrestricted event for the person, and no unrestricted events exist for the person.
   - The Participation Process has not processed the unrestricted event for the current annual enrollment period, and the current session date is later than the existing unrestricted life event occurred on date.
   - The Life Event Occurred On Date for the unrestricted event equals the session date, and there is a person change made after the last unrestricted process run to one of the following tables.
     - Per_addresses
     - Per_all_assignments_f
     - Per_all_people_f
     - Per_contact_relationships
     - Per_pay_proposals
     - Per_periods_of_service
     - Per_qualifications
     - Ben_per_bnfts_bal_f
     - Per_absence_attendances
     - Per_person_type_usages_f
9. Save your work.

Defining Self-Service Instruction Text

Use the Communication Types window in the Professional User Interface to define regional instruction text for Self-Service Benefits Enrollments and Individual Compensation Distributions.

You can vary the instruction text that displays in a region based on different criteria, such as the presence of a life event or enrollment in a particular compensation object.

To define a communication type:

1. Enter a Name for the communication type you are defining.
2. Enter a Short Name for this communication type.

Note: Self-Service uses the short name to link the instruction text you write to a specific region in a Self-Service Benefits web page. You must enter the short name in the following format: **BEN.REGIONNAME**. Exclude the **BEN** prefix from the regionname portion of the short name.

See: Benefits Enrollments, page 10-12 for a list of the required short names for each web page region.

3. Select a To Be Sent code of Not Applicable.
4. Select a Usage type of Self Service Instruction Text to indicate you are configuring a self-service web page.
5. Save your work.
6. Choose the Usages button.
7. Select a value for one or more of the following parameters to limit the conditions under which instruction text is displayed.
   - Life Event
   - Program
   - Plan
   - Plan Type
   - Enrollment Period
   - Action
8. Select a Usage Rule if your criteria for determining the conditions under which instruction text is generated cannot be fully accommodated by the usage criteria on this window.
9. Enter instruction text in the Self Service Instruction Text field that corresponds to the region of the self-service web page that you are configuring.
10. Save your work.

Configuring the Primary Care Provider Search Facility

As part of a self-service enrollment, a benefits participant can select a primary care provider (PCP) for a benefit plan. As a system administrator, you can configure Self-Service Benefits so that a participant can select a primary care provider through a web-based search of a PCP database.

Self-Service Benefits also supports free form text entry of primary care providers without validation when a repository of PCP data is not used.

Follow the instructions below based on the search type configured by your enterprise.

Setting up an XML-Enabled Primary Care Provider Search

If the search criteria entered by a benefits participant is formatted as an XML search request for use with a database of primary care providers (maintained by your enterprise or a third party), you use the Personalization Framework to configure information such as the URL of the information provider and the Document Type Definition (DTD) used by the search.

Note: If you change your PCP Search Configuration, you must delete any Personalization changes and re-enter the PCP configuration data.

To set up an XML-enabled primary care provider search:

1. Navigate to the Primary Care Provider Search page from the Self-Service Benefits Enrollments menu.
2. Choose the Personalize Ben PCP XML Request Params link.
3. Select a Personalization Level.
4. Choose the Advanced Settings button.
5. Select the Ben PCP Provider Information item and enter the URL of the information provider in the New Column Name field.

   Note: Enter the URL as you would in the Address or Location field of your web browser. Do not enclose the URL in quotations.

6. Select the Ben PCP XML DTD item and enter the URL of the XML Document Type Definition in the New Column Name field.
7. Select the Ben PCP Info Provider Client ID item and enter the Client ID given by the information provider in the New Column Name field.
8. If you use a proxy server to access an external web site, select the Ben PCP Server Proxy Set item and enter **true** in the New Column Name field.
   - If you do not use a proxy server, enter **false**.
9. If you use a proxy server, select the Ben PCP Server Proxy Port item and enter the port number (typically 80) in the New Column Name field.
10. If you use a proxy server, select the Ben PCP Proxy Host item and enter the URL of the proxy server in the New Column Name field.
11. Select the Ben PCP XML Version item and enter the version of XML you are using in the New Column Name field, such as 1.0
12. Select the Ben PCP Max Records item and enter the maximum number of records to be returned by the query in the New Column Name field.

    Note: For best performance, it is recommended that the maximum number of records be set to 100 or less.

13. Select the Ben PCP Request Method item and enter the HTTP request method expected by the information provider (such as GET or POST) in the New Column Name field.
14. Select the Ben PCP Show Label item and enter a message to display in the Result Table if the search returns no provider.
15. Select the Ben PCP Direction item and enter the text to display in the Map Column of the Result Table.
16. Select the Ben PCP Table Bar Text item and enter the text to display in the Result Table Bar.

Setting Up a Primary Care Provider Search without XML

Customers who create a search page which does not format the PCP query in XML can follow these guidelines for a creating a PCP search that is compatible with Self-Service Benefits.

To set up a primary care provider search without XML:

1. Navigate to the Primary Care Providers page from the Self-Service Benefits Enrollments menu.
2. Choose the Personalize Primary Care Provider Selection Table link.
3. Select a Personalization Level.
4. Choose the Advanced Settings button.
5. Select the Search item and enter the URL in the URL field that is accessed when a participant clicks the Search button on your custom Search web page.
6. A system administrator or application developer creates a search page that performs the query and accepts the following page-context variables:
   - PcpPersonId = (Person ID of the person for whom you are searching for a primary care provider)
   - PcpPlId = (Plan ID defined for the plan in the database)
   - PcpPlTypId = (Plan Type ID defined in the database)

     Note: You do not need to use these variables if they are not required for your search or validations.

7. If the search is canceled without a selection of a PCP, the following URL must be used to return to the search page:
   - /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE&akRegionApplicationId=805&pcpSearchCancel=1.

     Note: Replace the directory OA_HTML with the base HTML directory of your installation.

8. If the search is successful, the URL accessed by the query must return the following information (properly formatted) with the following parameter names and data types:

Parameter Name	Data	Value	Example
ExtIdent	ID of the primary care provider per the plan.	Number	10154244 (id)
PcpName	Name of the primary care provider	String	Sue Jones, MD (doctorsName)
PcpSpecialty	Specialties of the primary care provider	String	Internal Medicine, Pediatrics (specialty)
PcpPlId	The plan ID that corresponds to the plan name	Number	905 (planId)
PcpPersonId	The person ID passed to the database as part of the query	Number	928374655 (personId)
PcpTypCd	The code of the first primary care provider specialty that is returned by the query	Number	23 (pcpTypCd)

The URL returned by the search should look like this:

- /OA_HTML/OA.jsp?akRegionCode=BEN_PCP_SELECT_PAGE&akRegionApplicationId=805&ExtIdent=id&PcpName=doctorsName&PcpSpecialty=specialty&PcpPlId=planId&PcpPersonId=personId&PcpTypCd=pcpTypCd

  Note: Replace the directory OA_HTML with the base HTML directory of your installation and replace the variables in the URL with the actual values.

Self-Service Benefits Enrollments - US Federal

Federal Employee Health Benefits Overview

Federal government employees can elect, change, or cancel Federal Employee Health Benefits (FEHB). Employees and HR professionals can enroll and manage their FEHB benefits using self-service or the Standard Benefits professional user interface. The information entered in self-service is the same information needed to complete the SF-2809 (Health Benefits Election Form for Federal Employees).

> **Note:** As a consequence of this functionality, you no longer enter FEHB information when processing the RPA (the RPA health benefit extra information is disabled).

The application simplifies the process of determining health benefit eligibility through life events. With the exception of employees who waive the pre-tax deductions, federal employees can change their benefits selection only when a valid life event change occurs.

The Office of Personnel Management defines 13 life events that permit benefits enrollment or changes to benefit elections. Some life events result from RPA updates such as an Appointment action or Change in Duty Station personnel action.

Other life events result from the employee entering or changing his or her personal details, such as the addition of a dependent or change in primary address.

Some life events are not automated, such as when a family member loses coverage due to discontinuance of a FEHB plan. In these cases, the HR professional can initiate a life event for the employee.

When an employee enrolls or changes his or her health benefits, the application sends an FYI notification to the Personnel Office (POI) groupbox. The HR specialist can review the linked confirmation page and, if necessary, contact the employee to correct and resubmit the elections. If the employee does not have access to a computer, the HR specialist can transfer the data from the employee's SF-2809, or consult with the employee and then make the necessary elections through the professional user interface.

For further information about administering Federal Employee Benefits, refer to

For information about setting up the programs and plans used by federal health benefits, refer to Setting up FEHB, page 10-48 and Administering FEHB, page 10-38

Administering FEHB

You administer the US Federal Health Benefits and manage enrollment using Standard Benefits. Enrollment management is the process of registering your employees and their dependents FEHB plans and options.

Plan Eligibility

An employee's plan enrollment eligibility is based on work or residence location. Employees participating in Federal Employee Health Benefits may elect one of the predefined plans and options installed during the initial set up of FEHB. Employees may elect a plan that is specific to their state or county of residence, or a plan specific to their work location. (Overseas employees are only eligible for nationwide plans.)

If the employee's primary residence or duty station changes, the application detects the change and triggers a life event that permits the employee to change his or her benefit elections. The only exception occurs for in-state moves. For in-state moves, you must manually initiate a potential life event, such as a Change of Duty Station or Change in Primary Address.

> **Note:** For the application to detect a change in primary address, enter all employee addresses using the US or US global address style.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Viewing a Person's Life Event Information, *Compensation and Benefits Management Guide*

In some cases, it is necessary to override eligibility results. If this occurs, you can grant an exception so that an ineligible person can enroll in a plan or option. For example, if you extend an employee's Leave Without Pay (LWOP) beyond 365 days, the employee may become ineligible for FEHB, so you would grant an exception.

Conversely, you can waive an eligible person's participation in a plan. For example, if the OPM dropped a plan from a FEHB program, the employee could neither select nor remain with the plan. In that case, you could waive the person's participation in the plan so that he or she could enroll in another plan.

See: Overriding Eligibility Participation Information for a Person in a Program or Plan, *Compensation and Benefits Management Guide*

Enrollment Management

Electable benefit choices occur as a result of one of the OPM defined permissible life events. Live events are triggered through:

- RPA update: Request for Personnel action has been updated to the database.
- Manual changes: The employee initiates a change in self-service health benefits, or a personnelist changes data in either the Person window, Address window, or in the Non-Flex enrollment window.
- HR Manual: The personnelist initiates a potential life event through the professional user interface.

> **Note:** You cannot initiate these events through self-service, only through the professional interface.

The following table lists the life event triggers for the predefined OPM life events.

Life Event Code	Life Event	Life Event Triggers
1A	Initial Opportunity to Enroll	RPA (NOACs 100, 101, 107, 108, 115, 148, 150-171) The NTE Date must be greater than 365 days; or HR Manual
1B	Open Season	Manual
1C	Change in Family Status	Manual or HR Manual
1D	Change in Employment Status	RPA or Manual

Life Event Code	Life Event	Life Event Triggers
1D	Re-employment after a break in service of more than three days	RPA (NOACs 100, 101, 107, 108, 115,148,150-171) The NTE Date must be greater than 365 days; or HR Manual
1D	Return to pay status following loss of coverage due to expiration of 365 days of LWOP status of termination of coverage during LWOP	HR Manual
1D	Return to pay sufficient to make withholdings after termination of coverage during a period of insufficient pay	HR Manual
1D	Restoration to civilian position after servicing in uniformed services	RPA (NOACs 100-199) and LAC is QAK; or HR Manual
1D	Change from temporary appointment to appointment that entitles employee receipt of government contributions	RPA (NOACs 500-599) and HR Manual
1D	Change to or from part-time career employment	RPA (NOACs 781, 782, 702, 703, 721, 713, 500-599, 740, 741)
1E	Separation from Federal employment-employee or employee’s spouse pregnant	HR Manual
1F	Transfer from a post of duty within the US to a post of duty outside the US or reverse	RPA (NOACs 792, 702, 703, 721, 713, 500-599, 740, 741)
1G	Employee or eligible family member loses coverage under FEHB or another group plan	HR Manual
1H	Employee or eligible family member loses coverage due to the discontinuance, in whole or part, of a FEHB plan	Open Season or HR Manual
1I	Loss of coverage under a Federal group health plan because an employee moves out of the commuting area to accept another position and the employee’s non-federally employed spouse terminates employment to accompany the employee	HR Manual

Life Event Code	Life Event	Life Event Triggers
1J	Employee or covered family member in a Health Maintenance Organization moves or becomes employed outside the geographic area from which the carrier accepts enrollments, or if already outside the area, moves or becomes employed further from this area	HR Manual
1K	On becoming eligible for Medicare	HR Manual
1L	Temporary completes one year continuous service under (5 U.S.C. Section 8906a)	HR Manual
1M	Salary of temporary employee insufficient to make withholdings for plan in which enrolled	HR Manual

Manual Changes

Employees use benefits self-service to manually enroll and make changes to their benefits. A personnelist can manually initiate life events (HR Manual) for an employee, as well as enroll the employee or make changes to that person's benefit selections. HR Manual intervention is often required when:

- An employee does not have access to a computer
- The life event is not one that is automatically detected, such as an employee or eligible family member losing coverage under FEHB or another group plan.
- A Cancellation or Correction action requires that you back out a life event, for example, when you Cancel an Appointment and have to back out potential life events created for that person.
- For OPM reporting purposes, you need to select a ZZ health plan option

See: Enrolling Employees in Agency-Sponsored Health Plans, page 10-50

Two different windows enable you to make these changes. You use the Potential Life Event window to manually initiate, back out or void life events, and the Non-Flex Enrollment window to enroll and administer benefits for participants.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Viewing a Person's Life Event Information, *Compensation and Benefits Management Guide*, Enrolling a Person in a Non-Flex Program, *Compensation and Benefits Management Guide*

Effective Dates

The application determines the date on which a life event occurs based on the effective date or the user-entered date. The following table lists the source of the information used for the occurred on date.

Occurred On Source	Date Used
RPA action	RPA's effective date
Person window	Effective date of the data change, such as a change in marital status
Address window	From Date of the primary address
Self-Service benefits	RPA's effective date or the Occurred Date that the personnelist entered when the personnelist created the potential life event

Change in Family Status

A Change in Family Status can occur for many reasons, such as a marriage, divorce, legal separation, the birth or death of a family member, or a change in your home address. As a result, the Change in Family Status encompasses several sub-events:

- Change in Dependents: when you add, update, or delete a contact, the application generates a Change in Family Status. The reason that you might make a change in dependents is to record a birth or death of a family member.

  Note: You cannot delete a contact until you end-date that contact information in the Contact window.

- Change in Marital Status: when the employee changes his or her marital status in self-service or the personnelist changes the marital status in the professional user interface, the application generates a Change in Family Status life event
- Change in Primary Address: when an employee changes the state designation in the primary address or the personnelist makes the change through the professional user interface, the application generates a Change in Family Status life event.

Each time an employee makes a change in self-service that initiates one of these sub-events (Change in Dependents, Marital Status, or Primary Address), the application generates a corresponding Change in Family Status life event. The employee can then update his or her current benefit elections.

Similarly, a personnelist manually initiates a potential life event for one of the sub-events by initiating the parent life event such as a Change in Family Status in the Potential Life Events window. The personnelist can then make the necessary benefit changes in the Non-Flex Enrollment window or have the employee make the necessary changes in self-service.

Pre-Tax and After Tax Plan Options

The employee has the option upon initial enrollment to choose a plan with a pre-tax or after tax option. If an employee later wants to change from a pre-tax to an after tax option, the employee must wait until a valid life event occurs, such as Open Season or a

Change in Dependents. If the employee does not want to wait, he or she can contact the personnelist who can then process a potential life event (After Tax Deductions).

For employees on after tax deductions, no life event is required for the employee to:

- Terminate health benefits by declining coverage (pretax employees can only terminate coverage with a valid life event)
- Change to a lower option, for example change from Family to Self, or a High to Low option
- Change to pre-tax option

After the personnelist initiates an After Tax Deductions life event, the employee can choose to keep the current option level or change to a lower option.

Retroactive Actions

The application automatically enters the start and end dates for the election period based on the amount of time authorized by the OPM for each life event.

If you process a retroactive action in which the end date for election period has expired, the employee cannot make the changes through self-service. To extend the election period, the personnelist must change the end date, or close the event and initiate a new life event from the Life Events window.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Viewing a Person's Life Event Information, *Compensation and Benefits Management Guide*, Viewing Electable Choices for a Person Based on a Life Event, *Compensation and Benefits Management Guide*

Cancellations and Corrections

If you process a Cancellation or Correction action for an employee and the original RPA initiated a potential life event, you must void the life event if it is open. If the life event has closed, back out the life event, and if appropriate, process a new life event.

For example, if you Cancelled an updated Appointment action, and the Initial Opportunity to Enroll life event was subsequently detected, you would void the life event. As another example, if you Corrected an action, for example a Change in Duty Station, you would close the life event if it was still open, and then back it out.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Viewing a Person's Life Event Information, *Compensation and Benefits Management Guide*, Manually Voiding a Potential Life Event for a Person, *Compensation and Benefits Management Guide*

Thrift Savings Plan Overview

Federal government employees covered by the Federal Employee's Retirement System (FERS) and the Civil Service Retirement System (CSRS) can participate in Thrift Savings Plans and where eligible contribute to Thrift Savings Catch-up plans.

Employees and HR professionals can enroll and manage their TSP benefits using self-service or the Standard Benefits professional user interface. The information entered in self-service is the same information captured by the TSP Election Form (Form TSP-1) and TSP Catch-up Form (TSP 1-C) that the employees complete and forward to the Human Resources office. After saving theTSP information in the self-service or professional user interface, you can view the TSP elections in the Element Entries window.

As a consequence of this self-service functionality, you no longer enter TSP information when processing the RPA (the RPA US Fed Benefit Thrift Savings Plan extra information is disabled).

See: Thrift Savings Catch-Up Contributions, page 10-45

Eligibility

The application simplifies the process of determining TSP eligibility through life events. Examples of life events include Initial Opportunity to Enroll, Open Season, TSP Terminate Contribution, and Termination of Employment.

An employee can enter an amount or percentage per pay period or TSP contributions. The employee can enroll or change the contribution amount when the agency processes an Appointment action (new hire, rehire, and transfer).

During Open Season, employees can enroll, change, or terminate their contributions. Outside of Open Season, the personnelist can initiate a TSP Employee Terminated Contributions life event and then run the Participation Process:Life Event concurrent manager process to assign that person the Terminate Contributions option. The employee must then wait until the second open season to contribute again to TSP. When employees terminate their employment, the application automatically initiates a Termination of Employment life event to de-enroll them from TSP.

> **Note:** In the current release, for rehires and transfers the personnelist must use the override benefits functionality to reinstate the employee's TSP contributions. See:Overriding Eligibility Participation Information for a Person in a Program or Plan, *Compensation and Benefits Management Guide* and Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*

Coverage and Rate Start Dates

The coverage date is the date on which an employee makes an election or on which a life event such as a Termination of Employment occurs. The rate start date is the date on which that contribution actually begins.

For example, for a new hire, the coverage start date occurs when the employee makes the selection, and the rate start date, the first day of full pay period after the agency accepts the election form.

For an event, such as a Termination of Employment, the application de-enrolls the employee as of the Separation's effective date, and the rate end date recorded in the Element Entries is the Separation's effective date.

Notifications

When an employee enrolls or changes his or her TSP elections, the application sends an FYI notification to the Personnel Office (POI) groupbox. The personnelist can review the linked confirmation page and, if necessary, contact the employee to correct and resubmit the elections. If the employee does not have access to a computer, the personnelist can transfer the data from the employee's TSP-1 form, or consult with the employee and then make the necessary elections through the professional user interface.

See: FYI Notifications, page 10-48

Manual Changes

Employees use benefits self-service to manually enroll and make changes to their TSP contributions. A personnelist can manually initiate life events for an employee, as well as enroll the employee or make changes to that person's TSP selections. The personnelist's manual intervention is often required when:

- An employee does not have access to a computer
- A Cancellation or Correction action requires that the personnelist back out a life event

The personnelist uses the Potential Life Event window to manually initiate, back out or void life events, and the Non-Flex Enrollment window to enroll and administer benefits for participants.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Overriding Eligibility Participation Information for a Person in a Program or Plan, *Compensation and Benefits Management Guide*, Enrolling a Person in a Non-Flex Program, *Compensation and Benefits Management Guide*

Cancellations and Corrections

As a personnelist, if you process a Cancellation or Correction action for an employee and the original RPA initiated potential life events, you must void the open life events, or if they are closed, back them out and if appropriate, process new life events.

For example, if you Cancel an updated Appointment action, you would void the Initial Opportunity to Enroll life event.

See: Manually Creating a Potential Life Event for a Person, *Compensation and Benefits Management Guide*, Viewing a Person's Life Event Information, *Compensation and Benefits Management Guide*, Viewing Electable Choices for a Person Based on a Life Event, *Compensation and Benefits Management Guide*, Manually Voiding a Potential Life Event for a Person, *Compensation and Benefits Management Guide*

Thrift Savings Catch-Up Contributions

After enrolling in Thrift Savings Plan (TSP), eligible TSP participants can make tax-deferred catch-up contributions from their basic pay up to the maximum allowable amount. TSP participants qualify if they have an Active Assignment Status, have attained 50 years of age or will attain 50 years of age in the same calendar year, and are contributing the maximum amount to TSP. An employee's TSP Catch-Up contribution is made in whole dollar amounts and begins the first full pay period after the agency accepts the employee's TSP Catch-up election form.

The Federal Thrift Savings Plan Catch-Up is an unrestricted life event, so employees can enroll, change or terminate their contributions at any time during the year. When an employee uses self-service, the employee must enroll first in TSP, and then exit the self-service application and re-open it to enroll in TSP Catch-Up. For example, for an Initial Opportunity to Enroll, the employee on entering self-service would have an opportunity to enroll in FEHB and TSP. After enrolling in FEHB and TSP and exiting the application, if the employee qualified for TSP Catch-Up, the next time the employee opened the application, the employee's benefit enrollment opportunities would include FEHB, TSP, and TSP Catch-Up. During the remaining enrollment period, the employee could enroll in TSP Catch-Up and continue to change his or her elections until the end of the enrollment period. The employee's entered TSP Catch-Up amount represents the amount that the employee contributes each pay period, not an annual total contribution amount.

If the employee does not have access to a computer or other circumstances require your intervention as HR specialist, you can manage the TSP benefits for the employee through the professional user interface, using the Person Life window.

TSP Catch-Up contributions automatically terminate at the end of the calendar year. If the employee wishes to continue contributing to TSP Catch-Up, the employee must enroll again in the new calendar year. To ensure that all employees are de-enrolled from TSP Catch-Up, you run the Participation Process:Selection concurrent manager process. By setting this process to run daily, the application automatically de-enrolls employees who have chosen to terminate their catch-up contributions. At the year's end, the application de-enrolls employees from TSP Catch-Up who have no future-dated enrollments.

See: Setting up TSP and TSP Catch-Up, page 10-50

Setting Up User Access to Self-Service Benefits

Self-Service Benefits functions are attached to the Benefits Self-Service menu. You can change menu names and function names, or remove menus and functions if required.

As a standard practice, you should copy and edit all delivered menus you want to update. Otherwise, your changes will be overwritten the next time you apply a patch to the application.

See: Configuring Tabbed Regions, page 5-21

See: User's Menu *(Oracle Applications System Administrator's Guide)* for more information on configuring menus.

To set up user access to self-service benefits:

1. Log on to Oracle HRMS with the System Administrator responsibility.
2. Open the Menus window.
3. Query the Self-Service Menu in the Menu field: HR_EMPLOYEE_DIRECT_ACCESS_WEB. The following Self-Service User Menu Name displays to users:
   - Employee Self-Service V4.0

   You can change the menu name if required.
4. Query the Benefits Submenu in the Menu field: BEN_SELF_SERVICE_BENEFITS. The following Benefits Submenu User Name displays:
   - Benefits Self Service

   Because the Benefits Self Service submenu is not linked to a top level menu (it has no prompt) the submenu is hidden. The Benefits Self Service submenu has the following prompts.
   - Benefits Enrollment
   - Current Benefits

   These prompts function as the labels on the tabs of the self-service web page.
5. Save your work.

6. Add a new row for the US Federal benefits function.
7. Enter a sequence number.
8. Enter a prompt, such as US Federal HR Benefits.
9. Choose the Self-Service Benefits Enrollment - Federal function, (GHR_SS_BNFT_ENRT).
10. Save your work and close the Menus window.
11. You can use the Form Functions window to customize the predefined functions--GHR_SS_BNFT_ENRT.
12. Use the Form Functions window to create your own Self-Service Benefit functions from the sample functions supplied. The sample User Function Names are:
    - Self Service View Current Benefits
    - Self Service Benefits Enrollment

    The Function Names are:
    - BEN_SS_CURR_BNFT
    - GHR_SS_BNFT_ENRT

    If you update the predefined functions, you must update your custom function to use the predefined parameters and HTML Calls.

    > **Note:** It is a good practice to check the Readme for each Self-Service Benefits patch you apply to see if the parameters and HTML Calls for the predefined functions have changed.

    See: Form Functions Window *(Oracle Applications System Administrator's Guide)*
13. Set Security Profiles. Use the System Profile Values window to link the responsibility you have created to a Security Profile and your Business Group. The Security Profile is:
    - HR: Security Profile

    > **Note:** If you fail to link your Responsibility to your Business group with the HR: Security Profile, any benefits participants who attempt to enroll will receive an error message indicating they cannot enroll.

    See: User Profiles (*Oracle Applications User's Guide* and *Oracle Applications System Administrator's Guide*)
14. Set the HR: Business Group Profile. Use the System Profile Values window to link the responsibility you have created to your Business Group. The Business Group Profile is:
    - HR: Business Group
15. Define the people you would like to access Self-Service Benefits.

    There are two ways to do this. You can follow the typical steps for defining a new user and assign each user a responsibility that enables access to Self-Service Benefits, one at a time.

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

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

See the White Paper titled: *Batch Creation of User Accounts*, available from MetaLink.

Enabling US Federal Benefits FYI Notifications

As a general practice, most federal personnel offices approve a participant's benefits elections, such as health benefit and TSP selections. After an employee completes the enrollment or updates to their benefit elections, Oracle workflow sends a notification to the POI groupbox. The notification contains a link to the employee's confirmation page. After reviewing the elections, the personnelist may then contact the participant to correct and resubmit the elections or manually override the changes in the professional user interface.

If your agency's policies do not include this review or approval process, you can prevent the receipt of the FYI notification by changing the function parameters.

Use the Function window and the system administrator responsibility to change the FYI notification setting.

To not have the POI groupbox receive the fyi notification:

1. Click the Forms tab.
2. Query the function GHR_SS_BNFT_ENRT
3. Navigate to the Parameters field and change the send Notification parameter from Y to N. The entire parameter should read:

   displayDate=N&allowEnrt=Y&sessionDate=&sendFYINotification=N&wf ProcessName=GHR_FYI_Notification_PRC
4. Save the form function.
5. Repeat the steps for each function that you want to change.

Setting up FEHB

Before the employees or human resource personnel can access self-service benefits through the self-service user interface or the professional forms interface, you must set up FEHB.

> **Note:** Do not add or update life events associated to the predefined FEHB program and plan enrollment requirements.

To set up US Federal Employee Health Benefits:

1. Run the Populate FEHB Program and Plan Design concurrent manager program for each business group.

   See: Running the Populate FEHB Program and Design Plan Process, page 10-49
2. Compile the FEHB fast formulas for each business group.

   See: Compiling FEHB Fast Formulas, page 10-49
3. Set up user access.

   See: Set Up User Access to Self-Service Benefits, page 10-46
4. Set up notifications.

When an employee has selected their benefits, the application notifies the Personnel Office groupbox. If you do not want the POI groupbox to receive these notifications, you can deselect this option as explained in . Setting up FYI Notifications, page 10-48

Running the Populate FEHB Program and Design Plan Process

Before you can access the predefined programs and plans for Federal Employee Health Benefits, you must run a concurrent manager process that installs this data.

Use the Submit Processes and Reports window.

To run the Populate FEHB Program and Design Plan Process:

1. In the Name field, choose Populate FEHB Program and Design Plan from the list of values.
2. Click in the Parameters field to open the Parameters window. Choose the Business Group Name from the list of values.
3. Choose the Submit button.
4. Repeat these steps for each business group that you have set up.

What's Next

See: Compiling FEHB Fast Formulas, page 10-49

Compiling FEHB Fast Formulas

After you populate the Federal Employee Health Benefit plans and programs for each business group, you must compile the fast formulas for the same business groups.

See: Running the Populate FEHB Program and Design Plan Process, page 10-49

Use the Submit Requests and Processes window.

To compile individual formulas:

1. In the Name field, choose Compile Formula.
2. In the Parameters window, choose the formula type and formula name.
   - Formal Type: Extra Input
   - Formula Names: FEHB_GET_PLAN_OPTION_SHORT_CODE
3. Choose the Submit button.
4. Repeat these steps, substituting the following parameter information for the remaining fast formulas.

Formula Type	Formula Name
Person Change Causes Life Event	GHR_CONT_LER_TRIGGER
Person Change Causes Life Event	GHR_ADDRESS_LER_TRIGGER
Person Changes Causes Life Event	GHR_MARI_STATUS_LER_TRIGGER
Participation and Rate Eligibility	FEHB_PLAN_ELIGIBILITY

Enrolling Employees in Agency Sponsored Health Plans

Personnelists can enroll employees in agency-sponsored health plans that are not part of the Office of Personnel Management administered Federal Employees' Health Benefits program. The code reserved for these health plans is ZZ.

Personnelists can manually assign the employee to a ZZ health plan by entering one of the following options in the employee's health benefits elements:

- W Agency sponsored health plan
- X Pending where the employee is eligible for coverage but has not elected it
- Z Not eligible for Federal employee health benefits

Note: There is not a separate option for 'Y' since this option is already present both in self-service and forms as Declined Coverage.

After you enroll an employee in a ZZ health plan option, the employee is eligible for other life events and can select a different plan. For example, during Open Season, an employee on an agency-sponsored health plan could choose a non-agency health benefit plan. When the application updates the employee's selections, it updates the values stored in the health benefits elements entries.

To enroll an employee in an agency health plan:

1. If the employee is currently enrolled in an existing FEHB plan, de-enroll the person from that FEHB plan.

   See: Manually Delete an Enrollment, *Oracle HRMS Compensation and Benefits Management Guide*

2. Navigate to the employee's element entry window.
3. Specify the appropriate plan in Health Benefits or Health Benefits Pre Tax segment.
4. Save your work.

If the employee later chooses to de-enroll in the agency plan, and enroll in a non-agency plan, the employee can enroll in the non-agency plan when a life event occurs, such as Open Season. The application replaces the employee's former selection in the element record with the new selection.

Setting up TSP and TSP Catch-Up

Before the employees or human resource personnel can access self-service benefits through the self-service user interface or the forms interface, you must populate the

TSP and TSP Catch-Up plans and programs and then migrate the employees who are currently contributing to TSP.

> **Note:** Complete each concurrent process before proceeding to the next step.

To Set Up TSP and TSP Catch-up:

1. Run the Populate TSP program and plan design concurrent manager program for each business group.

   See: Running the Populate TSP Program and Plan Design Process, page 10-52

2. Run the Populate TSP Catch-Up program and plan design concurrent manager program for each business group.

   See:

   Running the Populate TSP Program and Plan Design Process, page 10-52

3. Compile the TSP fast formulas for each business group.

   See: Compiling TSP and TSP Catch-Up Fast Formulas, page 10-52

4. Compile the TSP Catch Up fast formulas for each business group.

   See: Compiling TSP and TSP Catch-Up Fast Formulas, page 10-52

5. Schedule the Participation Process:Selection concurrent manager process to run daily to check the eligibility of employees for TSP Catch-Up.

   > **Important:** To enhance performance, run the process *only* for the Federal Thrift Savings Plan (TSP) Catch Up Contributions. To ensure the process updates the records, choose Commit for the Validation segment. See:Running the Participation Batch Process, *Compensation and Benefits Management Guide*

   The process de-enrolls employees at the end of the calendar year if they have no future-dated enrollments, and during the year nrolls employees who have selected the Terminate Contribution option.

6. Set up user access.

   See: Set Up User Access to Self-Service Benefits, page 10-46

7. Set up FYI Notifications

   When an employee has selected their benefits, the application notifies the Personnel Office groupbox. If you do not want the POI groupbox to receive these notifications, you can deselect this option as explained in Setting up FYI Notifications, page 10-48

8. Migrate TSP employees currently contributing to TSP to the Benefits model.

   See: Migrating TSP and TSP Catch-Up, page 10-53

9. Migrate TSP Catch-Up employees currently contributing to TSP to the Benefits model.

   See: Migrating TSP and TSP Catch-Up, page 10-53

Populating TSP and TSP Catch-Up Programs and Plans

Before you can access the predefined programs and plans for TSP and TSP Catch-Up, you must run the concurrent manager processes that install this data.

Use the Submit Processes and Reports window.

To run the Populate TSP Program and Design Plan Process:

1. In the Name field, choose Populate TSP Program and Design Plan from the list of values.
2. Choose the Submit button.
3. Repeat these steps for each business group that you have set up.

To run the Populate TSP Catch-Up Program and Design Plan Process:

1. In the Name field, choose Populate TSP Catch-Up Program and Design Plan from the list of values.
2. Choose the Submit button.
3. Repeat these steps for each business group that you have set up.

What's Next

See: Compiling TSP and TSP Catch-Up Fast Formulas, page 10-52

Compiling TSP and TSP Catch-Up Fast Formulas

After you populate the TSP and TSP Catch-Up plans and programs for each business group, you must compile the fast formulas for the same business groups.

See: Running the Populate TSP Program and Plan Design Process, page 10-52

Use the Submit Requests and Processes window.

To compile individual formulas:

1. In the Name field, choose Compile Formula.
2. In the Parameters window, choose the formula type and formula name.
   - Formal Type: Participation and Rate Eligibility
   - Formula Names: GHR_EMP_TSP_ELIGIBILITY
3. Choose the Submit button.
4. Repeat these steps, substituting the following parameter information for the remaining fast formulas.

Formula Type	Formula Name
Rate Start Date	GHR_TSP_OS_RATE_STRT_DT
Extra Input	GHR_TSP_STATUS
Postelection Edit	GHR_VERIFY_TSP_AMOUNT
Postelection Edit	GHR_VERIFY_TSP_PERCENT
Participation and Rate Eligibility	GHR_EMP_TSP_CATCHUP_ELIGIBILITY
Enrollment Opportunity	GHR_TSP_PLAN_ELECTABLE

Migrating TSP and TSP Catch-Up Information

After you populate the Thrift Savings Plan and Thrift Savings Plan Catch-Up plans, you must convert the existing records for employees participating in TSP and TSP Catch-Up to the Federal Benefits model. After the conversion, the element Start Date is the date that appears for the benefits Coverage and Rate Start Dates.

Use the Submit Processes and Reports window.

> **Note:** The process runs against the business group of your login's responsibility.

To migrate employees to TSP plans:

1. In the Name field, choose Federal Benefits - TSP Conversion of Benefits from the list of values.
2. Choose the Submit button.
3. Repeat these steps for each business group.

To migrate employees to TSP Catch-Up plans:

1. In the Name field, choose Federal Benefits - TSP Catch Up Conversion of Benefits from the list of values.
2. Choose the Submit button.
3. Repeat these steps for each business group.

If there is a problem in migrating an employee's record, the application enters the error information in the Federal Process Log.

Compensation Workbench

Compensation Workbench

For a full functional description of the Compensation Workbench, see: Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*.

Menu and Function Names

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

User Menu Name	Function Name
Manager Self-Service	Compensation Workbench

Workflow

Not applicable

Configurable Tips and Instructions

Not applicable.

Configurable FlexFields

Descriptive Flexfields display on their own flexfield worksheet group subtab within the worksheet.

Table Name	Name	Title
BEN_PIL_ELCTBL_CHC_POPL	BEN_PIL_ELCTBL_CHC_POPL	Additional Ben Pil Elctbl Chc Popl Details

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Not applicable.

Compensation Workbench Budget Preparation

You can define a budget at the top level of an organization hierarchy. A high-level manager issues distribution budgets to managers who have direct reports who are also managers.

The budget provides a variety of information, such as the available amount to budget, the amount used, and any amount reserved for future use that is not issued to reporting managers.

You can define a budget using monetary amounts or percentages of eligible salaries. A manager can determine a reporting manager's budget manually or by using the Allocation Wizard.

During plan design, you determine how changes to a lower-level manager's list of employees affect a budget. You can choose to maintain fixed amounts or to recalculate the budget based on a percentage.

Reporting managers receive Workflow notifications automatically when a higher-level manager issues a budget.

Budget Issuance

To begin the budgeting process, a compensation manager does one of the following:

- Uses the Person Life Events window - located in the professional user interface - to issue a budget to a high-level manager who issues budgets to other managers.
- Sets up the compensation plan so that a predefined budget is auto-issued to the Worksheet for all managers when you run the Participation Process: Compensation.

Auto-issuing budgets gives the compensation professional control over the amount a manager can allocate to reporting employees and creates a uniform compensation distribution across the enterprise.

Typically, you base auto-issued budgets on a flat percentage. You can set up variable rate profiles to vary the available percent based on a variety of eligibility criteria.

See: Defining Enrollment Requirements for Compensation Workbench Plans, page 10-82

The Allocation Wizard

The Allocation Wizard provides a variety of calculation types that automatically calculate the budget for one or more selected managers. Helpful tips located in Compensation Workbench self-service interface explain the features of each calculation type.

Budget and Worksheet Rounding

You can enter an amount or percent without it being automatically rounded. Rounding codes you enter on the worksheet and budget sheet apply to the amount, and not the percent, of the new salary. The application recalculates the percent and new salary after obtaining the rounded amount.

The professional user can also omit the rounding codes for rates so amounts are always rounded using the same rounding rules as the plan currency.

Budget and Allocation Matrix

The Distribution Method of Distribute Based on Criteria is available through the Allocation Wizard for calculating budget/worksheet amounts. A line manager can set or revise the budget or worksheet allocations based on common employee criteria such as job, grade, performance rating, and so forth.

Managers can save a Matrix definition for later use. You may also choose the Revert Matrix Criteria button to refresh the matrix and select new criteria. You can choose to recall a previously saved matrix by choosing Recall Saved Criteria Matrix, or create a new matrix with varying row and column criteria.

You can allocate by Average Amount per Employee or Percent of Eligible Salary. Allocating based on an Average Amount per Employee, you can define a matrix for Stock Option Plans or other non-monetary amounts.

Matrix Dimensions Options

Managers can set criteria for one of two types of matrices, Single Dimensional (One Criteria), and Two Dimensional (Two Criteria).

Single-Dimensional Matrices

For single-dimensional matrix, you select row criteria. After you apply the criteria, the Calculation Details page displays a single dimensional table with all the unique values of the selected criteria as row headers for the selected employees.

Matrix by Percent of Eligible Salary:

If you are defining a single dimensional matrix for Percent of Eligible Salary, the matrix refreshes with the number of employees, eligible salary, percent of eligible salary and totals. Here, after entering the percent of eligible salary, you can view the totals by choosing the Recalculate button.

Matrix by Average Amount per Employee:

If you are defining a single dimensional matrix for Average Amount per Employee, the matrix refreshes with the number of employees, eligible salary, percent of eligible salary, average amount per employee, and totals. Here, after entering the average amount, you can view the totals by choosing the Recalculate button.

Two-Dimensional Matrices

For a two-dimensional matrix, you select criteria for rows and columns. After you apply the criteria, the Calculation Details page displays a two-dimensional table with all the unique values of the selected criteria as row and headers for the selected employees.

Matrix by Percent of Eligible Salary:

If you are defining a two dimensional matrix for percent of eligible salary, the matrix refreshes with the rows and column of the selected criteria, and with the number of employees, total eligible salaries, percent of eligible salary and totals. Here, after entering the percent of eligible salary, you can view the totals by choosing the Recalculate button.

Matrix by Average Amount per Employee:

If you are defining a two dimensional matrix for average amount per employee, the matrix refreshes with the tows and columns of the selected criteria, and with the number of employees, total eligible salaries, average amount per employee, and totals. Here, after entering the percent of eligible salary, you can view the totals by choosing the Recalculate button.

Additional Matrix Features

Various other features on the Matrix include:

- Show/Hide - you can show details to display the two numbers under each cell, number of employees and total eligible salaries for the number of employee

- Legend - illustrates what the numbers under each enterable cell represent - the number of employees that meet the criteria, and the total eligible salaries of the employees who meet the criteria.

Compensation Workbench Allocations

A line manager uses the Allocations tab on the worksheet to allocate compensation to any eligible employee at a lower level in the reporting hierarchy. As with budgets, a line manager can use the allocation wizard to help determine compensation awards.

> **Note:** Line managers cannot allocate their own compensation.

The worksheet displays a variety of information about an employee that a manager can view to help determine an allocation. You can define a plan so that a manager can view historical information about compensation awarded to an employee.

Choose the Show icon on the Allocations Table to display the detail region. The data in the detail region shows the manager detailed information about the employee, such as personal information, work information, and recent compensation awards.

See: Employee Eligibility for Compensation Workbench, page 10-60

Compensation Workbench Itemization

You can itemize a compensation plan into components so that your line managers budget and allocate compensation for discrete factors, such as Merit or Cost of Living. Itemization provides for a focused approach to adminstering salary increases and awards.

You can link a compensation component to a salary component. At the end of a salary review cycle, you run the Compensation Workbench Post Process to update salary components with the new values stored by the compensation components.

A component is equivalent to an option in the Total Compensation data model. After you set up your components using the Options window, you link the options to the compensation plan.

Here are some guidelines to consider if you itemize your plan:

- You should attach two or more components to the plan.
- If you budget, you must budget for at least one component, but you are not required to budget for each component in the plan.
- Coordinate your activity rates so that you record rates for the component, rather than the plan.

Compensation Workbench Promotions

Depending on your company’s business needs, compensation plans may be designed to allow managers to change an eligible employee’s job or promote the employee during the same cycle that salary, bonus, or stock is awarded - or a separate promotions plan may be created to enable managers to change an employee’s job or promote as a separate and distinct action.

Compensation Workbench Promotions provides managers with a complete list of eligible employees to promote (and to award compensation) that will help them select the best people to promote and to maintain equity and fairness within the manager's organization.

Using Self-Service, managers can assign a new job, position, or grade, or change the Assignment Descriptive Flexfield or soft-coded Legislative Flexfield for any employee in their reporting structure. Employees with an appropriate security access can also record promotions using the Switch Manager.

Managers can also change some employee details directly, depending on which fields are available to them. You can configure the Worksheet Group using Personalization and select the columns that managers may view and update. For instance, if you use Personalization, you may allow managers to update the Job, but not the Position, then the self-service page will display Old Job and New Job, but not Old Position, New Position. The Old value will always show data as of the effective date. New data will show only if it has been changed.

You can make the following available using Personalization for update using Compensation Workbench:

- Assignment Change Reason

  Note: This indicates the reason that a promotion or job change has occurred.

- New Job
- New Position
- New Grade

You can view the following information while Promoting an employee:

- Employee Name
- Employee Full Name
- Old Job
- Old Position
- Old Grade

See: Switch Manager, page 10-62

See: Employee Eligibility for Compensation Workbench, page 10-60

Processing the Promotion

Once you complete the worksheet, you route it for approval. The application maintains the changes in a temporary state--until approved--and the changes are visible only in the managers' self-service view of Compensation Workbench.

If the higher-level manager approves the worksheet, then all the changes are approved. You cannot approve some changes and not others. Upon approval, you run a post-process that updates all new or changed HRMS data.

Once the worksheet is approved, you run a post process, which updates the employee's assignment record to reflect the approved job changes and/or promotion.

Compensation Plan Design

There are different ways to design your Compensation Plan to take advantage of Compensation Workbench features, each with its own benefits.

You can:

- Create a plan that allows managers to make job changes and promotions at the same time that compensation is awarded.

  This plan speeds up the annual review process because all changes that affect a person's compensation can be submitted, reviewed, and approved at once. This helps managers award compensation to employees in the position, job, or grade equitably, and reduces the amount of plan design setup required.

- Create a plan that only allows managers to process job changes and promotions.

  This allows you to schedule a compensation period after all job changes / promotions are given. This is helpful when compensation limits or recommendations are based on an employee's assignment information.

Modifying an Existing Plan

You can modify an existing compensation plan to allow for jobs changes and / or promotions.

If you add the Job Change/Promotions Worksheet group to an existing plan, and the allocations have been approved and the Post Process has run, and you only select the Job Changes/Promotions worksheet to display, then managers will only be able to see the Job Changes/Promotions worksheet group. The previously made allocations will be stored, though hidden from view.

If you add the Job Changes/Promotions worksheet group to an existing plan and allocations have not yet been approved or submitted, and managers are allowed to allocate compensation, then both the Job Changes/Promotions and Compensation Worksheet groups should be added to the Plan Definition window.

> **Note:** Changing the worksheet groups after the Participation Process runs does not require rerunning the Participation Process.

Compensation Workbench Employee Performance Rating

Employee Performance Rating allows managers to rate and rank any eligible employee in their reporting structure. Employees with the appropriate security access can also rate employees using the Switch Manager.

Compensation Workbench allows managers to see all of their employees in a single view. Because managers can see each employee in relationship to others, the process of rating employee performance should be more fair and objective.

Managers can view their employees' last performance ranking and then assign them a new one.

You can complete your employee ratings and ranking before or during a promotions or compensation cycle, depending on how your business operates, and this will dictate your plan design and setup.

You can configure the Worksheet Group using Personalization and select the columns that managers may view and update.

Depending upon Personalization, managers can view and update information regarding the employee, as follows:

- Rank
- Rating

Additionally, you can view the following information while ranking an employee for performance:

- Employee’s Name
- Employee’s Full Name
- Number of Years Employed
- Total Ranked

  Note: This is the total ranked by the current manager.

- Other’s Rank

  Note: This is the rank of the employee given by the line manager, and only displayed to the manager approving the worksheet.

- Rating Type

  Note: Rating is a List of Values can can be updated at your site.

- Previous Rating Date

The worksheet has to be approved as a whole.

Once a manager completes the worksheet, it is sent for approval. The system maintains the changes in a temporary state-- until approved-- and changes are visible only in the managers’ Self Service view from Compensation Workbench.

If the worksheet is approved, then all the changes are approved. You cannot approve some changes and not others. Upon approval, you run a post process that updates all HRMS data regarding these changes.

Employee Eligibility for Compensation Workbench

A manager can view employee details for his or her direct report--and any eligible employee farther down in the reporting hierarchy--in Compensation Workbench.

When you set up your Compensation Workbench plan in Oracle HRMS, you can define participant eligibility profiles to determine if an employee is eligible to receive an award, a promotion, or even a performance evaluation. A compensation administrator can override eligibility results in the professional user interface.

Additionally, a compensation administrator can move an employee from one manager’s worksheet to another manager’s worksheet.

See: Employee Reassignment for Compensation Workbench, page 10-61

View and Update Employee Eligibility

Managers can update employee eligibility when they have "update access" to their own worksheet. Managers can update employee eligibility for all direct report employees and employees assigned to their worksheet for the selected compensation plan.

To give a manager update access to their worksheets, select Updateable in the Worksheet Access field on the Person Life Events window for each manager.

The employee eligibility page displays the ineligibility reason for employees ineligible for the plan. In addition, if eligibility has been overridden in the past, the person who did the override and the date of action displays. However, updates to an employee's eligibility may not be made after the worksheet has been submitted for approval, or if another manager has submitted an eligibility change.

Managers without update access may only view employee eligibility for all direct report employees and employees assigned to their worksheet for the selected compensation plan. Managers can view eligibility when the session date is within the availability period defined for the plan and enrollment period, and there is at least one eligible employee in the manager's worksheet for the plan.

Employee Reassignment for Compensation Workbench

Employee Reassignment provides managers a facility to add employees to their worksheets as well as assign employees to other managers' worksheets. The employee reassignment is valid for the selected compensation plan and enrollment period, and does not affect the current supervisor relationship.

Employee Reassignment enables managers to award a bonus or other type of compensation to an employee who does not report to them, but who may have performed some task for the manager that warrants compensation. Employee Reassignment also enables managers to cover for one another when absent during a compensation award period.

Employee Reassignment uses supervisor or position hierarchy to determine required approvals and the subsequent approver in the approval chain. The approver may approve or reject the employee reassignment. Compensation Workbench includes two default approval and notification workflows.

Reassigning an Employee

You navigate to the Select Employees to Reassign page by choosing Employee Reassignment under the Worksheet tab. You can search for a Worksheet Manager, or an Employee Name. The search results display in the lower region of the page, listing the Employee Name, Employee Number, Job, Worksheet Manager, and Supervisor. Here, you can choose those employees you wish to reassign, or view pending details.

The employee's earlier assignment is in pending status if a clock icon displays next to an employee's name. You cannot reassign an employee who is in a pending status. However, you can view the pending details for the employee by clicking the icon, which displays the Pending Details page for the employee. This page shows the Pending Worksheet Manager name, the Requestor Name, Requested Date, and the name of the Next Approver.

If you click the Reassign button, a page displays where you can enter the new manager's name. Click Next to review the employees to be reassigned. On the Review page, you can enter comments for the current and or proposed worksheet managers. After you review the employees you wish to reassign and enter any comments, you can submit your request. A page displays to confirm your request.

Changes on the manager's worksheet may require approval before they appear on the new manager's worksheet. The approval process and notifications use Workflow/AME. There are three terms used for each approval process:

- Party 1 is the manager whose worksheet is losing the employee
- Party 2 is the manager whose worksheet gains the employee
- Requestor is the person who requests the reassignment. The requestor may or may not be one of the two parties.

The three delivered approvals are:

- Approval 1: Party 1 is a single approver in which the approver is Party 1. Party 1 can Approve or Reject the request.
- Approval 2: Party 2 is a single approver in which the approver is Party 2. Party 2 can Approve or Reject the request.
- Approval 3: Party 3 is No approver necessary.

Party 1 and Party 2 receive notifications to inform them about a change of worksheet manager if approval is not required.

Party 1 and Party 2 receive notifications to inform them that a reassignment request has been submitted for approval if approval is required.

Party 1, Party 2, and the requestor receive approval notifications. Rejection notifications are only sent to the requestor.

When you receive the notification of pending employee reassignment, you can view all the details, and either approve, reject, or reassign. This will initiate the approval and notification process again.

Switch Manager

You can access Switch Manager from the Compensation Workbench Bench home page. You can search for a specific manager, switch to a recently selected manager, or switch back to your original identity.

The Switch Manager allows users to switch their identity to any of the worksheet managers available under their security view. Using this feature, you can quickly act as another manager within your security profile, and view or make updates to another manager's worksheet without drilling down within the worksheet. Compensation professionals use Switch Manager to act as a Super-User.

Compensation Workbench is delivered with Switch Manager enabled for the HR Professional responsibility. A system administrator can disable Switch Manager, if necessary.

To disable Switch Manager, open the Form Functions window and query Compensation Workbench Home for Administrators in the User Function Name field. Choose the Web HTML tab to display the following HTML Call:

OA.jsp?akRegionCode=BEN_CWB_HOME_PAGE&akRegionApplicationId=805&
displayDate=N&displaySwitchManager=Y

Change displaySwitchManger=Y to displaySwitchManger=N to prevent anyone using a responsibility with this menu and function from having access to the Switch Manager on the Compensation Workbench home page.

Switch Manager Search Page

If a manager does not appear in your poplist, you can search for a manager using the Switch Manager Search page. This allows you to search for managers based on various search options such as:

- Employee Name
- Employee Number
- Email Address

The Results region of the search page returns all managers that meet the search criteria entered. You click on the manager's name to initiate the Switch Manager functionality.

Compensation Workbench Approvals and Notifications

When done, the manager submits the worksheet and Oracle HRMS routes it for approval based on position or supervisor hierarchy (as defined in the enrollment requirements for the compensation plan).

If you require worksheet approval, the Self-Service workflow process assigns a submitted worksheet a status of Pending Approval and routes a notification to each approver through a configurable notification hierarchy.

All information is considered part of one worksheet once a manager submits the worksheet for approval. All job changes and promotions must be approved or rejected together. However, the approving manager can drill down to a lower level manager's worksheet and make changes to it before approving the worksheet and sending it to the next level for approval.

Notifications on the Home Page

Managers can see a snapshot of their five most recent, open Compensation Workbench notifications on their Compensation Workbench home page. You can view the complete details of any of the five notifications by clicking on the subject. If more than five notifications exist, you can choose to view the full list of open notifications by choosing Full List.

If you choose the subject of any notification, the details page displays where you can view the subject of the email notification, the date the mail was sent, the manager's full name, complete details about the mail, and a response section indicating if a response is required, plus room for a response.

Managers are able to close notifications from this page, removing the notifications from the notifications list. To close a notification, choose the Close button within the Response region.

If the manager logging into Compensation Workbench has the Switch Manager ability and switches to a different manager, the other manager's notifications are not displayed.

See: Switch Manager, page 10-62

Standard Activity Rates for Compensation Workbench

You can define standard rates to meet a variety of business needs for a Compensation Workbench plan. Most rates display fixed or enterable amounts that appear as columns in the self-service interface. You can also base a rate on a multiple of compensation that uses a derived compensation factor you have defined.

The rates can allow input from a manager--to complete a distribution--or provide guidance for a manager's decision-making.

The **activity type** you select when you define a standard rate determines how and where Compensation Workbench uses the rate.

You can use System Extract to extract Compensation Workbench rates for transfer to a third party, including eligible and enrolled rates.

See below for a description of activity types that have specific functions for Compensation Workbench.

Standard Rate Activity Types

CWB Worksheet Amount

This activity type stores a manager's worksheet allocations for an employee in money or shares. This is an employee's award amount.

For bonuses and stock options, you attach an element and input value to this standard rate to pass the allocation to payroll. Check the Assign on Enrollment field so that the Compensation Workbench Post Process can write the element entry (for bonus and stock plans) or update the person's salary amount (for salary plans) and salary element. For salary updates, do not attach an element to this rate.

Required?	Required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Checked
Enter Value at Enrollment Recommendation	Checked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank or Shares
Attach elements?	Yes

CWB Distribution Budget

This activity type stores the budget amount or percent of eligible salaries issued by a high-level manager to another manager.

If you auto-issue budgets, define the Distribution Budget rate so that it is equal to the Worksheet Budget rate. Leave the Enter Value at Enrollment and Enter Annual Value fields unchecked. Enter the auto-issue percent or amount in the Flat Amount field.

Use the Preserve Budget Column field on the Plan Enrollment Requirements window to set whether the application stores budgets as amounts or percents.

Required?	Required if budgeting
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Checked (Unchecked for auto-issued budgets)
Override Recommendation	Checked
Unit of Measure Recommendation	Shares of Blank if monetary
Attach elements?	No

CWB Worksheet Budget

The total monetary or share amount available to a manager to distribute to employees.

If you auto-issue budgets, define the Worksheet Budget rate equal to the Distribution Budget rate. Leave the Enter Value at Enrollment and Enter Annual Value fields unchecked. Enter the auto-issue percent or amount in the Flat Amount field.

Required?	Required if budgeting
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Checked (Unchecked for auto-issued budgets)
Override Recommendation	Checked
Unit of Measure Recommendation	Shares or Blank if monetary
Attach elements?	No

CWB Reserve

A reserve enables a manager to retain a certain amount of money or shares in a budget for distribution at a later time.

If you define distribution rates for components (options in plan), you must define reserve rates at the same level. If you auto-issue budgets, you should not define a reserve rate since managers will not have access to the Budget sheet to reserve any portion of their budget.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Checked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank or Shares
Attach elements?	No

CWB Eligible Salary

This activity type is required if you distribute budgets by percentage, and recommended for bonus and salary plans if you budget by amount.

If you define Worksheet Amount rates for components (options in plan), you must define Eligible Salary rates at the same level.

The Eligible Salary rate uses a derived compensation factor to determine an employee's eligible salary. You can prorate an employee's salary based on length of service using a FastFormula rule to determine their eligible salary.

Required?	Required if distributing budgets by percentage
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Stated Salary

Use for salaries that can be converted to a different frequency than the one set in a person's pay basis. The stated salary is stated as of a specific date and is usually a multiple of a compensation factor. Use stated salary if you want an amount other than eligible salary. Unlike eligible salary, you cannot prorate stated salary.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Other Salary

Used when eligible and stated salary are not sufficient to display the result of a calculated derived factor in Compensation Workbench.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Unchecked
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Misc Rate 1, 2, and 3

You can define miscellaneous standard rates to use for storing any numeric value in Compensation Workbench, for example, vacation hours, performance ratings, or length of service. Miscellaneous rates often require a FastFormula rule to derive a value. You can rename these columns in the self-service interface.

Required?	Never required
Maximum Defined Per Plan or Option	One of each
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Unchecked
Unit of Measure Recommendation	Blank if monetary, or use any value--this has no impact on processing
Attach elements?	No

CWB Recommended Amount

Displays minimum and maximum recommended compensation increases or awards on the worksheet. Often, recommended rates use variable rate profiles--based on a percentage of a multiple of compensation--to derive the recommend increase based on an employee's compensation.

If you define Worksheet Amount rates for components (options in plan), you must define Recommended Amount rates at the same level.

A manager can distribute a recommended amount using the Allocation Wizard.

Required?	Never required
Maximum Defined Per Plan or Option	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank or Shares
Attach elements?	No

CWB Total Compensation

The total of a person's compensation stated as a monetary amount. You must define a derived factor that provides the total through a balance or a FastFormula rule. Attach this derived factor to the rate that uses this activity type.

Required?	Never required
Maximum Defined Per Plan	One
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Grant Price

Records a stock option grant price if you maintain a grant price in Oracle HRMS. You can display the grant price on the Worksheet History page and through reports. You enter the grant price as a parameter when you run the Compensation Workbench Post Process.

As an estimate, you can enter the grant price in Compensation Workbench. The Post Process overrides this value with the value you enter when you run the process.

> **Note:** Define the CWB Grant Price activity rate even if you do not know the grant price.

Required?	Never required
Maximum Defined Per Plan	One
Assign on Enrollment Recommendation	Checked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Checked
Unit of Measure Recommendation	Blank
Attach elements?	No

CWB Additional Element History

Displays element entry history for compensation elements distributed outside of Compensation Workbench. For example, if your enterprise offers a signing bonus to executives, you could link the elements used to record the signing bonus to a Compensation Workbench bonus plan.

If you administer multiple plans of the same plan type (bonus, for example), you should link this activity type to only one standard rate for any plan of that plan type. The element will appear in the compensation history table corresponding to that plan type in Compensation Workbench.

Assign this standard rate a status of inactive to prevent the Participation Process: Compensation from processing the rate.

Required?	Never required
Maximum Defined Per Plan	No maximum
Assign on Enrollment Recommendation	Unchecked
Enter Value at Enrollment Recommendation	Unchecked
Override Recommendation	Unchecked
Unit of Measure Recommendation	Blank
Attach elements?	No

Compensation Workbench Statuses

Budget Status

Not Started: The manager has not started to allocate the Distribution Budget to the reporting managers.

In Progress: The manager has started to allocate the Distribution Budget but has elected Save and has not yet started to issue budgets (making the budgets available).

Issued: The manager has issued a budget to at least one reporting manager.

Worksheet Status

Not Started: The manager has not started to allocate Budgeted amounts to employees.

In Progress: The manager has started to allocate the Budget but has elected Save and has not yet submitted the worksheet for approval.

Complete: A high level manager has completed his or her own worksheet, but has not submitted the worksheet for approval.

Pending Approval: The manager has submitted the worksheet for approval.

Approved: The user's manager has approved the worksheet.

Processed: The Compensation Workbench Post Process has run. Award amounts are final, and--where applicable--sent to payroll.

Budget/Worksheet Access

Read Only: The manager cannot perform any allocations or distributions.

Updateable: The manager can update the budget or worksheet to perform distributions or allocations.

Not Available: The user cannot view the Budget or Worksheet.

Reporting in Compensation Workbench

Compensation Workbench delivers the following reports. Except where noted, these reports are all available for line managers through Self-Service.

- Employee Bonus Detail Report - Employee information for bonus plan distribution
- Employee Salary Detail Report - Employee information such as beginning salary, eligible salary, and new salary
- Employee Total Compensation by Year - Salary increases, bonuses, and stock option grants for each employee for a selected year
- Employee Stock Option Detail report - Employee stock allocation information, including grant price, number of shares, and value
- Compensation Comparison Report by Direct Manager - Summary of information similar to the data displayed on the Approvals page
- Employee Stock Options Total Position Report - Detailed employee stock option grant information or summary information
- Stock Option Download for Third-Party Administration Systems (available for HR administrator Responsibility only) - Generically formatted downloads to enable export of stock option data from CWB to a third-party system
- Total Compensation Progress Report - An administrator runs this report from the Professional User Interface to check the progress of the compensation cycle for a given compensation plan

A more detailed description of some of the reports follows. You can download several of the reports to an .xls file using Oracle Web Applications Desktop Integrator (Web ADI) a Self-Service application accessed using a browser. Managers do not need to install Web ADI on their own computer. Processing takes place on the server rather than on the individual's machine.

When you select a report, Web ADI generates an .xls document on your desktop and downloads the data from the report. You can edit and modify the document if necessary, but you cannot upload from Web ADI into Compensation Workbench.

Employee Stock Option Detail Report

The Employee Stock Option Detail report is configurable, allowing you to determine which columns you wish to display within the report, such as Date, Plan, Amount, Levels Down, and so forth.

There are several columns that are seeded as hidden columns. These include:

- Employee Full Name
- Person FlexX
- Today's Employment Status
- Job Segment 1
- Job Segment 2
- Job Segment 3
- Worksheet Manager Full Name
- Level 2 Manager Full Name
- Level 2 Manager
- Level 2 Manager Full Name

The hidden columns indicate the full range of available reporting attributes.

The Employee Stock Option Detail Report can be downloaded to a spreadsheet using Oracle Web ADI.

There are 4 reports that are Web ADI enabled.

Compensation comparison Report by Direct Manager

This report provides a summary of information similar to the data displayed on the Approvals page. The manager may select up to 25 different plans and plan year periods to compare in a single report. Depending on the plan or plans selected, the report includes Salary, Bonus, and Stock Option totals for a manager's employees and for any direct reports of the manager. In addition to providing summary totals, the report also includes values such as each manager's budget and the amount used.

The Compensation Comparison Report can be downloaded to a spreadsheet using Oracle Web ADI.

Employee Stock Options Total Position Report

A manager, or Administrator can run this report to view summary or detailed information about employee stock option grants, such as total shares granted, and total vested shares. You can run the report for a single employee, all direct reporting employees, or for any subordinate manager in the Oracle HRMS Supervisor Hierarchy.

You can select from one of two report styles controlling the columns displayed in the report:

- Summary Report Style
- Grant Detail Report Style

The Summary Report Style provides a high level view of various totals, such as Total Shares Outstanding, Total Market Value and Total Gain. There are several hidden seeded columns for this report including:

- Employee Full Name
- Total Market Value
- Total Gain
- Total Shares Granted
- Total Vested Market Values
- Total Vested Gain
- Total Exercised Shares
- Total Exercisable Shares
- Total Exercisable Gain

The Grant Detail Report Style provides a more granular view of employee's grant, such as the grant name and price. There are several seeded columns for this report including:

- Employee Full Name
- Grant Number
- Grant Name
- Grant Type
- Grant Shares
- Value at Grant
- Market Value Gain
- Vested Market Value
- Vested Gain
- Exercisable Gain
- Exercisable Shares
- Cancelled Shares
- Reason Code
- Class
- Misc.

To use this report, an administrator must enable the profile option for the extended stock history table. The profile name is BEN_CWB_HISTORY_TYPE_DISPLAY and the default value is Basic Stock History. If you do not enable this profile option for the extended stock history, the report will not be available.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

In addition, detailed stock option history must be loaded into HRMS from a third-party stock option administration system for it to be available on the Reports page. A system administrator can use the following public APIs to upload extended stock history from a third-party system.

BEN_CWB_STOCK_OPTN_DTLS_API.CREATE_CWB_STOCK_OPTN_DTLS

BEN_CWB_STOCK_OPTN_DTLS_API.DELETE_CWB_STOCK_OPTN_DTLS

BEN_CWB_STOCK_OPTN_DTLS_API.UPDATE_CWB_STOCK_OPTN_DTLS

An estimated Market Price may also be entered allowing managers to model a person's unvested stock option value or gain based on the price entered. This allows managers to predict how much an employee may be giving up by leaving the company.

The Employee Stock Options Total Position Report can be downloaded to a spreadsheet using Oracle Web ADI.

Managers run the reports from the Self-Service interface for various level in the organization hierarchy, such as all employees, direct reports, or 1 to 5 levels down in the organization hierarchy. For example, you can select any manager within your hierarchy, and one level down. This produces a report for the defined manager and that manager's direct reports. Access to the report is always available.

Compensation Workbench delivers online reports for use by Administrators:

- Stock Option Download for Third-Party Administration Systems
- Total Compensation Progress Report

Stock Option Download for Third Party Administration Systems

A compensation professional can run this report to download stock option grant results for all participants in a plan in an enrollment period. The report downloads the data to a spreadsheet using Oracle Web ADI. You can format this file for upload to a third-party stock option administration system.

Two report formats are available, one for Account Information and a second for Stock Option Grant Details.

The Account Information download contains information regarding the account such as, Name, Address, Social Security Number, Organization Name, HR Organization, Manager Name, Person ID, and Business Group ID.

The Option Information Download contains information such as Option Number, Plan, Type of Plan, Class, Option Date, Grant Date Market Value, Price, Shares, Vest Template, Vest Base Date, and Maximum SAR%.

The content and or format of the downloaded spreadsheets will likely need to be modified to meet the requirements of your third-party administration system. Please refer to your system documentation before attempting to import these files.

Total Compensation Progress Report

The Total Compensation Progress Report check the progress of the compensation cycle for a specific availability period and plan. The administrator can run the report at any time to produce different results based on the timing in the compensation cycle, such as after running the Participation Process: Compensation, during the allocation period, or after running the Compensation Workbench Post Process. This reports all monetary amounts stored in the system as of the date you run the report.

For example, your salary review period is September 1. The compensation cycle for the salary plan my be June 1 to August 1. This is the time when managers complete salary reviews for their eligible employees.

After running the Participation Process batch job, the progress report includes the number of employees whose status is started and processed, the number of eligible and ineligible employees, the number of employees who have or do not have electable choices, and a table describing the different rates with the total amount and total issued amount.

- After running the Post process batch job, the progress report summarizes the number of employee with a suspended distribution, and includes a table for each group of employees containing all the rates with the total amounts.
- The Payroll summary includes a table with all the elements and the total amount for each element attached to the specified plan for bonus and stock plans. This summary does not include Salary Plans.

Administrators can run the Report from the Submit Request window at any time.

See: Running the Compensation Workbench Progress Report, *Oracle HRMS Compensation and Management Guide*

Setting Up Compensation Workbench Plans

You set up Compensation Workbench plans using the Total Compensation data model. The windows you use to define a Compensation Workbench plan are a subset of those windows that you use to implement and administer Standard and Advanced Benefits.

Follow this process to set up plans for Compensation Workbench. Refer to the cross-references for further details.

For information about administering Compensation Workbench plans that you have defined, see: Compensation Workbench Processing, *Oracle HRMS Compensation and Benefits Management Guide*

To set up a compensation workbench plan:

1. Define plan years for the Compensation Workbench plan.
2. Define one life event reason for each plan.
3. Optional: define a derived compensation factor if compensation awards are based on a stored or system calculated value, such as eligible or stated salary.
4. Optional: define participant eligibility profiles to limit the employees who are eligible for a Compensation Workbench plan.
5. Define a plan type, selecting a compensation category.

6. Define the Compensation Workbench plan.
7. Optional: define compensation components (options) and link the components to the plan.
8. Define plan enrollment requirements.
9. Optional: define a reporting group to include multiple Compensation Workbench plans.
10. Optional: define elements if you want to transfer activity rates to Oracle Payroll or to third party applications. Link the elements.
11. Optional: define variable rate profiles if an activity rate can vary according to one or more factors.
12. Define standard activity rates.
13. Optional: define GL Daily Rates if you enable managers to view amounts in the budget or the worksheet in a currency that differs from the plan's currency.

Plan Years:

You use the Program/Plan Years window to set up plan years that define the year--or period within a year--during which an employee earned their compensation. You can use this amount, if, for example, you award a bonus based on a percentage of compensation earned during the period.

> **Note:** The application requires year periods for life event processing.

- Enter the plan year start and end dates. This is the year in which the employee earned the compensation.
- For compensation types that you award more than once per year (such as bonus plans)--or for which the employee earning period is less than a full year--enter a **Within Year Period**.

  Select the Unit of Measure that best represents your period. For example, select Semi-Year for compensation plans administered twice yearly.

Compensation Life Event:

You set up a life event reason for your Compensation Workbench plan so that when you process participant eligibility and electability, the batch process assigns the compensation life event to employees and schedules the availability period for budget and worksheet entry in Compensation Workbench.

On the Submit Requests window, you select Participation Process: Compensation to assign the life event to a person. The life event *occurred on date* is the Assigned Life Event that you define for the plan in the Plan Enrollment Requirements window.

> **Note:** To avoid life event collisions, set up one life event reason per Compensation Workbench plan.

- Enter a life event reason Name that corresponds to your plan. Provide a life event name that identifies the compensation type, and--if you operate globally--the legislation of the plan. A naming convention helps you to identify the life event in other application windows.
- Select a life event reason Type of Compensation.

Compensation Workbench life events require no additional set up. Do not define person changes for Compensation Workbench life events.

> **Note:** Standard Benefit users may only create life event reasons with the Types of Compensation or Absence.

See: Defining General Characteristics of Life Events, *Oracle HRMS Compensation and Benefits Management Guide*

Compensation awards are typically based on a derived compensation factor, such as eligible salary or stated salary. You link the derived factor to the standard rate or variable rate to determine the amount that is used in Compensation Workbench for display purposes to help a manager make a more informed decision about an award.

Derived compensation factors can use stated salary, defined balances, historical balances, prorated balances, benefits balances, salary as of a defined date, or a FastFormula rule that you define.

You can also use a derived factor as a component in a distribution calculation based on a percentage of the derived amount.

> **Note:** Use the derived factor to convert various pay bases to one pay basis for all employees.

See: Derived Factors, *Oracle HRMS Compensation and Benefits Management Guide*

You can define participant eligibility profiles to limit the employees who are eligible for a Compensation Workbench plan. If you do not define an eligibility profile, the application finds all employees and ex-employees eligible for your plan.

- In the Applies To field, select Benefits Profile for Compensation Workbench plans.

Compensation Plan Types:

Your plan requires a compensation plan type.

- Select Compensation Workbench as the Option Type.
- Select one of the following Compensation Categories:
- Comp - Bonus
- Comp - Stock Options
- Comp - Other (for promotion and performance plans)
- Comp - Salary

  Comp - Salary identifies compensation plans that alter the amount displayed on the Salary Administration window for a person after you process a compensation distribution.

See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

Compensation Workbench Plans:

You define a compensation workbench plan for each unique compensation offering or promotions or performance plan that you administer within Oracle HRMS for a business group.

Typical compensation plans include salary increases linked to a yearly focal review period, scheduled bonuses, and stock option grants.

You can also define plans for promotions/job changes and performance ratings.

See: Defining a Compensation Workbench Plan, page 10-80

Compensation Components:

If you itemize your compensation plan, you can define components to represent each item (Cost of Living or Merit, for example). You should attach two or more components to an itemized compensation plan.

You define components as Total Compensation options. For each option, select a plan type you defined with an Option Type of Compensation Workbench.

You can link a salary increase component to a salary administration component. Run the Compensation Workbench Post Process to update salary component values for an employee who received an award or compensation increase.

See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*

Plan Enrollment Requirements:

Set up plan enrollment requirements to determine the availability period of Compensation Workbench in Self-Service for a plan.

You also use plan enrollment requirements to enter items such as the:

- Assigned life event date
- Plan year or within year period for the compensation plan
- Close enrollment date
- Enrollment coverage and activity rate start and end dates
- Budget and worksheet characteristics and availability periods
- Supervisor or position hierarchy to use for budgets
- Dates on which performance ratings or job changes become effective

See: Defining Enrollment Requirements for Compensation Workbench Plans, page 10-82

Reporting Groups:

For Compensation Workbench, you can create a reporting group as a container to hold multiple plans. The name of the reporting group appears on the Home Page in Compensation Workbench.

Create a **global reporting group** to include plans from more than one business group. This enables a line manager to use a single signon to review and allocate compensation for employees in different business groups.

Defining a reporting group places a **plan switcher** on your Self-Service web pages that allows you to switch between available compensation plans. You must have eligible employees below you in the hierarchy to see more than one plan.

See: Defining a Reporting Group, page 10-86

Elements:

Use elements to transfer activity rates to Oracle Payroll or to third party applications. Elements record items such as the compensation that a line manager distributes to an employee.

> **Note:** You do not need to define elements for salary plans, only for bonus and stock option plans. The application automatically updates the employee's salary basis on the Salary Administration window.

If you have previously defined an element that you now want to use for a Compensation Workbench plan, you can use that element without defining a new one.

For compensation workbench, a typical element setup includes:

- A Primary Classification of Supplemental Earnings, for bonuses
- A Processing Type of Non-Recurring
- An Input Value of Pay Value in Units of Money
- For Stock Option plans with a unit of measure of Shares, select an element type of Information

See: Defining an Element, *Oracle HRMS Compensation and Benefits Management Guide*

Element Links:

You set up element links for Compensation Workbench plans as you would for Standard and Advanced Benefits.

See: Defining an Element Link, *Oracle HRMS Compensation and Benefits Management Guide*

Variable Rate Profiles:

Variable rate profiles are optional for Compensation Workbench plans.

You can use a variable rate profile, for example, if you provide an initial *recommended amount* for a compensation distribution. You could vary this amount based on a manager's demographics. A line manager can override the recommended amount within the guidelines of a minimum and maximum compensation range that you define.

Variable rate profiles are also useful if you auto-issue a fixed budget to all managers and you want to vary the issued amount based on a manager's demographics.

See: Defining General Information for a Variable Rate Profile, *Oracle HRMS Compensation and Benefits Management Guide*

Standard Rates:

You set up standard activity rates to record a variety of compensation amounts, such as:

- Distribution budgets
- Worksheet budgets
- Budget reserves
- Eligible or Stated Salary

Each standard rate uses an *activity type* to control many of the columns that display in Compensation Workbench. You set up different activity rates--with different activity types--depending on the kinds of values you want to record in Compensation Workbench.

If you budget or allocate for a component, you must set up activity rates for the option in plan rather than for the plan. If you have multiple components, and you check the Uses Budget check box on the Plan Enrollment Requirements window, you must budget for at least one component.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

See: Compensation Workbench Activity Types, page 10-64

GL Daily Rates:

Setting up GL Daily Rates enables your managers to use Compensation Workbench to enter and view budget and worksheet distributions in a currency that differs from the currency set for the profile option BEN: Benefits Preferred Currency, or, if you do not set this profile option, for the currency defined for the business group.

Line managers can select their preferred currency--you should only enable those currencies for which you have conversion rates.

- You must use a GL Daily Rate Conversion Type of **Corporate** for each currency you want to use with Compensation Workbench.

  Note: Conversions are for display purposes only and do not affect actual paid amounts.

See: Entering Daily Rates, *Oracle General Ledger Users' Guide*

Personalizing a Plan for Compensation Workbench

Plan-level personalization allows the professional user to configure the worksheet groups and the information that managers are able to view and update. You can use personalization to have multiple and different views of the same information available in the worksheet groups.

For instance, you can configure worksheet groups so managers can:

- view compensation history
- view job information
- view previous employee performance ratings
- perform employee evaluations
- award allocations

You can use personalization to move columns into a more meaningful arrangement, choose to display or not display items, and rename columns to match your business terminology.

You enable self-service personalization through the Professional User Interface using the System Administrator responsibility.

1. Navigate to Profile > System.
2. In the Define System Values Profile window, select either the Site or the Responsibility check box to enable personalization at the appropriate level.

3. In the Find field, Search for the Personalize Self Service Defn Profile.
4. Change the No to Yes for either Site- or Responsibility-level, as appropriate.

    Important: The system Administrator will need to "bounce" the Apache server before personalization is enabled in Self-Service.

    Note: The following steps are performed in the Self-Service Interface.

5. Log into the Manager Self-Service responsibility, and Select Compensation Workbench.
6. On the Home page, select the plan, the worksheet, and then the worksheet group you want to personalize.
7. Select the link, Personalize This Region for Benefits Plan Design, located at the bottom of the Worksheet Group page.

    Note: The left side displays all Available Columns you can choose to display in the worksheet group for the selected plan; the right side lists the Columns Displayed in the worksheet group for the selected plan.

8. Select items you want to add or remove by highlighting them in either column and using the appropriate left or right arrow on the slider. Additionally, you can reorder the sequence of columns displayed by using the up and down arrows on the slider.
9. To change the name of a column, choose the Rename button. Select the item you want to rename and change the name.
10. Save your work.
11. . You can select the Apply button to save your changes to the worksheet group, or you can select the Delete button to cancel your changes.

    Note: You can select the Delete Customization button to return to the original design of the worksheet group after changes have been applied.

Defining a Compensation Workbench Plan

Use the Plans window to define a compensation workbench plan.

Note: You can also use the Plans window to define employee benefits plans. Compensation plans use only a subset of the features available on the Plans window.

1. Enter the plan Name.

    Note: By using a generic plan name (one that does not include a particular year period), you can reuse the plan over multiple award periods.

2. Select a Status of Active.

Change the status to inactive to make the plan unavailable in Compensation Workbench.

3. Select the Plan Type you created for this plan.
4. In the Plan Usage field, select May not be in Program.
5. Choose the Eligibility Rates tab.
6. Check the Track Ineligible Person field to enable eligibility overrides without having to rerun the Participation Process: Compensation to determine eligibility or rates.
7. Choose the Not in Program tab.
8. Enter the Sequence number of this plan if you want compensation plans to display in a particular order in Self-Service.
9. Select the Currency of your plan.

   You must create a separate plan for each plan with a unique currency.
10. Leave the Enrollment Rate/Frequency field blank.
11. Select an Activity Reference Period that matches your most common pay basis.

    This determines the period for which the base salary is displayed, and the amount in which salary increases are entered.

    Note: If you select Hourly as the Activity Reference Period, ensure you have defined a value for the BEN:BEN HOURLY ANNUALIZATION FACTOR user profile option. This defaults to 2080, meaning that there are assumed to be 2080 hours in a year (8 hours * 5 days * 52 weeks).

12. Choose the Details button to open the Maintain Plan Related Details window.
13. Choose the Plan Periods tab.
14. Attach the plan years you defined to the plan.
15. Choose the Compensation Workbench tab, and enter a sequence number for the first worksheet group you are adding. You can attach any combination of the same or different worksheet groups.

    Note: If you do not attach any worksheet groups, Self-Service defaults to show the Compensation Worksheet Group. Existing Compensation Plans do not require modification.

16. Give your worksheet group a unique name -- this name will appear on the tab in the Self-Service interface.
17. Close the Maintain Plan Related Details window.
18. Choose the Plan Eligibility button if you want to link a participant eligibility profile to the plan.
19. Choose the Eligibility button.
20. Attach any applicable participant eligibility profiles that you created.
21. Close both the Eligibility window and the Maintain Plan Eligibility window.
22. Choose the Options button if you itemize this compensation plan.

23. Enter the sequence number of the first component.
24. Select the component in the Option field.
25. Select a Status of Active.
26. Check the Hidden check box if you want to hide this component from a manager's budget and worksheet.
27. Choose the Eligibility tab.
28. Attach any applicable participant eligibility profiles that you created.
29. Check the Track Ineligible Person field to enable eligibility overrides without having to rerun the Participation Process: Compensation.
30. Repeat steps 23 to 29 for each component in the plan.
31. Save your work.

Defining Enrollment Requirements for Compensation Workbench Plans

Use the Plan Enrollment Requirements window to define the scheduled availability period for a Compensation Workbench plan and to establish certain budget and worksheet properties.

> **Note:** You can also use the Plan Enrollment Requirements window to define electability requirements for employee benefits plans. Compensation Workbench plans use only a subset of the features available on this window.

1. Query the plan for which you are defining enrollment requirements in the Plan field.
2. With the General tab and the Plan tab selected, choose the Enrollment tabbed region.
3. Select Explicit as the enrollment Method.
4. Select Current, Can Keep or Choose; New, Can Choose as the Enrollment Code.
5. Choose the Coverage tabbed region.

   > **Note:** By setting coverage and activity rate start and end dates at the plan level you will not have to update these codes for each availability period.

6. In most instances, select Elections as the Enrollment Coverage Start Date.

   This starts the employee's coverage as of the effective date of the Compensation Workbench Post Process.
7. Required: select 1 Prior or Event as the Enrollment Coverage End Date.

   This ends the employee's coverage one day prior to the start of any subsequent coverage.
8. Choose the Rates tabbed region.
9. In most instances, select Elections as the Rate Start Date.

   This starts the employee's rate--and element entry--as of the effective date of the Compensation Workbench Post Process.

10. Required: select 1 Prior or Event as the Rate End Date.
11. Choose the Timing tab and then the Scheduled tab.
12. Select Compensation as the Enrollment Type.

    You can only select this Enrollment Type if the option type of the plan type you attached to this plan is Compensation Workbench.
13. In the Enrollment or Availability Period Start and End fields, enter the date range for which Compensation Workbench is available in Self-Service for this plan.

    Availability periods for the same plan cannot overlap.

    Attention: Once you run the Participation Process: Compensation, you cannot change the availability period unless you back out the life event. Subsequent runs of the process must be *after* the previous life event has been closed for all individuals and the previous availability period has ended.
14. Enter the effective date of the compensation life event in the Assigned Life Event Date field.

    The assigned life event date sets the date on which the Compensation Participation Process evaluates your plan design to determine eligibility, activity rates, and each employee's worksheet manager.
15. Select a previously defined compensation life event reason for this plan in the Life Event field.

    Note: You can only have one life event per plan.

16. In the No further processing is allowed after field, enter the last date on which you can make changes in the professional user interface to this compensation plan.
17. Enter a Close Enrollment Date to use code that determines the date when the life event status is changed from started to processed:
    - Processing End Date (Closed by the Close Compensation Enrollments Process on the No further processing date)
    - When Elections Are Made (**Recommended**--Closed by the Compensation Workbench Post Process on the effective date of the process)
    - When Enrollment Period Ends (Closed by the Close Compensation Enrollments Process as of the Availability Period end date)
18. Select the Year Period of this plan.
19. Select a Within Year Period if this plan uses a period of less than a year to determine available compensation.

Budget Characteristics

Note: Because Budgets are not used for Promotion and Performance Plans, you must leave the budget tabbed region blank. For promotion and performance plans, skip to step 25., page 10-84

20. Choose the Budget tabbed region.
21. Select the Uses Budget check box to enable higher level managers to issue budgets to lower level managers.

You must check this field to enable the use of budgets at any level in the application.

22. Optionally, select the Automatically Allocate Defined Budgets check box to update the allocation worksheet for all managers with a predefined budget amount after you run the Compensation Pre-Process.

23. Select whether to store budgets as percents or amounts in the Preserve Budget Column field.

    If you select percent (recommended), the application automatically recalculates a manager's distribution budget and worksheet budget if an employee becomes eligible or ineligible or is reassigned from one manager's worksheet to another's.

24. Enter the date range for which a manager can access and update the Budget in the Self Service Budget Update Period block.

    You can change the date range for the budget at any time without having to re-run Participation Process: Compensation for the change to take effect.

Worksheet Characteristics

25. Choose the Worksheet tabbed region.

26. Enter the date range for which a manager can access and update the Worksheet in the Self Service Worksheet Update Period block.

    You can change the date range for the worksheet at any time without having to re-run Participation Process: Compensation for the change to take effect.

27. Select the Default Worksheet Access for all managers:

    - Not Available
    - Read Only
    - Updateable

      You can **override** the default worksheet access for a manager using the Person Life Events window. Using Self-Service, a higher level manager can set the default worksheet access for lower level managers within their hierarchy.

Hierarchy and Performance Ratings

28. Choose the Miscellaneous tabbed region.

29. Select whether you administer Compensation Workbench plans based on a manager's supervisor hierarchy or a position hierarchy.

30. Select a position hierarchy if you administer this plan based on positions.

    The application checks for a manager's supervisor if it cannot find a position in the hierarchy above the manager's current level. This supervisor can be in a different business group.

    If you use position hierarchies--and you want an employee to report to a supervisor in a different business group for budget purposes--create a *placeholder* position above that employee in the hierarchy and do not assign a person to the position.

31. If you maintain employee performance ratings in Oracle HRMS, and you want to display those rating in Compensation Workbench, select the Performance Rating Type to use for this plan.

You can only display one performance rating type at a time for a compensation plan in Compensation Workbench.

> **Note:** For Performance Plans, enter the date in the New Ratings Become Effective field.

> **Note:** For Promotion Plans, enter the date in the Assignment Changes Become Effective field.

32. Save your work.

Configuring Descriptive Flexfields within Compensation Workbench

Descriptive Flexfields are only available in the worksheet and are specific to the plan, life event, and availability period for which you enter data. Each time the Participation Process is run, a new life event is given to the person; therefore all Descriptive Flexfields will be blank for each new plan and availability period. When you enter data into the Flexfield, the system stores it in the professional user interface, and you can view it from the Person Life Event window.

Within the Self-Service interface, Descriptive Flexfields display on their own Flexfield Worksheet Group subtab within the Worksheet. You may configure each Flexfield segment to appear on its own Worksheet Group subtab or to all appear on the same subtab. Configuration of the Descriptive Flexfield may be done using either Framework or plan personalization.

You define the Descriptive Flexfields from the Access Descriptive Flexfield Segment window.

To configure Descriptive Flexfields within Compensation Workbench:

1. Query the title, ’Additional Ben Pil Elctble Chc Popl Details.
2. Uncheck Required and Displayed.
3. Add your segment definitions.

   > **Tip:** Define all the Flexfield segments within a Global Data Element. Do not define your Flexfield segments as required. If using table validation, use the ’Poplist’ if you use less than 50 rows, otherwise choose ’LOV.’

4. Save and freeze the Flexfield definition.

To define a Worksheet Group for the new Flexfields:

You define the Worksheet Group from the Plan Definition window.

1. Query the Plan to which you want to add Flexfields.
2. Select Details, and choose the Compensation Workbench tab.
3. Optionally, insert a row for the Compensation Worksheet Group.
4. Provide a sequence number of 1, if you want the Compensation Worksheet to appear first.
5. Select a Worksheet Group of ’Compensation to enable you to allocate compensation.

6. Provide a Self Service Label -- this displays as a subtab navigation link within the worksheet in Compensation Workbench.
7. Insert a row for the Additional Flexfields Worksheet Group by entering a sequence number, a Worksheet Group of 'Flexfields', and a Self Service Label.
8. Repeat the step above to create multiple Worksheet Groups to display different segments of the Descriptive Flexfield.
9. Save your work, and restart your server.

To personalize your Worksheet Group in the CWB user interface:

> **Important:** Ensure that personalization links are turned on and that the Compensation Process has already run.

1. Select the Plan from the homepage and continue to the Worksheet
2. Select the new Worksheet Group you defined.
3. Click the 'Personalize Worksheet Group' link.
4. Choose a personalization level, and ensure that 'PelFlex' is a displayed column.
5. Define the Flex Settings and apply.

   > **Note:** In the Flex Segment List, you must enter the Segment Information using the following structure:
   >
   > ContextName|SegmentName1|SegmentName2|"ContextName2"|SegmentName3|SegmentName4
   >
   > Example: Global Data Element|Compensation Month|Misc Use

   > **Important:** Spelling must match exactly as defined in the Flexfield.

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.

Individual Compensation Distributions (ICD)

Self-Service Individual Compensation Distribution

Managers and other employees responsible for distributing compensation use Self-Service ICD to assign one-time or recurring awards, bonuses, and allowances to qualified employees such as housing allowances, spot bonuses, and company cars. Employees use Self-Service ICD to enter voluntary contributions, such as savings plans, charitable organizations, and company perquisites.

Components

Compensation Managers use the Oracle HRMS professional user interface to define components of the award or allowance. They also configure employee self-service ICD for use by non-manager employees. The manager or the employee uses Oracle SSHR to assign the award. Compensation Managers set up the following:

- Plan Design - plan types, plans and options
- Enrollment Requirements for the Plan - coverage/rates start and end dates, action items and certifications
- Activity Rates and Coverage Calculations for the Plan

Security Features

Security features in Oracle HRMS ensure that managers can assign a distribution only to employees and contractors within their security group.

Workflow Approval

Oracle SSHR seeds a workflow approval process that automatically sends a notification to the supervisor of the manager, or the manager of the employee who assigned the distribution. The supervisor or manager can either approve or reject the distribution.

Individual Compensation Distributions (ICD)

The Individual Compensation Distributions (ICD) module enables managers to assign compensation distributions to employees. Use ICD for both one-time and recurring awards, such as bonuses or allowances to employees.

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

The Benefits or Compensation administrator needs to define the individual compensation distribution plans using Oracle Advanced Benefits or Oracle Standard Benefits.

See: Self-Service Individual Compensation Distributions, page 10-90

Menu and Function Names

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

User Menu Name	Function Name
Manager Self Service	Individual Compensation Distributions

See: Defining User Access and Menus, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Compensation Distribution

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
Comp Plan Selection	Benefits Communication Type	CPS.PLAN_SELECTION_ CONTENT
Compensation Update Mode Selection Content	Long Message	BEN_92737_COMP_UPD_ MD_INSTR
Compensation Details Content	Benefits Communication Type	CPD. COMP_DETAILS_ CONTENT
Compensation Review Content	Benefits Communication Type	(Review Page): CPC.COM P_CONFIRM_CONTENT (Confirmation Page): CPR. COMP_REVIEW_CONTENT

See: Adding Instructions to Web Pages, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Not applicable

Self-Service Individual Compensation Distributions (ICD)

Using Oracle HRMS, you can give managers throughout your enterprise the authority and ability to assign one-time or recurring awards, bonuses, and allowances to qualified employees and other individuals using Oracle Self-Service Human Resources.

As a compensation manager, you set up individual compensation distribution plans to define the components of an award or allowance. The line manager uses the self-service interface to assign the award - setting the start and end date of the distribution - while the back-office maintains control of the plan's administration.

You can also configure *employee self-service* ICD for use by non-manager employees. For example, if your enterprise offers a charitable contribution plan or a savings bond plan to which employees contribute at their own discretion, you can enable the contribution through the self-service interface.

Using elements, you can process the distributions through Oracle Payroll. For recurring distributions, you can define the distribution end date, or, using FastFormula, enforce the total maximum distribution you allow in a period.

Security features in Oracle HRMS ensure that managers can assign a distribution only to employees and contractors within their security group. Participant eligibility profiles offer a further way to limit distributions to eligible employees based on a range of criteria, such as assignment data.

Oracle Self-Service HR seeds a workflow approval process that automatically sends a notification to the supervisor of the manager who distributes the award. The manager's supervisor can either approve or reject the distribution.

Setting Up Individual Compensation Distribution Plans for Self-Service Human Resources

Follow these process steps to set up a variety of individual compensation distribution plans, such as:

- Periodic or spot bonuses
- Sponsored allowances
- Resettlement compensation
- Severance Payments
- Other periodic or recurring awards

As a compensation and benefits administrator, you define an individual compensation distribution plan using the features of Oracle Standard Benefits or Oracle Advanced Benefits.

Once you define the compensation plan, a line manager issues the compensation distribution to the employee through Oracle Self Service Human Resources.

See the following topics for more information on setting up ICD:

- Define the Individual Distribution Compensation Plan, page 10-91
- Define Enrollment Requirements for the Plan, page 10-92
- Set Up Activity Rates and Coverages for the Plan, page 10-93
- Configuring ICD Web pages, page 10-95
- Entering People for Test Purposes, page 10-95
- Setting Up Employee Self-Service Access to ICD, page 10-96

Define the Individual Distribution Compensation Plan

You set up an individual compensation distribution plan by defining the characteristics of the plan and any electable options in the plan. If necessary, you can define participant eligibility profiles to limit the participants who are eligible for the plan or option.

Setting up self-service individual compensation distribution plans:

1. Define the Plan Year start and end dates for the compensation plan. Set up several plan years to account for future plan years.

   See: Defining a Program or Plan Year Period, *Oracle HRMS Compensation and Benefits Management Guide*

2. Optional: define a participant eligibility profile to control eligibility for the compensation plan.

   If you do not define a participant eligibility profile, the application finds all employees and contractors reporting to the manager eligible for the distribution.

   > **Note:** Set the participant eligibility profile status to active if you define a profile.

   See: Defining an Eligibility Profile, *Oracle HRMS Compensation and Benefits Management Guide*

3. Set up one or more Plan Types to group the compensation plans you administer.

   - Required: select an Option Type of Individual Compensation Distribution to enable a manager to distribute the award through the self-service interface.
   - Optional: select a Compensation Category of Compensation for reporting purposes or for system extracts.

   You can choose to set up a single plan type for all your compensation plans, or you can define multiple plan types for groupings of plans (Bonus, Allowance, Severance, and others).

   > **Note:** You should base the number of plan types you define on your reporting requirements.

   See: Defining Plan Types, *Oracle HRMS Compensation and Benefits Management Guide*

4. Optional: define the options in the compensation plan.

   - Enter a user friendly option name to display in the self service web page.
   - Select the corresponding plan type of each option.

   > **Note:** Use options when there is a logical grouping of choices within a plan, such as a car allowance plan with options of BMW, Honda, and Ford. For bonus plans, severances, and allowances, set up each compensation type as a separate plan.

   See: Defining Options, *Oracle HRMS Compensation and Benefits Management Guide*

5. Define the individual distribution compensation plan.

   - Enter a user friendly plan name to display in the self service web page.
   - Select the plan type of the plan.

- Set the plan status to active. You can update the status to inactive if you need to temporarily disable the plan.
- Select a Plan Usage code of May Not Be In a Program.

In the Not in Program tabbed region:

- Enter a sequence number that indicates the order in which the plan displays in the self service web page relative to other plans in the plan type.
- Select the currency of the plan for monetary distributions. You do not enter a currency for non monetary allowances, such as cars.
- Select the Activity Reference Period of the plan. For recurring awards, the activity reference period is the period the manager sees when distributing the award, for example, $100 per period.

For non recurring awards, you can select any activity reference period.

See: Defining a Benefits Plan, *Oracle HRMS Compensation and Benefits Management Guide*

6. Link the Plan Years to the plan that you defined in Step 1.

   See: Maintaining Plan Related Details, *Oracle HRMS Compensation and Benefits Management Guide*

7. If you defined options in Step 4, link the options to the plan.

   - Set the status for each option to active. You can update the status to inactive if you need to temporarily disable an option.

   See: Associating Options with a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

8. Link a participant eligibility profile to the plan if you limit eligibility for the plan.

   Define Enrollment Requirements for the Plan

   You use the Plan Enrollment Requirements window to control the enrollment method for an individual compensation distribution plan. You can also set up required certifications that the individual must provide before Oracle Payroll distributes the award.

To define plan enrollment requirements:

1. Define enrollment requirements for the plan.

   - Query the plan you defined in step 5 above.
   - Select an enrollment method of Explicit.
   - Check the Allows Unrestricted Enrollment check box.
   - If you define coverages, select a Coverage Start Date code of Enterable if you want to let the manager enter the coverage start date. The application distributes the award to Payroll following the date. If you do not want the manager to enter the start date, select any other coverage state date code.
   - Select a Coverage Start Date code of Event to set the start date to the system date when the manager enters the self service web page. Use this code for non-recurring awards. The application distributes the award to Payroll in the following payroll period.

- Required: select a Coverage End Date code that corresponds to your Coverage Start Date code.
- Activity Rate Start and End Date codes function similarly to coverage codes. Choose Enterable for recurring allowances; for non-recurring allowances, choose Event.

See: Defining Enrollment Requirements for Not in Program Plans, *Oracle HRMS Compensation and Benefits Management Guide*

2. Optional: for Advanced Benefits users, link one or more certifications to the plan if you request or require certification from the participant before you make the distribution.

   Oracle HRMS seeds the certification types available with the application.

   > **Note:** If you require a certification, the application suspends the payroll distribution of the award until the participant returns the certification. A message displays to the issuing manager indicating that the distribution is suspended.

   See: Defining Certifications for Enrollment in a Plan, *Oracle HRMS Compensation and Benefits Management Guide*

   See: Defining an Action Item Due Date (Advanced Benefits), *Oracle HRMS Compensation and Benefits Management Guide*

3. Optional: for Advanced Benefits, you can define communication types that the application generates to inform the participant of a suspended distribution.

   You set up a system extract to write the applicable information from the communication type to a text file. You can then merge the data from the text file into the body of the participant communication.

   See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

Set Up Activity Rates and Coverages for the Plan

You set up activity rates to define the amount of a distribution (for fixed rate distributions) or to indicate that the manager enters the distribution amount when the award is assigned in the self-service web page.

> **Note:** You can set up multiple activity rates for an ICD plan; however, you can choose only one rate to display on enrollment to the self-service user.

To set up activity rates for a plan:

1. Optional: set up an activity rate for an individual compensation distribution plan or option in the following cases:
   - You do not use coverages.
   - You offer a monetary award and you want to distribute the amount of the award to payroll.
   - You create element entries for the award.
   - You award a non monetary gift (defined as a coverage) and you need to keep records of the taxable benefit.

- You want to control the maximum amount that can be distributed for a recurring element.

  Note: In order to control the maximum distribution amount, you must configure Oracle Payroll using FastFormula.

Follow these guidelines when setting up the activity rate:

- Set the activity rate status to active.
- Indicate if the activity rate applies to a plan or to an option in a plan.
- Select any Activity Type code.
- Select a Usage code of Standard Contribution/Distribution.
- Select a Unit of Measure if the award is non monetary.

  Note: If the Unit of Measure is monetary, do not select any unit of measure.

- Select a rate certification type if you want to suspend the rate until the appropriate certification is received and approved.

Define the calculation method for the activity rate.

- If the award is a flat amount, enter the value of the award.
- If the award is not a flat amount, check the Enter Value at Enrollment check box. For recurring awards, the value the manager enters at enrollment is per the activity reference period defined for the plan.
- Check the Assign on Enrollment and Display on Enrollment check boxes.

See: Defining Activity Rates for a Standard Contribution/Distribution, *Oracle HRMS Compensation and Benefits Management Guide*

2. Optional: define a variable rate profile if the activity rate varies according to one or more factors, such as the assignment of the person to whom the manager distributes the award.

   You can also use variable rate profiles to minimum and maximum distributions, increments, and default rates.

   See: Defining General Information for a Variable Rate Profile, *Oracle HRMS Compensation and Benefits Management Guide*

3. Optional: create a taxable benefit rate for use with non monetary coverages.

   You set up a taxable benefit rate for non monetary coverages like you define a standard activity rate, with the following exceptions:

   - Leave the Unit of Measure field blank.
   - Select a Calculation Method of Multiple of Coverage.
   - Uncheck the Enter Value at Enrollment field.
   - Define a multiplier where the number represents the value of one non monetary award.
   - Select a Coverage Operator of Multiply by.

- Select a Rounding Code of Round to Nearest Hundredth.
- Uncheck the Display on Enrollment check box.

  Note: You may have to define your coverage first before saving this rate.

4. Optional: create a Maximum Distribution Rate to accompany the standard rate.

   You set up a Maximum Distribution Rate like you define a standard activity rate, with the following exceptions:

   - Select an Activity Type of Total Distribution Limit.
   - Leave the Unit of Measure field blank.
   - Leave the Recurring field blank.

5. Optional: define coverages for the plan if:

   - The award is non monetary and you do not want element entries created for the non monetary award.
   - The award is a non monetary gift (which is defined as a coverage) and you need to keep records of the taxable benefit.
   - You do not define standard activity rates.

   See: Defining a Coverage Calculation, *Oracle HRMS Compensation and Benefits Management Guide*

   Follow these guidelines when you set up a coverage definition:

   - Enter a name for the coverage.
   - Select a coverage type.
   - Select a Unit of Measure if the Type is not Coverage.
   - On the Calculation Method Tab, select a Calculation Method of Flat Amount.

     Note: If you want the user to enter the value during the enrollment check the Enter Value at Enrollment check box. Otherwise, enter the amount.

   - For recurring distributions, the coverage amount is per the activity reference period defined in the plan.

     Note: You should set up no more than one coverage per compensation plan or option.

     Configuring ICD Web pages

You use the Application Dictionary to configure the field labels, hints, tips, and messages that display in an ICD web page.

You can also configure menu names, function names, and certain workflow attributes.

See: Individual Compensation Distributions (ICD), page 10-88

Entering People for Test Purposes

You can enter sample people into the Oracle HRMS database to test your Individual Compensation Distribution plan.

Define a Manager:

Using the People window, define a manager with a date of birth, social security number, and address.

6. Enter an Assignment for the manager.
7. Check the Manager check box located in the Miscellaneous tabbed region.
8. Select the manager's GRE in the GRE tabbed region.

Define an Employee:

Using the People window, define an employee with a date of birth, social security number, and address.

> **Note:** If you use eligibility profiles, make sure the test employee meets your eligibility requirements.

9. Enter an Assignment for the employee.
10. Select the test manager you created as the employee's supervisor on the Supervisor tabbed region.
11. Select the employee's GRE in the GRE tabbed region.

Create a User Name and Password for the Test Manager:

As a system administrator, open the User Types window to define a user name and password for the manager you created.

12. Link the Manager Self Service responsibility to the user name.
13. Save your work and close the window.

Assign an Individual Compensation Distribution to the Employee:

Using the manager's user name and password, log on to Oracle Self Service HR.

14. Choose the Individual Compensation menu item.
15. Find the Employee you created.
16. Assign the individual an award.

Setting Up Employee Self-Service Access to ICD

You can configure ICD for employee self-service access. Use this feature if your enterprise administers charitable contribution plans, savings bond plans, or service recognition plans where you allow the employee to select from one or more awards.

> **Note:** You set up employee self-service plans as you would other plans, using the professional user interface. However, you should include employee self-service plans in their own plan type, so that participants cannot view plans only available to managers.

To set up employee self-service access to ICD:

1. Log in to Oracle HRMS using a System Administrator responsibility and open the Form Functions window.

2. Choose the Description tab.
3. Enter a new function name--without spaces--in the Function field.
4. Enter a User Function Name for this function.
5. Select SSWA JSP Function as the function Type.
6. Optional: enter a Description of the function.
7. Choose the Form tab.
8. Enter the following parameter, substituting the function name you entered in Step 3 and your plan type IDs where indicated:
   - pProcessName=HR_INDIVIDUAL_COMP_PRC&pItemType=HRSSA& pCalledFrom=<your new function code>&PLANTYPE=<your plan type IDs separated by commas>
9. Choose the Web HTML tab.
10. Enter the following string in the HTML Call field:
    - OA.jsp?akRegionCode=HR_CREATE_PROCESS_TOP_SS& akRegionApplicationId=800
11. Save your work.
12. Close the Form Functions window and open the Menus window.
13. Add the function you just created to the Employee Self-Service Menu.
14. Save your work.

    See: Defining Communication Types, *Oracle HRMS Compensation and Benefits Management Guide*

    See: Defining When a Communication is Used, *Oracle HRMS Compensation and Benefits Management Guide*

11

Payroll Process Management

Payroll Overview

SSHR provides self-service functions within the following areas of Payroll Process Management:

- Payroll Payment and Distributions
    - Online Payslips
- Payroll Statutory Deductions and Reporting
    - Tax reports

This chapter looks in detail at the self-service functions available within these areas and provides information on the functionality and configuration options for each function:

Using SSHR with Payroll Functions

Can SSHR users access payroll information online?

Yes. The self-service Online Payslip function enables users to display their own payslip using the self-service interface.

Are these payslips configurable?

Yes. Administrators can use the Personalization Framework functionality to configure the payslip to suit their requirements. Payslips are also available for some localizations.

Can users use the self-service functionality to specify how their salary should be paid?

Yes. You can use the Payment Methods function to specify whether your salary is paid using a check, or a direct deposit, for example.

Can managers see the payslips for their employees?

Sometimes. The Online Payslip function is intended to be an employee-only function and is available from the Employee Self Service menu, however, the Online Payslip function is also available from the Payroll Professional menu which enables a third-party to access the payslip.

Can users view any other payroll information using SSHR?

This depends on your localization. Some users, for example, users in the US, can view tax withholdings information using SSHR. This tax information can be updated and maintained as required and then submitted to the tax authority. Alternatively, the tax information form enables users to display tax statements for information purposes.

Payroll

Payment Methods

The Payroll Payments module enables self-service users to specify how they wish their salary to be paid by dividing their net pay into one or more payments. Each payment is of a particular type (cash, check, deposit) and has an associated amount and a priority. The payments are made in order of priority. SSHR always uses the lowest priority payment to pay any net pay remaining after all the other payments have been made. It is also possible that low priority payments may not receive all (or any) or their allotted funds because of the amounts used to process higher priority payments.

A typical use of this function occurs if a user wants to split their net pay so that $100 is paid into a savings account and the rest is paid into a current account. The user can subsequently change the amount paid into the savings account if required.

You can apply configuration options to determine:

- whether users can use the module for multiple payments
- whether payment information is for viewing only
- which types of payments the user can select (cash, check, deposit, or a combination)
- how the payment amounts are defined (percentage of net pay or a monetary amount)
- the maximum number of payments a user can set up
- which organization payment methods are used

If you configure Payment Methods so that users can edit their payments, they can carry out the following steps:

- create new payments
- update existing payments
- delete payments
- change the priorities for payments

> **Note:** You must ensure that the required payment methods are available for the employee assignment. For information on enabling payment methods, see: Entering Payment Methods for an Employee Assignment, *Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide*.

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Manage Payroll Payments

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Process Payroll Payments

> **Note:** The Process Payroll Payments module does not support approvals.

Configurable Workflow Attributes:

Process Display Name	Function Activity Display Name	Function Activity Attribute Display Name
Process Payroll Payments	Manage Payroll Payments	View Only
Process Payroll Payments	Manage Payroll Payments	Permitted Payment Types
Process Payroll Payments	Manage Payroll Payments	Maximum Payment Methods
Process Payroll Payments	Manage Payroll Payments	Permitted Amount Types
Process Payroll Payments	Manage Payroll Payments	Deposit Payments List
Process Payroll Payments	Manage Payroll Payments	Cash Payments List
Process Payroll Payments	Manage Payroll Payments	Cash Payments List

View Only

Specifies whether the user can edit the payments information. The default value enables editing.

Permitted Payment Types

Specifies which types of payment methods a user can create. The available payment types are cash, check, and deposit. The default value allows the user to create any of the three payment types.

Maximum Payment Methods

Specifies the maximum number of payments that a user can create (up to 10). The default value is 5.

Permitted Amount Types

Specifies the amount types for payments. The payment amount can be a monetary amount or a percentage of net pay. The default value enables both amount types.

Deposit Payments List

This attribute is only used if you have enabled deposit payments. This attribute stores a list of Organizational Payment Method (OPM) names that can be used to create a deposit payment. The OPM names are separated by a vertical bar (|). The module uses the first match to a deposit OPM name (for the worker's payroll) when new deposit payments are created. For example, East_Coast_NACHA|West_Coast_NACHA.

Cash Payments List

This is used in the same way as the Deposit Payments Checklist but for cash payments.

Check Payments List

This is used in the same way as the Deposit Payments Checklist but for check payments.

> **Note:** The administrator must set at least one of Deposit Payments List, Cash Payments List, or Check Payments List.

See: Configuring Workflow Attribute Values, page 4- 8

Configurable Definitions for the Personalization Framework:

The following definitions can be configured in the Personalization Framework:

Regions

Summary and Edit Pages

Region Code	Region Name
PAY_PAYMENTS_TOP_SS	Payroll Payments Top
PAY_PAYMENTS_EDIT_SS	Payroll Payments Edit
PAY_PAYMENTS_SUMMARY_SS	Payroll Payments Summary
PAY_PAYMENTS_LABELS_SS	Payroll Payments Labels

Review Page

Region Code	Region Name
PAY_PAYMENTS_REVIEW_SS	Payroll Payments Review

Tips and Instructions

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 1		PAY_PSSV4_ ADD_CASH_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 2		PAY_PSSV4_ ADD_CHECK_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 3		PAY_PSSV4_ ADD_CHEQUE_ OVERVIEW
PAY_ PAYMENTS_ED IT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 4		PAY_PSSV4_ ADD_DEPOS IT_OVERVIEW

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_EDIT_INS1_SS	Payroll Payments Edit Create Mode Instructions	Pay Instruction 5		PAY_PSSV4_ ADD_REMAINING_PAY
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 1		PAY_PSSV4_UPDATE_CASH_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 2		PAY_PSSV4_ UPDATE_ CHECK_OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 3		PAY_PSSV4_ UPDATE_ CHEQUE_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 4		PAY_PSSV4_UPDATE_DEPOSIT_OVERVIEW
PAY_ PAYMENTS_EDIT_INS2_SS	Payroll Payments Edit Update Mode Instructions	Pay Instruction 5		PAY_PSS_REMAINING_PAY
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 1		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 2		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 3		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 4		PAY_PSSV4_ DETAILS_ OVERVIEW
PAY_ PAYMENTS_EDIT_INS3_SS	Payroll Payments Edit View-only Mode Instructions	Pay Instruction 5		PAY_PSS_REMAINING_PAY

Region ID	Region Name	Attribute Name	Tip Type	Message Name
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 1		PAY_PSSV4_ SUMMARY_ED IT_OVERVIEW
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 2		PAY_PSS_ EDIT_DFLT_ MANDATORY_ PAY
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 3		PAY_PSS_EDIT_ DFLT_CASH
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 4		PAY_PSS_EDIT_ DFLT_CHECK
PAY_ PAYMENTS_ SUMMARY_ INS1_SS	Payroll Payments Summary Edit Mode Instructions	Pay Instruction 5		PAY_PSS_EDIT_ DFLT_CHEQUE
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 1		PAY_PSSV4_ SUMMARY_V IEW_OVERV IEW
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 2		PAY_PSS_ MANDATORY_ PAY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 3		PAY_PSS_ CASH_SALARY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 4		PAY_PSS_ CHECK_ SALARY
PAY_ PAYMENTS_ SUMMARY_ INS2_SS	Payroll Payments Summary View-only Mode Instructions	Pay Instruction 5		PAY_PSS_ CHEQUE_ SALARY

See: Adding Instructions to Web Pages, page 5-22

FlexFields:

Region ID	Region Name	Attribute Name	FlexField Name
PAY_PAYMENTS_EMPLOYEE_TABLE_SS	Payroll Payments Employee Table	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_EDIT_DETAILS_SS	Payroll Payments Edit Details	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield
PAY_PAYMENTS_REVIEW_SS	Payroll Payments Review	PAY_BANK_KEY_FLEX	BANK Bank Details Key Flexfield

See: Configuring Flexfields, page 5-20

Configurable Profile Options

Profile	Configurable Levels	Values	Default
HR:Payroll Payments Self-Service Enable Multiple Assignments	Site	Yes/No	No

HR:Payroll Payments Self-Service Enable Multiple Assignments

Specifies whether the user can use the function to define payments for multiple assignments. The default value only permits payments for the primary assignment.

Online Payslip

The Payslip module enables self-service users to view their electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user sees an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

See: Creating a Payroll, *Oracle HRMS Payroll Processing Management Guide*

Viewing Online Payslips as a Payroll Professional

Using the Payroll Professional responsibility you can select the Payslip Details link and search for a person. When you select a person from the list, their payslip will be displayed. You can also save a person in My List for future access, so you do not need to search for that person again.

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service V5.1	Payslip V5.1

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

HR: Mask Characters - South Africa only

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

Configuration Options

To set up a payslip for your employees to view online.

See: Setting Up Payslip Information and Generating Payslips, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (UK)

The Online Payslip for the UK is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 11- 8 .

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Payslip V4.0

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.
   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Payroll Processing Management Guide*
   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Payroll Processing Management Guide*
2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*
3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*
4. Run the payment processes (for example, the Chequewriter process).
5. Run the Payslip Generation Self-Service process to enable SSHR users to view their payslip.

   See: Generating the Payslip, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (US)

The Online Payslip for the US is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 11- 8 .

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Information additional organization information. You can display elements, messages, and balances.

   See: Entering Payslip Information, *Oracle HRMS Payroll Processing Management Guide*

2. Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Person Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

See: Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Check Writer process).

5. Run the External Process Archive process to enable SSHR users to view their payslip.

   See: Running the External Process Archive Process, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (Canada)

The Online Payslip for Canada is a localized version of the generic payslip and has been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 11- 8 .

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Balances, Elements, and Message types in the Payslip Information additional organization information. If you are entering a message, you can either specify the message text or the message name. If you specify the message name, the Canadian Payroll Archiver subsequently retrieves the message from fnd_new_messages and archives it. If you enter the message text, the Canadian Payroll Archiver archives the message text entered at the organization or business group level.

   See: Entering Payslip Information, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences. You can set this information at the HR organization or business group level using the Self-Service Preferences additional organization information, or alternatively at the person or location level using an extra information type.

   See: Person Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Location Extra Information Types, *Oracle HRMS Enterprise and Workforce Management Guide*

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Canadian Payroll Archiver process to enable SSHR users to view their payslip.

   See: Running the Canadian Payroll Archiver, *Oracle HRMS Payroll Processing Management Guide*

Online Payslip (Australia, Hong Kong, Korea, Singapore, New Zealand)

The Online Payslips for the above localizations are localized versions of the generic payslip and have been designed to meet local requirements.

For information on the generic payslip functionality, see Online Payslip, page 11- 8 .

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the Payslip Balances and Payslip Elements additional organization information.

   - Payslip Balances

     See: Entering Payroll Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

   - Payslip Elements

     See: Entering Payroll Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Payslip Archive process for the appropriate legislation to enable SSHR users to view their payslip.

Online Payslip (South Africa)

The Payslip module enables self-service users to view an electronic payslip for a pay period. Users can select what pay period to view from a list of values showing the Pay Dates, or by clicking on the *Next* or *Back* button.

> **Note:** All columns and fields in the Online Payslip function are display only.

The Payslip is generated from the user's assignments. If there are multiple paid assignments for a user, the user can select the required assignment. Once the user has logged into the application and clicks on the View Payslip option, the user will see an electronic version of their payslip based on their selected assignment and the last pay period that has been processed.

If Multiple Assignment Payments functionality has been enabled for your localization, you have the option of combining the checks for multiple assignments into one pay check. In this case, the online payslip will show the combined totals for all assignments.

See: Creating a Payroll, *Oracle HRMS Payroll Processing Management Guide*

Menu and Function Names

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

User Menu Name	Function Name
Employee Self-Service	Payslip

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Not applicable

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Not applicable

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR:View Payslip From Date for WEB (MM/DD/YYYY)	User specification	Date	01/01/1997

HR:View Payslip From Date for WEB

This profile option determines how many payroll periods a user can view in the online payslip. If the profile option is not set, an error message is displayed when the user attempts to view the online payslip.

HR:Mask Characters

You can use this profile option to set the number of characters or digits to display in numbers such as bank account or credit card numbers.

Additional Configuration Options

1. Optionally define additional information to be displayed in the Other Information section of the payslip using the ZA Payslip Balances and ZA Payslip Elements additional organization information types.
   - ZA Payslip Balances

See: Business Groups: Entering ZA Payslip Balances, *Oracle HRMS Enterprise and Workforce Management Guide*

- ZA Payslip Elements

  See: Business Groups: Entering ZA Payslip Elements, *Oracle HRMS Enterprise and Workforce Management Guide*

2. Set the document viewing and printing preferences using the Self Service Preferences additional organization information.

   See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide*

3. Run the Prepayments process.

   See: Running the Prepayments Process, *Oracle HRMS Payroll Processing Management Guide*

4. Run the payment processes (for example, the Chequewriter process).

5. Run the Pay Advice Generation - Self Service (South Africa) process to enable SSHR users to view their payslip.

   See: Running the Pay Advice Generation - Self Service (South Africa), *Oracle HRMS Payroll Processing Management Guide*

Tax Withholdings Form (W-4) (US)

The Tax Withholdings Form module enables self-service users to make changes to their tax information. When a user makes changes to the Federal information, all the states that follow the Federal information are also updated, unless the filing status, number of allowances, or exempt status are different.

The following states will default to follow the Federal information: Colorado, Idaho, Kansas, Nebraska, New Mexico, North Dakota, Rhode Island, and Utah.

If a users claims tax exemption or has allowances that exceed the state limit, the HR/Payroll representative receives a notification and can review the data.

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Online Tax Forms

See: Defining Menus for SSHR, page 2- 6

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Change W4 Information JSP PRC

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

Region	Tip Type	Message Name
W4 Overview Header	Instruction	PAY_W4_OVERVIEW_MSG
W4 Update Filing Detail	Instruction	PAYSSW4_UPDATE_ HEADER_INFO
W4 Update Exempt	Instruction	PAY_US_OTF_W4_EXEM PTSTAT_TXT
W4 Update Agreement	Instruction	PAYSSW4_UPDATE_ AGREEMENT_INFO
W4 Update Filing Detail	Long Message	PAY_US_OTF_W4_ ALLOWANCES_TXT
W4 Update Filing Detail	Long Message	PAY_US_OTF_W4_ ADDLAMOUNT_TXT

See: Adding Instructions to a Web Page, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR: Online Tax Forms Update Method	Site	All, None, Primary	Primary
HR: HR/Payroll Representative Source	Site	Custom PL/SQL, GRE Contact Information, Further Payroll Information	Further Payroll Information

HR: Online Tax Forms Update Method

This profile option determines which assignments can be updated. For example, if the profile value is Primary, only the tax information for the primary assignment is updated when a user changes tax information using the Online Tax Form.

HR: HR/Payroll Representative Source

If a user makes a change to their tax information using the online tax form, a notification is sent to a designated contact person informing them of the change. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.
- GRE Contact Information: You must enter a payroll representative in the Contact Information additional organization information window.
- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

Tax Information Form (W-2) (US)

The Tax Information Form enables workers to view and print their Form W-2 Wage and Tax Statement on the web. Form W-2 Wage and Tax Statement for the year 2001 and onward will be available for viewing online and printing. A consent form from the worker is not required to place this W-2 information online because the employer must still issue a paper copy of Form W-2 (see publication 15-A for further details - available at www.irs.gov).

To view or print a Form W-2 Wage and Tax Statement for your own records, use the latest version of Adobe Acrobat Reader on your local machine.

When a user selects the Employee W-2 function, the most recent Form W-2 Wage and Tax Statement displays as a PDF file in the web page. If there is no W-2 information or if you have not configured the self-service preferences to enable online access, a message appears. You can view the Form W-2 only after the Year End Pre-Process runs successfully. If the Year End Pre-Process ended with an error status, then no online Form W-2 is available for any assignment in the GRE. If the Year End Pre-Process finishes successfully but some assignments are in error, only the successfully archived assignments is available for online viewing and printing.

Workers can request a reprint of the Form W-2 Wage and Tax Statement on paper. In this case, the payroll contact receives a notification of the reprint request. You define the payroll contact using the HR: HR/Payroll Representative Source profile option.

Menu and Function Names

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

User Menu Name	Function Name
Employee Self Service	Employee W-2

Workflow

The workflow details for this module are listed below:

Workflow Process Display Name:

Pay Employee W2 Process

Configurable Workflow Attributes:

Not applicable

Configurable Tips and Instructions

See: Configuring Web Pages , page 5-15

Region Name	Tip Type	Message Name
Pay W2 Details	Instruction	PAY_W2_PRINT_WARNING_MESG
	Instruction	PAY_NO_W2_TO_VIEW_WEB
	Instruction	PAY_NO_SS_PREF_W2_WEB

See: Adding Instructions to a Web Page, page 5-22

Configurable FlexFields

Not applicable

Configurable Profile Options

Profile	Configurable Level	Values	Default
HR: HR/Payroll Representative Source	Site, Payroll	Further Payroll Information, GRE Contact Information, Custom PL/SQL	Further Payroll Information

HR: HR/Payroll Representative Source

If a user requests a reprint of the paper Form W-2, a notification is sent to a designated contact person informing them of the request. This profile option defines how the contact person is determined. The possible values are as follows:

- Further Payroll Information: You must enter a payroll representative in the Further Payroll Information flexfield of the Payroll window.
- GRE Contact Information: You must enter a payroll representative in the Contact Information additional organization information window.
- Custom PL/SQL: You need to modify the Get_Next_Payroll_Notifier function in the PL/SQL package hr_approval_custom.

Additional Configuration Steps:

Set the document viewing and printing preferences using Self Service Preferences. You can define this information at the HR organization or business group level using additional organization information, or alternatively, at the person or location level using an extra information type.

See: Entering Self-Service Preference Information, *Oracle HRMS Enterprise and Workforce Management Guide* (for HR organization or business group level)

See: Person Extra Information Types, *Oracle HRMS Workforce Sourcing, Deployment, and Management Guide* (*Managing Your Workforce Using Oracle HRMS*) (for person level)

See: Location Extra Information Types , *Oracle HRMS Enterprise and Workforce Management Guide* (for location level)

Voluntary Deductions

Using the Total Compensation data model, a compensation or benefits administrator can enable voluntary deductions for employees by setting up Individual Compensation Distribution plans, such as charitable contributions or savings bond plans.

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

You can also set up ICD for non-manager employees if your enterprise offers discretionary contribution plans, such as a charitable contribution or savings bond plan.

See: Individual Compensation Distributions (ICD), page 10-88

12

SSHR Implementation Steps

Implementation Steps for Self-Service HR (SSHR)

SSHR is supplied with predefined data and functionality, although you must configure this data and functionality for your own implementation of SSHR.

Functions in the areas of Succession Planning have not yet been migrated to the new technology framework for SSHR version 4.x and above. For information on these functions, please see Implementing Self-Service Human Resources (SSHR) 3.4 (11*i*.2) which is available on Metalink.

> **Note:** If you try to configure functionality before you are familiar with Oracle HRMS and Oracle Workflow, you may make mistakes. Before you complete any step, read the referenced topic information.

> **Note:** It is your responsibility to populate data fields.

Implementation Flowcharts

The flowcharts provide you with a summary of the logical sequence you might follow in any implementation of SSHR. It is not the only sequence you could follow but one we recommend.

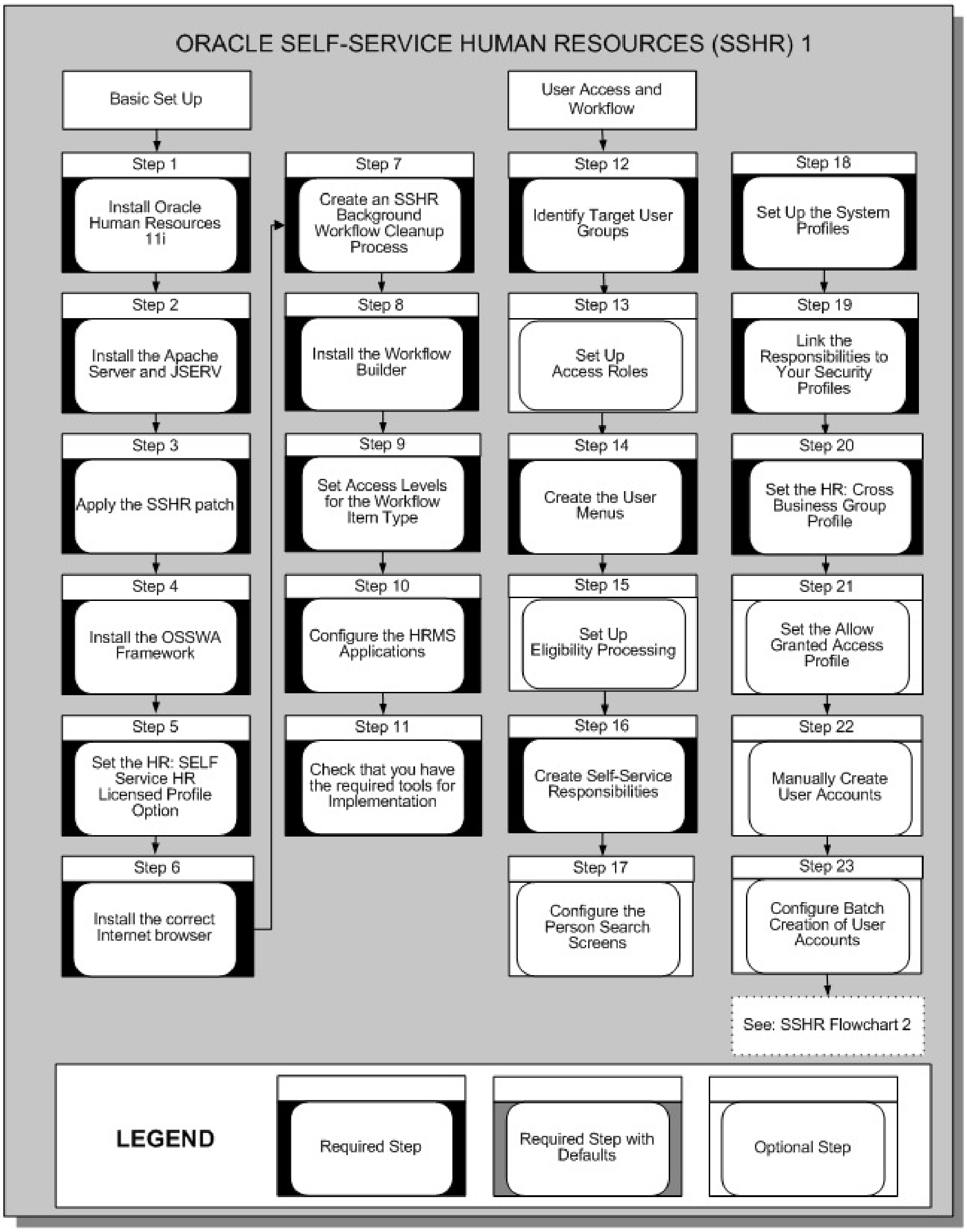
The functional areas of the system you configure to your specific business needs. Steps that are required for all implementations are marked as required.

Some functions have been seeded with default data. The steps where you can use data supplied with the system are marked as seeded.

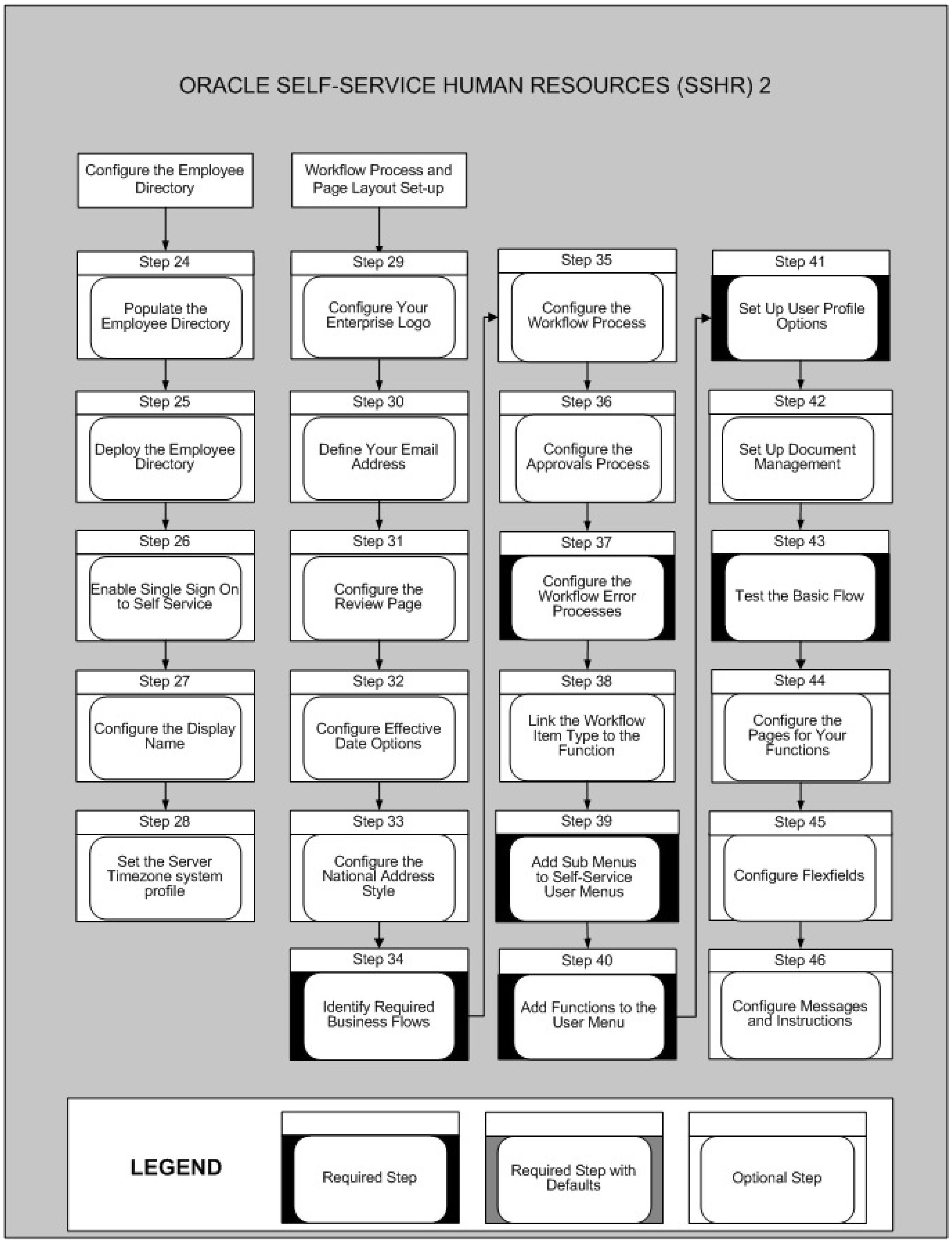
Decision making is an important part of any configuration process. Before you begin to customize SSHR, you must decide how you want to use it alongside your other Oracle HRMS applications.

Adopting a staged, or incremental, approach to configuration lets you focus on those processes you want to use.

Implementation Flowchart for SSHR, part 1



Implementation Flowchart for SSHR, part 2



Implementation Steps for Self-Service HR (SSHR)

To Prepare the Environment for SSHR: *Required Steps*

Step 1: Check HR11*i* Installation *Required Step*

Ensure that Oracle Human Resources 11*i* is installed with the most up-to-date patch according to the readme file for SSHR at the time of installation.

Step 2: Check the Apache server ***Required Step***

Ensure that the Apache server and Apache JSERV are installed. Set up the Apache server as specified in the *Oracle Self-Service Web Applications Implementation Manual* (available on Metalink).

Step 3: Apply the patch ***Required Step***

Apply the patch for the latest version of SSHR and make sure that all prerequisites are met, including those for the Oracle Applications Framework (OAF).

Step 4: Complete the install and set-up of the Oracle Applications Framework (OAF). ***Required Step***

See: *Configuring and Troubleshooting the OA Framework 5.7 with Oracle Applications 11.5.8 or Prior Releases* (available on Metalink - technical note number: 139863.1)

Step 5: Set the HR:Self Service HR Licensed profile option ***Required Step***

If you have licensed SSHR, set the following profile option to "Yes" at the site level.

- HR: Self Service HR Licensed

If you have not licensed SSHR, please contact Oracle for information on purchasing a licence.

Step 6: Check you have the correct Internet browser ***Required Step***

Check that you have the correct Internet browser. You can use Netscape Navigator 4.08 or Microsoft Internet Explorer version 4 or 5 or above.

Step 7: Create an SSHR Background Workflow Cleanup Process ***Required Step***

You should remove transaction information from the temporary tables for processes that support Web transactions. To do this, include the Remove Transaction activity in the workflow process.

See: Running the Workflow Cleanup Process:, page 4-10

Step 8: Install the Workflow Builder on Selected Workstations ***Required Step***

Members of your Implementation team who will be making changes to workflow process definitions need to have the Workflow Builder installed on their workstations or available from a file server.

Step 9: Set the Access Levels for the Predefined Workflow Item Type ***Required Step***

The predefined workflow item type is used as the basis for all future upgrades. Provided the access and protection levels are set correctly, you can work with the delivered item type and your configurations will not be overwritten.

See: Overview of Oracle Workflow Access Protection, *Oracle Workflow Administrator's Guide*.

Step 10: Configure the HRMS applications ***Required Step***

Define work structures, key flexfield, descriptive flexfields, lists of values.

See: Extend Oracle HRMS Overview, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 11: Check you have the tools for SSHR implementation ***Required Step***

Check that you now have the required tools for implementing SSHR. You should have now installed the following tools:

- Oracle Workflow
- Oracle Applications
- SSHR
- OSSWA Framework

  See: Getting Started with SSHR, page 1-19

  See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administation Guide*

User Access Setup (SSHR) *Required Steps*

Step 12: Identify the Target User Groups *Required Step*

Before starting your implementation, it is important to identify any groups of users in your enterprise who may have different requirements. Most enterprises will differentiate between managers and other workers. In your enterprise, you may identify further distinct groups such as HR professionals, managers in a particular department, or senior managers.

Step 13: Set Up Access Roles for Self-Service Actions *Optional Step*

If you want to take advantage of security based on access roles when routing and approving self-service actions, you must first activate the system profile option HR: Allow Approver updates to Self Service actions. Optionally, create and assign roles that grant or deny privileges to update actions. All users can update by default. Define and manage access roles in the Maintain Roles window.

See: Access Roles for Self Service Actions, page 3- 8

Step 14: Create the User Menus *Required Step*

User menus group together a number of functions. SSHR includes predefined menus for employees, managers, and system administrators, but we recommend that you create your own user menus using the seeded menus as a basis. To create user menus, use the Menu window.

See: Defining User Access and Menus, page 2- 6

Step 15: Create Self-Service Responsibilities *Required Step*

SSHR is supplied with predefined responsibilities, however, we recommend that you create your own responsibilities based on the seeded responsibilities. Assign a menu to them in the Responsibilities window.

See: Self-Service Responsibilities and User Access, page 3-11

Step 16: Set Up Eligibility Processing for Self-Service Actions *Optional Step*

You can configure SSHR to automatically determine if a person is eligible for a self-service action. To do this, you set up eligibility profiles, reporting groups (actions), and plans (sub actions), using SSHR Compensation and Benefits functionality as a generic processing engine.

See: Eligibility Processing Setup Example, page 7-31

Step 17: Configure the Person Search Screens *Required Step*

Three tabs are displayed on the Person Search page. You can choose whether to display all these tabs or whether to hide one or more tabs from the user. You remove a tab from display in the Menu Exclusions Region of the Responsibilities window.

See: Person Tree, page 7- 3

Step 18: Set Up the System Profiles *Required Step*

You set up the security profiles to control access to information.

See: User Access and Security, page 3- 3

Step 19: Link the Responsibilities to Your Security Profiles *Required Step*

Use the System Profile Values window to link the responsibilities you have created to your security profile.

Step 20: Set the HR: Cross Business Group Profile *Required Step*

If you want your managers to be able to access data for employees in other business groups, also set the HR: Cross Business Group responsibility.

See: User Profiles, *Configuring, Reporting, and System Administration in Oracle HRMS*

Step 21: Set the Allow Granted Access Profile *Required Step*

If you want managers to be able to access data for workers outside their security profile whose information has been released to them using the Release Employee Information function, also set the Allow Granted Access profile option to Yes for the responsibility.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

See: Release Employee Information, page 7-11

Step 22: Manually Create User Accounts *Required Step*

Create at least one user account manually to test the responsibilities and menus. For a small enterprise, you may choose to create all your user accounts manually and skip the next step.

See: Defining User Access and Menus, page 2- 6

Step 23: Configure Batch Creation of User Accounts *Required Step*

To create and manage the batch creation of user accounts, you must first write API user hooks. User hooks enable you to extend the predefined business rules to reflect your enterprise's business rules. You use the user account hooks for example, to set up your customary user name and password format, responsibilities, and profile options you want to associate with a user.

See: Writing User Hooks to Create Batch User Accounts, page 3-15

Configuring Workflow Processes and Page Layouts (SSHR) *Required Steps*

Step 24: Display Your Enterprise Logo *Required Step*

SSHR is delivered with a default Oracle logo in the upper left hand corner of the application. You can replace this logo with your own logo at the Site or Organization level.

Place the logo in the $OA_MEDIA/<Language> directory.

The logos are named FNDLWAPP.gif for SSHR version 3.2 and later, and FNDLOGHR for SSHR 2.0 functions.

See: Replacing the Default Oracle Logo, page 5-25

Step 25: Define your Email Address *Required Step*

Set up the email addresses for your enterprise. Set up the following addresses using the Attributes Value tab in the Workflow Builder:

- HR email address
- Training administrator email address
- Recruitment supervisor email address

  See: Defining Your Enterprise's Email Addresses, page 4- 9

Step 26: Configure the Review Page *Optional Step*

The Review page of most self-service actions displays an Attachments region by default. If you want users to see the What If Analysis region, you must enable the display. Hide Attachments or show What If Analysis via Personalizations.

See: Configuring Web Pages, page 5-15

Step 27: Configure Effective Date Options *Optional Step*

The Effective Date page of a self-service action presents users with two choices:

- Manually enter an effective date
- Specify that the action takes effect on approval

You can use personalizations to hide either option, effectively making the other option the default choice for all actions. If you hide the manual entry field, the Effective Date page does not appear.

See: Configuring Web Pages, page 5-15

Step 28: Configure Your National Address Style *Required Step*

To ensure that the correct address style for your country is used in the application, select one of the predefined address styles. The default address style is determined by the legislation of the business group. To select an address style, use the Descriptive Flexfield Segments window.

See Descriptive Flexfields and Address Styles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Step 29: Identify and Prioritize Required Business Flows *Required Step*

SSHR is delivered with a number of business flows incorporating workflow-enabled functions. First identify which business flows you need to implement for your enterprise. Consider the information flows and approval processes within your enterprise.

For each business flow, repeat steps 30 thru 41. Detailed information is available in the relevant chapters as indicated. Details of the configuration options are available for each SSHR module.

Step 30: Configure the Workflow Process *Required Step*

Review the underlying workflow process in the Workflow Builder. If you wish to make changes, first copy the process so that you can make changes to the copy.

See: Self-Service Workflows, page 4- 3

Step 31: Configure the Approvals Process *Required Step*

Review the seeded approvals processes and, if necessary, configure changes in the Workflow Builder.

Self-service actions now use Oracle AME as a processing engine for routing and approvals.

See: Oracle Approvals Management (AME), page 6- 6

Step 32: Configure the Workflow Error Processes *Required Step*

Each workflow-enabled function has an error process that runs when a system error occurs. The error process sends a notification and a description of the error to the sysadmin ID. You configure the error processes in the Workflow Builder.

See: Configuring Workflow Error Processes, page 4- 9

Step 33: Link the Workflow Item Type to the Function *Required Step*

Use the Form Functions Window and the Parameters field to link the workflow item type to functions. The Parameters field is displayed when you select the Form tab.

Step 34: Add Sub Menus to Self-Service User Menus *Required Step*

Add sub menus to user menus that allow users to see the Effective Date, Sub Actions, Return for Correction, Refresh Attributes, and Document Management pages.

See: Defining Menus for SSHR, page 2- 6

Step 35: Add the Functions to the User Menu *Required Step*

Make sure that your configured functions are available in your user menus.

See: Defining User Access and Menus, page 2- 6

Step 36: Set Up User Profile Options *Required Step*

User profiles control how users access information and how the information is displayed. You define the profiles at either the user or responsibility level in the System Profile Values window.

Step 37: Test the Basic Flow *Required Step*

Test the workflow process to make sure that it is correct.

See: Testing a Workflow Definition (*Oracle Workflow Guide*)

Step 38: Configure the Pages for Your Functions and Notifications *Required Step*

Use the Personalization Framework. Set up user effective date options. See the earlier step, Configure Effective Date Options, page 12- 7

See: Configuring Page Layouts, page 5- 3

Step 39: Configure Flexfields for the Regions *Required Step*

You can configure the flexfield structures in the Application Developer responsibility, then enable selected segments in the appropriate pages using the Personalization Framework.

See: Configuring Flexfields, page 5-20

Step 40: Create Messages for the Regions *Required Step*

You can add predefined messages to your regions or you can create your own messages if required.

See: Adding Instructions to Web Pages, page 5-22

Step 41: Define the Name Format in Notifications *Optional Step*

Define the way a person's name appears in your workflow notifications.

See: User Profiles, *Oracle HRMS Configuring, Reporting, and System Administration Guide*

Implementing SSHR Functions *Optional Steps*

Step 42: SSHR Functions *Optional Step*

In addition to implementing the basic SSHR tools and processes, there are also implementation steps for the following SSHR functional areas:

- Appraisals, *Oracle HRMS Implementation Guide*
- Career and Succession Planning, *Oracle HRMS Implementation Guide*
- Career Management, *Oracle HRMS Implementation Guide*
- Compensation Workbench, *Oracle HRMS Compensation and Benefits Management Guide*
- Document Manager, page 12- 9
- Employee Directory, page 12- 9

Configuring the Document Manager *Optional Steps*

Step 43: Set Up Document Management *Optional Step*

If you want to make formatted PDF documents available to users that contain merged data from self-service actions, create PDF documents and link them to appropriate menu functions by creating groups in Document Manager.

See: Document Manager, page 7-19

Configuring the Employee Directory *Optional Steps*

Step 44: Populate the Employee Directory *Required Step*

You must load data from your database into the repository. At this time you can override any of the supplied mappings with your own data.

See: Populating the Repository, page 8-31

Step 45: Deploy the Employee Directory *Required Step*

You can choose to deploy the Employee Directory from any of the following environments:

- **Self Service Personal Home Page**

  Add the Proxy Page function (HR_EMPDIR_PROXY_SS) to a menu or responsibility using the standard AOL setup. Give the function a prompt.

  See: Self-Service Menus and User Access, page 3- 9

  The Personal Home Page uses the standard Self Service Global Menu to provide global buttons. See: Configuring the Global Button Bar, page 5-24 to configure this menu.

- **Anonymous login**

  Anonymous login uses the standard Self Service Global Menu to provide global buttons, but does not render the Return to Portal or the Log Off buttons.

  For setup details, and how to add additional global buttons, see: Anonymous Access to the Employee Directory, page 8-29

- **Portal**

  For information on how to deploy the Employee Directory from a portal environment, see the following notes on MetaLink:

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=132035.1

  http://metalink.oracle.com/metalink/plsql/ml2_documents.showNOT?p_id=146469.1

Step 46: Enable Single Sign On To Self Service *Optional Step*

The Employee Directory is read only. To enable users to edit their personal information, provide them with single sign on access to Self-Service.

See: Enabling Single Sign On to Self Service, page 8-30

Step 47: Set the Server Timezone system profile *Required Step*

Set this profile option to the time zone corresponding to your server time zone. This option affects the date and time displayed on the Personal Details page.

Step 48: Configure the Display Name *Optional Step*

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 then 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 Ministere du Revenu du Quebec, also known as the Quebec Identification number. It consists of 15 digits, the first 9 identify the employer, the next 2 identify the type of tax account involved (payroll vs. corporate tax), and the last 4 identify the particular account for that tax.

Questionnaire

An SSHR function which records the results of an appraisal.

QuickPaint Report

A method of reporting on employee and applicant assignment information. You can select items of information, paint them on a report layout, add explanatory text, and save the report definition to run whenever you want.

See also: *Assignment Set*, 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 Ministere du Revenu du Quebec.

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 Ministere du Revenu du Quebec form which each employee must complete. This form is used by the employee to reduce his or her taxable income at source by claiming eligible credits and also provides payroll with such important information as current address, birth date, and SIN. These credits determine the amount of provincial tax to withhold from the employee's wages.

Special Information Types

Categories of personal information, such as skills, that you define in the Personal Analysis key flexfield.

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 Ministere du Revenu du Quebec form which allows an employee who is paid partly or entirely by commissions to pay a constant percentage of income tax based on his or her estimated commissions for the year, less allowable business expenses.

Statement of 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.

Transcentive

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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